

Performance Review System (PRS) User Guide

Overview

The online Performance Review System serves as a tool for employees and supervisors to complete the annual performance review process. The review process may include submitting a self-assessment on the performance of their principal job responsibilities and behavioral expectations and to set goals and objectives for the next performance year, if directed to do so by the supervisor. **A Performance Review should be completed by the supervisor of record as of March 31 for regular staff (full-time and part-time) except for those in an Introductory Period (IP) as of March 31.** *Regular staff in an IP will not be on the supervisor's list in the system.*

Log In

At <https://hr-performance-review.oitapps.ua.edu/> using your **myBama** credentials

Annual Performance Review Cycle Performance Year (April 1 – March 31)

Steps	Actions	Dates	Steps	Actions	Dates
Step 1	Goal Setting (recommended)	Begins April 1	Step 6	Employee Self-Assessment (recommended)	Begins March 20
Step 2	Supervisor Review/Approval of Goals		Step 7	Supervisor Completes Evaluation*	Begins March 27
Step 3	Mid-Year Check-In (recommended)	October – November	Step 8	Next Level Supervisor and Additional Approver (optional) Review and Sign-Off	
Step 4	Update Job Description, if needed	By December 31	Step 9	Annual Review Discussion with Employee	By May 8
Step 5	Update Supervisor Data, if needed (HDT delegate)	By March 8	Step 10	Employee Acknowledgment (Annual Review Process Complete)	By May 15

*The supervisor should contact their assigned [HR Business Partner](#) no later than April 15 to discuss any Annual Reviews with an overall rating of "Does Not Meet Expectations" and "Partially Meets Expectations".

Annual Performance Review format

Employees will be rated on the performance of their principal job responsibilities (80%) and behavioral expectations (20%) using a five-tier rating scale.

 Principal Job Responsibilities	 Behavioral Expectations	 Five-Tier Rating Scale
Essential job duties as listed in the position description.	<ul style="list-style-type: none"> • Accountability/Dependability • Collaboration • Continuous Improvement • Effective Communication • Ethics/Integrity • Service Excellence 	<ul style="list-style-type: none"> • Consistently Exceeds Expectations • Partially Exceeds Expectations • Meets Expectations • Partially Meets Expectations • Does Not Meet Expectations

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Review Status with Definitions and Goal Outcome Options

Review Status	Definition	Goal Outcome Options
Goal Setting & Self-Assessment	The supervisor has not yet initiated the review. The employee can submit goals and/or a self-assessment at this time.	Complete
In Progress	The supervisor has begun the review but has not yet submitted it to the next-level supervisor OR the review has been returned to the supervisor from the next-level supervisor for revisions.	In Progress, On Track
Next-Level Supervisor Review	The review is waiting for next-level supervisor approval which could include waiting on approval by an additional approver, if one was assigned.	In Progress, Not on Track
Pre-Employee Release	The review has been approved by the next-level supervisor but has not yet been sent to the employee by the supervisor.	Not Met
Employee Review	The review is pending the employee's comments and acknowledgement.	No Longer Applicable
Complete	The employee has acknowledged the review.	Other



Annual Performance Review Process

1. Employee

Goals: If the Employee is directed by their Supervisor to add goals, they will select the **1. Goals** option in the *Your Annual Review* section of the dashboard. Select the appropriate review year from the drop-down menu. Select the **Add New Personal Goal** button. Add a title, text, and deadline for each goal. Once all goals have been added, select the **Submit Goals to Supervisor** button. Comments and attachments (PDF only) can be added to a goal throughout the performance year using the related icon. The Employee can view their submitted goals by selecting the **View Your Personal and Departmental Goals** link.

