

Performance Reviews – Manager Assessment

Manager Assessment Notification

- Once employee has completed their portion of their review an email will be sent requesting Manager Assessment

Notification: Employee Assessment

 Di Marzio, Sabrina Lynn <messages-noreply@ultimatesoftware.com>
To: Human Resources
If there are problems with how this message is displayed, click here to view it in a web browser.

 Reply  Reply All  Forward  
Thu 1/30/2025 10:03 AM

CAUTION: This email originated from outside your organization. Do not click links, open attachments or follow instructions unless you have verified the sender and know the content is genuine and safe.

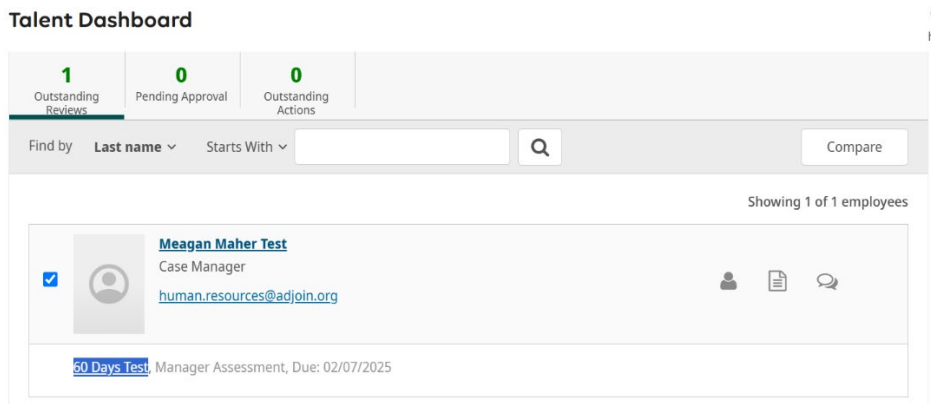
The Employee Assessment task for Test, Meagan Maher is available for you to evaluate and complete.

Please note that this task is due by 02/04/2025 11:59:59 PM.

You can access the review from the Myself, Jobs, Reviews or from Menu, Inbox and the "edit" link.

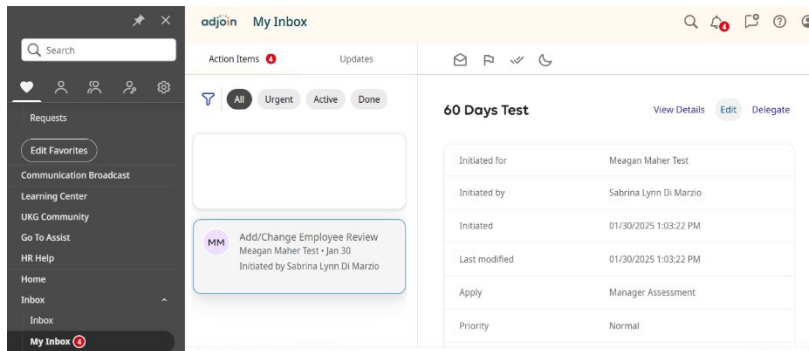
Review Summary

- Navigation: Menu > My Team > Talent Management > Talent Dashboard > Reviews > Click on the Review Name (see screenshot below)



The screenshot shows the 'Talent Dashboard' interface. At the top, there are three summary cards: '1 Outstanding Reviews', '0 Pending Approval', and '0 Outstanding Actions'. Below these is a search bar with 'Find by Last name' and 'Starts With' dropdowns, a search icon, and a 'Compare' button. The main content area shows 'Showing 1 of 1 employees'. The employee listed is 'Meagan Maher Test', a Case Manager with email 'human.resources@adjoin.org'. Below the employee name is a '60 Days Test, Manager Assessment, Due: 02/07/2025' link.

- Note: Employee Reviews can also be accessed from your Inbox. Click the edit button to be brought to the review



The screenshot shows an email inbox interface. The email title is '60 Days Test'. The email content includes a table with the following details:

