

Understanding Performance Management

The Performance Management utility in ExponentHR allows you to evaluate your employees' performance relative to have a collaborative performance planning and two-way communication throughout the year.

The performance review cycle is defined by your company's review schedule.

- Throughout the **Review** period, monitor and take note of the employees' performance based on the set criteria. It is also during this time that you review/approve personal goals submitted by employees, or entered by you, to document their accomplishments and progress via journaling.
- During the **Draft & Approval** period, create the performance reviews based on journals and contributors' input. Once compiled, you submit the drafted review to upper management for approval.
- In the **Evaluation** period, deliver a copy of the finalized performance review to employees. Through electronic delivery, employees may be asked to acknowledge their reviews and provide any final comments.

Review	Performance criteria, goals, schedule set
	Manager approves employees' personal goals
	Manager updates progress toward goals
Draft & Approval	Manager creates employee's performance review
	Contributors creates reviews (when invited)
	Manager submits review and gets approval
Evaluation	Manager meets with employee for evaluation
	Employee acknowledges receipt of review
	Review posted for reference

Note: Please refer to your organization's schedule as it may differ slightly.

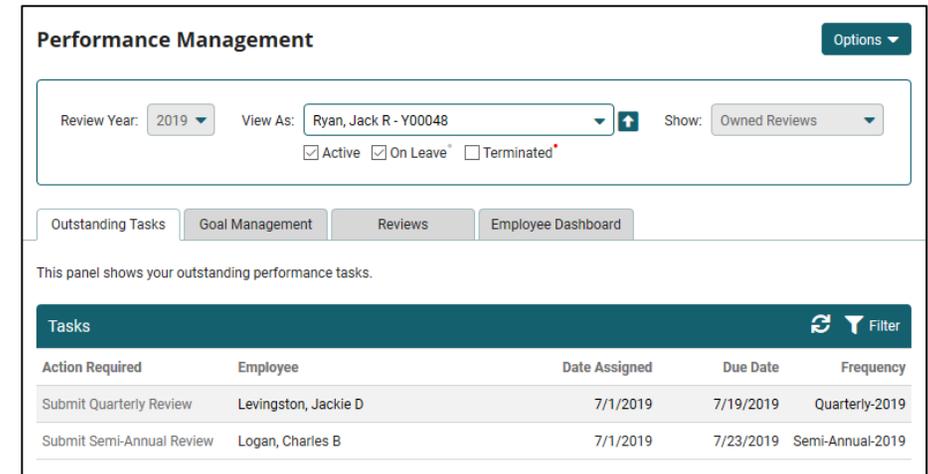
How Do I Access My Performance Dashboard?

HR Administration > Performance Management

In your Performance Dashboard, you can easily access a variety of tools regarding the performance review process. These resources are on four main tabs of the dashboard as outlined below:

Outstanding Tasks

The first tab on the dashboard is the **Outstanding Tasks**, which is where performance tasks requiring action can be immediately brought to your attention.



Performance Management Options

Review Year: 2019 View As: Ryan, Jack R - Y00048 Show: Owned Reviews

Active On Leave Terminated

Outstanding Tasks | Goal Management | Reviews | Employee Dashboard

This panel shows your outstanding performance tasks.

Tasks Filter

Action Required	Employee	Date Assigned	Due Date	Frequency
Submit Quarterly Review	Levingston, Jackie D	7/1/2019	7/19/2019	Quarterly-2019
Submit Semi-Annual Review	Logan, Charles B	7/1/2019	7/23/2019	Semi-Annual-2019

Using the available sorting options (clicking on column header) or filtering capabilities (clicking filter icon), it is easy to review performance tasks that are impeding a deadline or overdue. Click on any task to take action on it.

Goal Management

In addition to the company goals that may have been set for employees by your organization, employees have the option to suggest personal goals that they would like to have included on their personal evaluation form. On the **Goal Management** tab, you are able to approve any submitted personal goals as well as enter the goals on behalf of the employee(s). This tab also allows you to track the progress towards the goal completion. The dashboard graphs give you quick insight to status and progress of the goals.

The screenshot displays the Performance Management interface. The top section shows filters for Review Year (2018), View As (Ryan, Jack R - Y00048), and Show (Owned Reviews). Below this are tabs for Outstanding Tasks, Goal Management, Reviews, and Employee Dashboard. The Goal Management section includes two pie charts: Goal Status (Drafted, Submitted, Active, Rejected, Canceled, Completed) and Goal Progress (Not Started, 1-24%, 25-49%, 50-74%, 75-99%, Completed). A table lists goals, with one goal highlighted: Diaz, Victor D - J0009 - 8050A (3) with 50% completion and Active status. Below this is the 'Edit Employee Goal' form, which is highlighted with a red border. The form includes fields for Employee (Diaz, Victor D - J00099), Due Date (12/31/2018), % Complete (50), Review Year (2018), and Status (Active). The Goal Information section contains fields for Goal Title (Bring in 50 new prospects), Description (Bring in 50 new sales prospects by year end), Review Section/Item (Annual Review), and Cascaded Goal (none). There are also checkboxes for 'Allow Employees to see cascaded goal' and a 'Show Goal Alignment' button.

Upon selecting a listed goal, you can update the percentage complete and add any journal notes that will be made visible when it is time to draft the performance review form for the employee.

Reviews

When working on the **Reviews** tab, you can choose to work on an individual performance review as well as accomplish bulk actions across multiple selected reviews (such as bulk submitting, approving, or sending self-review invitations). The dashboard graphs give you quick insight to status and the rating distribution of the reviews.

The screenshot shows the Performance Management interface with the Reviews tab selected. It features a 'Review Status' pie chart and a 'Ratings' section with 'No Ratings Data Available'. A table lists reviews with columns for Employee Name, Reviewer, Type, Last, Current, Review Status, and Deadline. The table contains three entries: Levingston, Jackie D (Quarterly, Not Started, 4/19/2019), Levingston, Jackie D (Quarterly, Drafted, 7/19/2019), and Logan, Charles B (Semi-Annual, Not Started, 7/23/2019).

Employee Dashboard

The **Employee Dashboard** provides a focused user experience with the ability to select a single employee and view all current and historical performance information associated with that employee. This includes the ability to view any outstanding items, update progress towards goals, create goals and journal entries, as well as manage the actual performance review.

The screenshot displays the Performance Management interface with the Employee Dashboard selected for Applegate, Vicki - X00117. It shows a 'Reviews' table with columns for Year, Type, Overall Rating, Status, Due, Updated, and Reviewer. The table lists reviews from 2016 to 2019, including Annual and Periodic reviews with various statuses like 'Not Started', 'Incomplete', and 'Meets Expectations'. Below the reviews table is a 'Goals' section with '(2 Goals)'.

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