Self-Assessment: If the Employee is directed to complete a self-assessment by their Supervisor, they will select the **2. Self-Assessment** option in the *Your Performance Review* section of the dashboard. Add comments and/or attachments (PDF only) on the performance of their job duties and the behavioral expectations in the comment fields available in the *Job Duties* and *Behavioral Expectations* sections. Submit the self-assessment, prior to the Supervisor beginning the review, by selecting the **Submit Self-Assessment to Supervisor** button. The Employee can view their submitted self-assessment by selecting the **View Your Self-Assessment** link.

2. Immediate Supervisor

Your Employees: Using the Grid view  or the Actions dropdown in the Table view  in the *Your Employees* section of the dashboard, the Supervisor can view and take action on their employees' reviews.

NOTE: If the Next-Level Supervisor field for an Employee is not populated or is inaccurate, the Supervisor should contact their [HDT delegate](#) to update that information before proceeding with the review process.

Prior to initiating the review, the Supervisor can view an employee's job duties, their goals, and/or self-assessment submitted for the current or the previous review year, as well as previous reviews if submitted in this system, from the *Your Employees* section of the dashboard.

Goals: The Supervisor may request that goals for the upcoming review year be submitted prior to or after completing the review for the current review year. Review any submitted goals by selecting **Goals**. Add comments and/or attachments (PDF only) for goals for the current review year, if needed. Update the status of each goal for the current review year by selecting the **Select an Outcome** button and choosing the appropriate option. Select the **Release Goals Back to Employee** button to send return goals to the employee for revisions.

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Self-Assessment: View the Employee's comments and/or attachments (PDF only) on their performance, if submitted, by selecting **Self-Assessment**. The Supervisor can return the self-assessment to the employee, if needed, prior to the Supervisor initiating the review, by selecting the **Release Self-Assessment Back to Employee** button.

Select **Begin Performance Review** to initiate the review for the Employee. **NOTE:** Once the review is initiated, the Employee will no longer be able to submit a self-assessment.

Ratings: Rate each job responsibility and each behavioral expectation; Provide justification and examples to support any ratings that are not "Meets Expectations"; Compare the ratings of this review to other direct reports' ratings to ensure a consistent approach in applying the job duty and behavioral expectations rating standards.

Select the final **Overall Rating** to be issued. The calculated rating is highlighted in blue. Select the final overall rating to be issued to the employee which will then be highlighted in red. If there are extenuating circumstances such as disciplinary action taken during the review year which needs to be factored into the overall rating, please consult with the assigned [HR Business Partner](#). Contact the assigned [HR Business Partner](#) to discuss the review for any Employee receiving an overall rating of "Does Not Meet Expectations" or "Partially Meets Expectations".

Comments and Attachments: Add comments in each section to support the ratings of the review. Add attachments (PDF only), if needed.

Signature and Acknowledgment: Select the **Sign Review** button and then the **Proceed to Next-Level Supervisor Review** button. *If the Next-Level Supervisor noted under this button is not accurate, do not proceed but contact your [HDT delegate](#) to update that information.*

No further action is needed until the Next-Level Supervisor approves the review or sends it back to the Supervisor for edits. If the Next-Level Supervisor assigns an Additional Approver to the employee's review, the Supervisor will be notified via email.

3. Next-Level Supervisor

Approvals Needed: The Next-Level Supervisor will receive email notification once the Supervisor has signed off on the review. In the *Approval Needed* section on the dashboard, the Next-Level Supervisor can view a list of all their direct reports' employees and approve reviews for those awaiting approval.

Select **View Review** to access a performance review which is pending approval. To view the Employee's goals and attachments, download the PDF using the download button in the upper-right corner of the dashboard. Discuss with the Supervisor any extenuating circumstances, such as disciplinary action taken during the review year, as these may need to be factored into the overall rating. Compare the ratings for all reviews of direct reports' employees to ensure there is consistency in applying the job duty and behavioral expectations standards between Supervisors. Add comments and/or attachments in the Next-Level Supervisor Comment box, if desired.

If edits need to be made, return the review to the Supervisor for necessary changes by selecting the **Send Back to Supervisor** button, add a reason for returning the review in the **Comments to Supervisor** field, and select the **Send Back to Supervisor** button.