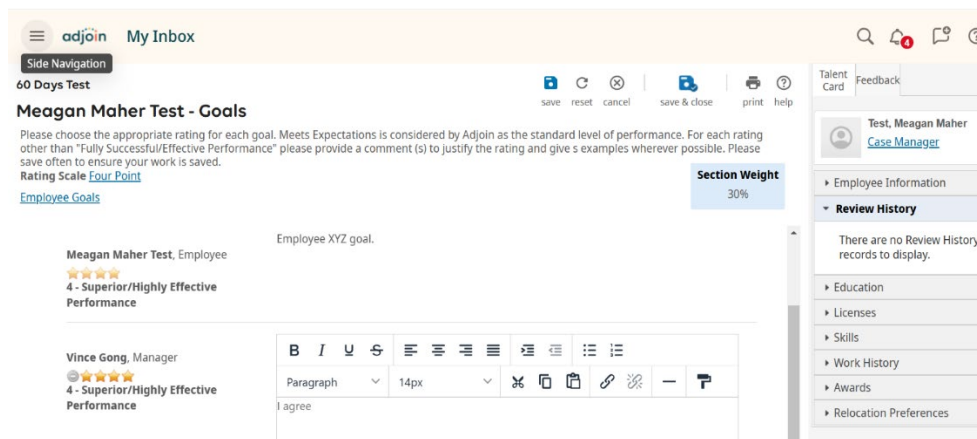
Initiated for	Meagan Maher Test
Initiated by	Sabrina Lynn Di Marzio
Initiated	01/30/2025 1:03:22 PM
Last modified	01/30/2025 1:03:22 PM
Apply	Manager Assessment
Priority	Normal

1. Select a review from the **Talent Dashboard**, the **Talent Profile**, or the **Inbox**. The **Review Summary** page appears.

2. Open each section of the review, by selecting any of the **Start** buttons.
 - Review sections do not have to be completed all at once or in any particular order. Once review information is entered, it can be saved and can be edited up until it is sent to the next contributor.
 - The final score appears only after the Goals and Competencies sections are completed.
 - A review cannot be sent to the next contributor until all required sections are complete.

Manage Goals

1. From the **Review Summary** page, complete one of the following:
 - To begin rating goals, select the **Start** button in the **Goals** section. The **Goals** page displays the employee's assigned goals.
 - To edit a rating, select the **Edit** button in the **Goals** section. The **Edit** button appears only after the section has been started. The Edit button appears even if the review ratings are completed. You can modify the review ratings as the current contributor until the review has been sent to the next contributor.
2. At each goal, select a rating and enter comments, as needed.



- The **Rating Scale** link, located in the upper left-hand corner, indicates the rating scale that is assigned to this review. You can select the link to view the scale descriptors
- The **View Entire Goal Plan** link, located below the rating scale, displays for users with access to the employee's goals. You can select the link to display all goals for the employee

- The **Show Details** link, located below the goal description, indicates the goal alignment and type. You can select the link to display alignments.
 - The **Goal Notes** link, located below the goal details, allows you to view, enter or update progress for each goal.
 - The **Section Weight**, located in the upper right-hand corner, indicates the percentage assigned to the Goals section, if applicable. Each goal weight is also listed.
3. Select **Save** to continue entering review information.
 4. Select **Save & Close** when you have completed all entries on this page. The **Review Summary** page appears.

Manage Competencies

1. From the **Review Summary** page, complete one of the following:
 - To begin rating competencies, select the **Start** button in the **Competencies** section. The **Competencies** page displays the employee's assigned competencies.
 - To edit a rating, select the **Edit** button in the **Competencies** section. The **Edit** button appears only after the section has been started. The **Edit** button appears even if the review ratings are completed. You can modify the review ratings as the current contributor until the review has been sent to the next contributor.
 - To add a note to an existing competency, select the Competency Notes link.
2. At each competency, select a rating and enter comments as needed.
 - The **Rating Scale** link, located in the upper left-hand corner, indicates the rating scale that is assigned to this review. You can select the link to view the scale descriptors.
 - The **Show Details** link, located below the competency description, indicates the competency type. You can select the link to display the competency type associated with this competency
 - The **Notes** link, located below the competency details, allows you to view or enter notes for each competency

- The **Section Weight**, located in the upper right-hand corner, indicates the percentage assigned to the **Competencies** section, if applicable. Each competency weight is also listed.
3. Select **Save** to continue entering review information.
 4. Select **Save & Close** when you have completed all entries on this page. The **Review Summary** page appears.

Manage Open Ended Questions

1. From the **Review Summary** page, select one of the following from the open ended question section:
 - Start - enables you to begin answering the questions.
 - Edit - enables you to edit answers that have been entered previously.
 - View - enables you to review answers that were entered.
2. Enter the answers to each question.
3. Select **Save** to continue entering review information.
4. Select **Save & Close** when you have completed all entries on this page. The **Review Summary** page appears.
 - When all questions are answered, the section displays a Completed Status.

Manage Developmental Comments

1. From the **Review Summary** page, complete one of the following:
 - To begin entering comments, select **Start** in the **Developmental Comments** section.
 - To edit comments, select the **Edit** in the **Developmental Comments** section. The **Edit** button appears only after the section has been started. The **Edit** button appears even if the comments are completed. You can modify comments as the current contributor until the review has been sent to the next contributor.
2. For self-assessments, employees enter comments in the **Employee Comments** box. For manager assessments, managers enter comments in the **Manager Comments** box. When completing a matrix manager assessment, enter comments in the **Comments** box.
3. To access the employee's development plan, select the **View Personal Development Plan** link.
4. Select **Save** to continue entering review information.
5. Select **Save & Close** when you have completed all entries on this page. The **Review Summary** page appears.

