

## Understanding the Performance Management Process

The Performance Management dashboard in ExponentHR allows you and your manager to have collaborative performance planning and two-way communication throughout the year.

Once the review period has concluded, your manager will create your performance review form utilizing a variety of resources, which may include any of the following items:

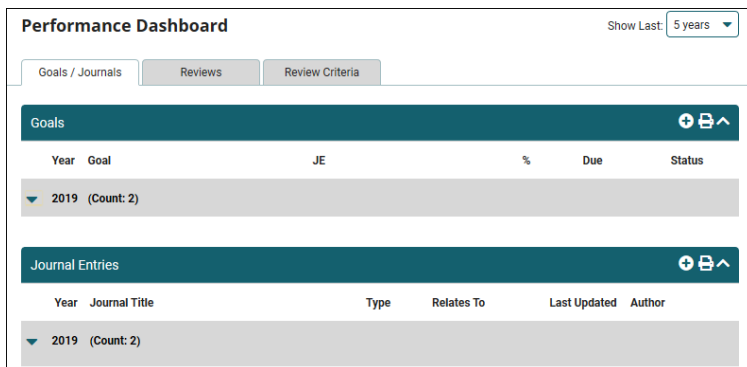
- Input you provided through the performance journals
- Progress towards approved goals
- Contributor input (by you or others if invited to complete an evaluation form)

After management has finalized your performance review form, a copy will be electronically sent to you for acknowledgment and the ability to add notes.

## How Do I Access My Performance Dashboard?

### My Info > Performance Management

In your Performance Dashboard, a variety of tools regarding the performance review process are available at your fingertips. These resources are on three main tabs of the dashboard as outlined below:



## What Basic Criteria Will I be Evaluated On?

### Review Criteria

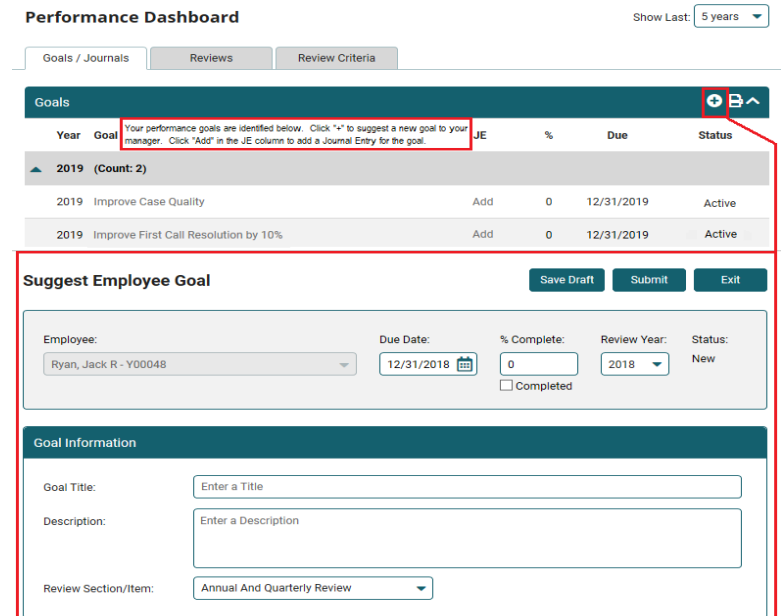
On the Review Criteria tab, you can view the criteria to which your performance will be measured for prior, current or next year review.


## How Can I Suggest a Personal Goal to My Manager?

### Goals/Journals

Through the Performance Dashboard, you can suggest personal goals that you would like to attain during the review year. If approved, it will be documented on your performance review.

**Note:** The use of personal/company goals in the performance evaluation process is an optional feature that may not be activated by your employer.



1. Click the  button.
2. Select the review year.
3. Enter the date you want to have your goal completed by.
4. Type a title for the goal.
5. Type a detailed description of your goal.
6. If the goal is associated with a specific evaluation criterion, make the appropriate selection in the **Review Section/Item** drop-down list.
7. Click the **Submit** button.

The goal is sent to your manager for approval. The manager must approve the goal before you can update your progress towards the goal.

## How Do I Update Progress Towards My Goals?

### Goals/Journals

During the review year, you can update your progress on any company and/or personal goals.