Adding an Additional Approver: If an Additional Approver is needed, the Next-Level Supervisor will:

- assign an Additional Approver **after** any needed changes to the review have been made by the supervisor and all comments and attachments (PDF only) have been added by the Next-Level Supervisor, if desired; **and**
- wait for email notification of approval by the Additional Approver before signing off on the review.

Returning the Review to the Supervisor for Edits with an assigned Additional Approver: If the Next-Level Supervisor returns the review to the Supervisor for edits while the Additional Approver sign off is pending or the review has already been approved by the Additional Approver, the Additional Approver loses access to the review along with any comments or attachments they added. The Next-Level Supervisor will need to re-assign the Additional Approver once the review is back at the Next-Level Supervisor Review status for the Additional Approver's initial or subsequent approval.

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Removing the Additional Approver: The Next-Level Supervisor can remove the Additional Approver from an employee's review using the **View/Add Additional Approver** button at the top of the screen. *They should contact their assigned HR Business Partner before taking that action if the review was already approved by the Additional Approver.*

Signature and Acknowledgement: When ready to approve the performance review, select the **Sign Review** button and then the **Approve and Sign Performance Review** button.

4. Additional Approver (if assigned)

Approvals Needed: Email notification will be sent to the Additional Approver once assigned by the Next-Level Supervisor. Reviews needing approval by an Additional Approver will be listed in the *Approval Needed* section of the dashboard. Select **View Review** to access the performance review. To view the Employee's goals and attachments, if submitted, download the PDF.

Follow up with the Next-Level Supervisor with any questions or concerns. If the Next-Level Supervisor returns the review to the Supervisor for edits either (1) while the review is pending approval by the Additional Approver or (2) after it has been approved, the Additional Approver will no longer have access to the review. Email notification is sent to the Additional Approver when the review is returned for edits. Another notification will be sent to the Additional Approver when the revised review is returned to the Next-Level Supervisor and is ready for your initial or subsequent approval.

Signature and Acknowledgement: Add comments and/or attachments (PDF only) in the Additional Approver Comment box, if desired. When ready to approve the review, select the **Sign Review** button and then the **Approve and Sign Performance Review** button.

5. Immediate Supervisor

Returned Performance Review: The Supervisor will receive an email notification if a review has been returned for edits by the Next-Level Supervisor. Make any necessary revisions and then sign off on the review to resubmit it to the Next-Level Supervisor.

Approved Performance Review: The Supervisor will receive email notification once the Next-Level Supervisor has approved the review. Meet with the employee face-to-face, or in a virtual meeting, if necessary, to discuss the performance review. Discuss the status of the goals assigned for the review period being evaluated, if applicable. Provide the employee access to their approved review in the system in the *Overall Rating* section of the review by selecting the **Release Review to Employee** button.

New Goals: Goals for the upcoming review year may be set in the performance review meeting, or in a subsequent goal-setting meeting. Select the upcoming review year from the drop-down menu for the new goals. The Supervisor can also add Departmental Goals for the new review year.

6. Employee

View the final Performance Review: The Employee will receive email notification once the review has been released to them. Click on **View Review** in the **3. Performance Review** option in the *Your Annual Review* section of the dashboard to access the final review.

Comment on and Acknowledge Your Performance Review: Go to the Employee Comments field found in the *Overall Rating* section to add comments and/or attach additional documents (PDF only), if desired. Acknowledge the form verifying the review has been discussed by selecting the **Sign Review** button. The employee's acknowledgement does not necessarily indicate agreement with the review.

Previous Reviews: The Employee can access any reviews completed in the Performance Review System by selecting **Previous Reviews** from the employee profile dropdown list in the upper-right corner of the dashboard.

NOTE: If an employee chooses not to acknowledge their review by the **May 15** deadline, the review will be considered received and acknowledged, and become a part of the employee's UA personnel file.