Meagan Maher Test - Developmental Comments

Enter comments outlining development plans, action steps to accomplish them, and desired outcomes. [View Personal Development](#)

Employee Comments

test comment

Manager Comments

B	<i>I</i>	<u>U</u>	↻	≡	≡	≡	≡	≡	≡	≡	≡	≡	≡	≡	≡	≡	≡	≡	≡	
Paragraph	▼	14px	▼	✂	📄	📄	🔗	🔗	—	🔧										
test																				

Manage Overall Comments

1. From the **Review Summary** page, complete one of the following:
 - To begin entering comments, select the **Start** button in the **Overall Comments** section.
 - To edit comments, select the **Edit** button in the **Overall Comments** section. The **Edit** button appears only after the section has been started. The **Edit** button appears even if the comments are completed. You can modify comments as the current contributor until the review has been sent to the next contributor.
2. Enter your comments in the **Comment** box.
3. Select **Save** to continue entering review information.
4. Select **Save & Close** when you have completed all entries on this page. The Review Summary page appears

60 Days Test

Meagan Maher Test - Overall Comments

This comment is for any other feedback you wish to provide. It may be further clarification on goals and competencies or it may be something unrelated that you just want to make sure is included. This comment will be viewable as part of the approved review.

Comment:

B I U [Align] [List] [Link] [Image] [Table] [Text] [Undo] [Redo]

Paragraph 14px [Link] [Image] [Table] [Text] [Undo] [Redo]

Example Overall Comment

Talent Card Feedback

Test, Meagan Maher
[Case Manager](#)

Employee Information

Review History

There are no Review History records to display.

Education

Licenses

Skills

Work History

Awards

Relocation Preferences

Final Review Score

When all rated sections of the review are completed, ratings are automatically calculated and appear as the Manager Final Score.

Review Summary [back] [print full review] [help]

Review sections	Employee Rating	Manager Rating	
<p>✔ Goals Completed</p>	4.00 - Superior/Highly Effective Performance	4.00 - Superior/Highly Effective Performance	<input type="button" value="Edit"/>
<p>✔ Competencies Completed</p>	3.09 - Fully Successful/Effective Performance	2.55 - Partially Successful/Needs Improvement	<input type="button" value="Edit"/>
Open Ended Questions	N/A	N/A	<input type="button" value="Edit"/>
Developmental Comments	N/A	N/A	<input type="button" value="Edit"/>
Overall Comments	N/A	N/A	<input type="button" value="Edit"/>
Final Score	3.36 - Fully Successful/Effective Performance	2.98 - Partially Successful/Needs Improvement	

Send

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Send the Review

- From the **Review Summary** page, complete one of the following:
 - Select the radio button to send the review **Forward** to the employee to **Sign & Complete**.
 - Select the radio button to send the review **Forward** to an approver.
 - Select the radio button to send the review **Back** for changes.
- In the **Routing Comments** section, enter relevant comments. These comments will only append to the e-mail notification and not appear in the review. The comments will also be visible in the **Request Inbox**, in the **Approver History** section.

- When an Administrator is included in the contributor path, you may be required to select the HR approver to confirm the review.
3. Select **Send**. A confirmation pop-up window appears.
 4. Select **OK**.

Send

Send to the next contributor.

- Send **forward** to Sabrina L Di Marzio
- Send **back** to Meagan Maher Test for changes

Send

g035102p01x.ukg.net says

Send this review to the next contributor? Once you do, you won't be able to make further changes.

OK

Cancel

Acknowledge the Review

1. From the **Review Summary** page, review each section of the performance review to ensure accuracy.
2. In the **Sign & Complete** section, enter any final comments you would like to save in the review.
3. Select **Sign & Complete**. A confirmation pop-up window appears.
4. Select **OK** to confirm the completion of the review.
 - An employee's most recent completed performance review is available on the **Talent Dashboard** page (**My Team > Talent Dashboard**).
 - All reviews are available on an employee's **Reviews** page (**My Team > My Employees > Select Employee > Jobs > Reviews**).

Review Summary

60 Days Test
Meagan Maher Test, Case Manager
Effective Date 02/01/2025

The performance evaluation is to provide employees with feedback to their performance for the current review period and to set goals for the upcoming review period.

Contributors



Review sections

Table with 3 columns: Section, Employee Rating, Manager Rating, and View button. Rows include Goals, Competencies, Open Ended Questions, Developmental Comments, Overall Comments, and Final Score.

Sign & Complete

Send to the next contributor.

Sign & Complete

g035102p01x.ukg.net says

Are you sure you want to Sign & Complete this review?
Signing and completing this review will prevent further changes.

OK Cancel buttons