FY18 FAS Performance Management FAQs

General questions

1. What is changing with performance management in the FAS this year?
   In FY17 a one page word document was used to track performance conversations within FAS. For FY18, a very similar form is being used across Harvard. This year (unlike FY17), managers can upload the completed form to PeopleSoft for record keeping.

2. What is the timeline for performance management this year?
   This year’s timeline extends from June 1, 2017 to July 30, 2018. If an earlier timeframe works better for you, please feel free to complete this work before July 30.

3. Even if I’ve been having ongoing performance conversations with my direct reports, do I still need to have a year-end performance conversation with my employees?
   Yes. While this new approach encourages managers to have continuous performance conversations with staff during the year, a short closing conversation is still encouraged.

4. What should I do if it is the end of the year and I haven’t had ongoing performance conversations?
   Regardless of whether you have been having ongoing conversations throughout the year or not, you should still plan to have a closing performance conversation with your direct report, document your conversation on the form, and then upload it into PeopleSoft. While the closing performance conversation will be about FY18 performance, you may also start your conversation about FY19 goals.

5. How do I set goals for FY19?
   In the form, you will see a section dedicated to “FY19 Individual/Priorities/Expectations/Expected Impact.” In this the section, you should summarize your FY19 goals. If your FY19 goals are not finalized by the time you upload your FY18 form into PeopleSoft, you can wait and record your FY19 goals on the FY19 form when it becomes available at some point in the next few months.

Questions regarding the form

6. How do I use the performance conversations form?
   Managers should send the form to their direct reports and request that they fill in the employee-related sections and return it to him or her for completion. The form itself, as well as detailed instructions, are available on the FAS HR website.

7. Can I sign the form electronically? Or do I have to print it and sign it?
   You can sign the template electronically by typing your name on the signature line. Also, when the form is uploaded into PeopleSoft, both the manager and the direct report will be prompted to confirm/acknowledge the final form.
8. **What do I do with the completed form?**
Managers should upload a copy of the completed form to PeopleSoft for record keeping. Upload instructions are available [here](#). FAS administrative deans and leaders will be tracking progress of completed reviews in their divisions and units.

**Questions relating to uploading the form**

9. **I see comment boxes in the PeopleSoft screen I am uploading the form to, do I need to enter comments there?**
Managers and employees should disregard the comment boxes in PeopleSoft. Please note, from a cross University standpoint, we are still in a pilot year, so not all system “kinks” have been worked through. All managers need to do is upload the completed form and share with the employee.

10. **Do managers really need to click “share w/ employee” in PeopleSoft if the staff member has already signed the form?**
Yes, managers should “share” and staff members should “acknowledge” the form in PeopleSoft as the system of record.

11. **Can staff members upload the completed form, instead of the manager?**
Only managers can upload the completed form.

12. **What if my employee is not available or willing to acknowledge the form in PeopleSoft?**
The manager can click on “override acknowledgement” in the upper right hand corner of the PeopleSoft performance review screen. There will be a pop up box asking the manager to indicate “employee not available” or “employee refused.” Please note that: there is no separate comment box associated with overriding an acknowledgment; the staff member will receive an automated email letting them know that their performance document is now “complete.”