1. Click on the title of the respective goal you want to update.
2. Change % **Complete** field value to reflect your progress toward the goal. When the goal is reached, check the *Completed* checkbox.
3. Click the **New Entry** button to type a journal note detailing progress.
4. Click the **Save** button.

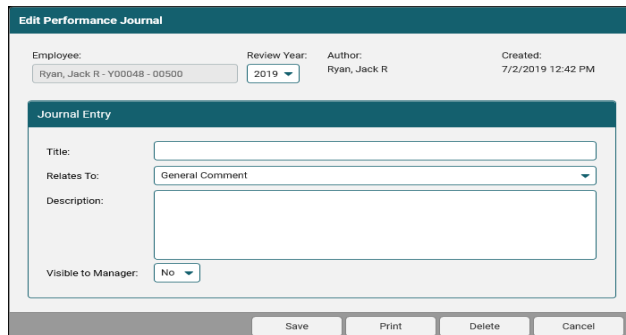
**Note:** The % **Complete** box lets you update your progress throughout the year towards completing your goal.

## How Do I Create Journals?

### Goals/Journals

Journals are used by both you and your manager to facilitate the two-way, documented performance communication.

1. Click the  button in the *Journal Entries* section.
2. Type a title for the journal entry.
3. If the journal is associated with a specific evaluation criterion, make the appropriate selection in the **Relates To** drop-down list.
4. Type the journal entry in the **Description** field.
5. Designate whether the journal entry is visible to management or just you.
6. Click the **Save** button.

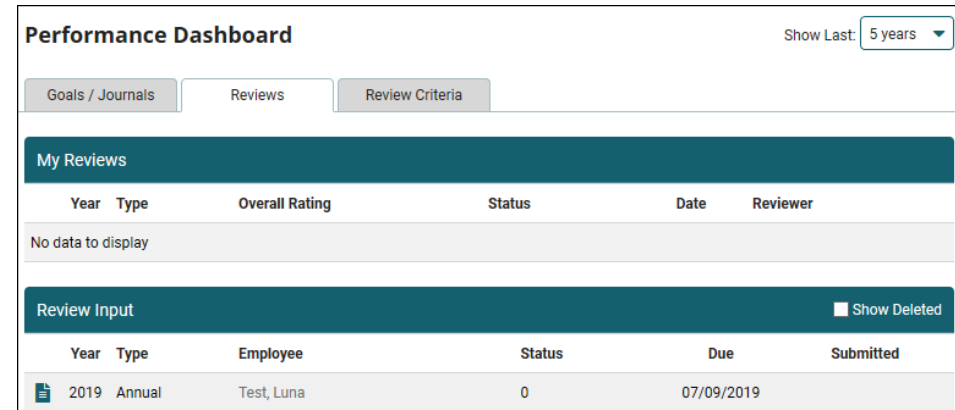


**Note:** A journal note made be made visible to your manager or kept as private for only you to view.

## How Can I Create a Contributor Review?

### Reviews

To obtain additional insight when evaluating an individual's performance (yours or someone else's), you may be invited to participate in a contributor review. If so, the management team will send you an invitation to complete the review, which can be accessed on the **Reviews** tab of the Performance Dashboard.



Year	Type	Overall Rating	Status	Date	Reviewer
No data to display					

Year	Type	Employee	Status	Due	Submitted
2019	Annual	Test, Luna	0	07/09/2019	

1. In the *Review Input* section, click on the review you have been invited to.
2. Complete the evaluation form by adding comments, ratings, or any other input related to the review.
3. Click the **Submit** button to send your input.

## How Do I Acknowledge Receipt of My Review?

### Reviews

Once your manager has completed your review, an electronic copy will be made available for your review and acknowledgment.

1. In the *My Reviews* section, click on the delivered review.
2. Review your ratings, as well as any comments and click the **Acknowledge** button.
3. Type any comments of your own in the available **Acknowledge Review** text box.

**Important:** Acknowledging the review means you have read the review and does not require you to agree with its contents.

If you need further assistance with any part of ExponentHR, contact the ExponentHR Service Team at: (866) 612-3200 or support@exponenthr.com.