

FY20 Performance Management FAQs

General Questions

- **What is the timeline for performance management?** Performance reviews should be completed by July 31, 2020.

The FAS annual performance review cycle for FY20 includes:

- Goal Setting: July 1, 2019 to November 30, 2019
 - Ongoing Coaching Conversations: July 1, 2019 to July 31, 2020
 - Summary Conversation: May 1, 2020 to July 31, 2020 (summary conversations can start earlier if needed)
- **Even if I've been having ongoing performance conversations, do I still need to have a year-end performance conversation?** Yes. While this new approach encourages managers to have continuous performance conversations with staff during the year, a short closing conversation is still called for.
 - **When should I have my performance review completed?** PeopleSoft indicates that the employee self-evaluation is due on May 31, 2020 and the manager review is due by June 30, 2020. Please note that this is a University-wide deadline, and Harvard schools and units may set their own deadlines. FAS has set a deadline of July 31 to have all self-evaluations and performance reviews completed in PeopleSoft. However, it is encouraged that employees and managers have performance conversations and work on evaluations before the end of July
 - **My department has a different deadline. Which one should I use?** Individual departments and units may set their own timeframes for performance evaluations. If your own unit or division has set its own deadline, we encourage you to follow that timeframe.

Assessments

- **Why do we have performance ratings?** [In order to comply with the Massachusetts Equal Pay Act \(MEPA\)](#), the University will return to a merit system framework including ratings.
- **Why do I need to focus on the assessment description instead of the assessment label?** A few years ago, FAS HR conducted a performance exercise for FAS managers, leaders, and staff at all levels. Participants were asked to estimate the percentage of staff in their units who performed at each performance level based on the assessment descriptions. Regardless of the audience, participants consistently estimated a normal bell curve of performance based on the descriptions. We continue to encourage staff to focus on the performance descriptions (not on the labels).
- **What are this year's performance ratings and labels?** Harvard-wide performance ratings are available [online](#).

- **Do all staff receive a performance rating?** Yes. All FAS staff, including HUCTW staff, receive a performance rating from their manager.

PeopleSoft

General Functionality

- **How do I access the FY20 performance review in PeopleSoft?**
From the PeopleSoft landing page, click on the “My Performance” tile and then select the annual review with an end date of 6/30/20. Click along the tabs to become familiar with the different sections of the document. Note that instructions for each tab are included at the top of that tab.
- **Does the “Start Sharing” button share the entire document (all tabs) or just the current tab?**
This feature shares the entire document, not specific tabs. The staff member will be able to edit the document even while it’s being shared. Overall ratings, competencies, and attachments are not shared *until* the manager clicks on the “Complete Annual” button.
- **How can managers and staff members use the sharing function throughout the annual performance management cycle?** We recommend that managers and staff members use this function to keep track of conversations and feedback throughout the year. During the annual review, the manager can click on “Stop Sharing,” write their year-end comments, and then start sharing again when they’re ready to communicate that information with their employee. Similarly, the employee can turn off sharing to write their self-assessment and turn sharing back on once they’re ready to discuss it with their manager. Documents also continue to be editable with the sharing function turned on.
- **Is it possible for a staff member to share comments with a manager while the manager has turned off their sharing?** Yes. The start/stop sharing function gives users control over their own comments. An employee would be able to share their documents with a manager, without the manager sharing their comments back, and vice versa.
- **Does the “Complete Annual” function share comments?** It does, but at that point the document becomes read-only and is no longer editable unless it’s reopened. In order to share comments while still making edits to the documents, the staff member and/or manager would have to click on “Start Sharing.”
- **I’m having issues with the “sharing” feature, which doesn’t seem to work. Can you help?** For the “sharing” feature to work, both the employee and manager documents need to be in the same status. For example, if both documents are “in progress” then the sharing function will work. If one document is “in progress” and the other is “complete,” then the sharing function will not work until both documents are “complete.”
- **Where can I review information about performance management in PeopleSoft?** Information for completing all steps of performance review in PeopleSoft are available on the “Instructions” tab.

Priorities

- **Where do I document my FY20 priorities?** Staff members should have a conversation with their manager about their priorities (goals) and professional development areas for FY20. Then staff members should document this conversation under the “Priorities” tab.

Self-Evaluation

- **Where do I write my self-evaluation?**
In PeopleSoft, click on the “Summary” tab and enter your self-assessment in the “employee comments” section.

Feedback

- **How does the “Feedback” tab work?**
 - **For Staff:** Click on the “Feedback” tab. To select reviewers, use the “Steps and Tasks” panel to the left of the screen.
 - **For Managers:** To invite reviewers for your staff member, use the “Steps and Tasks” panel on the left side of the screen. Reviewer feedback is only visible to the manager, regardless of whether the manager has clicked “start sharing” or not. Feedback is only ever visible to the manager.
- **Can a manager customize questions in the “Feedback” tab?** No, the feedback questions are not editable. If managers want to ask more specific questions, they can opt to reach out for feedback via email or in person.

Completing the Annual Review

- **Can the staff member see the rating that is entered prior to the “Complete Annual” button being clicked?** No, they cannot. The overall rating is hidden until the manager clicks on “Complete Annual.”
- **Can a staff member enter a “final comment” after the manager has hit the “Complete Annual” button?** Yes, employees will be able to do that.
- **Will managers still be able to acknowledge on behalf of staff member if needed?** Managers will be able to acknowledge on behalf of a staff member if needed, such as for leaves of absence or departed staff.
- **I can’t see my manager’s shared comments anymore. What happened?** If an employee clicks “Complete Annual,” they will lose the ability to see their manager’s shared comments. If that happens before an employee is ready to submit their self-evaluation, their manager or ePerformance administrator will have to reopen the self-evaluation.
- **My manager let me know that they uploaded an attachment to my performance document in PeopleSoft, but I can’t see it. How can I view the attachment?** A staff member can only view attachments uploaded by their manager if the manager has clicked the “complete annual” button. If the manager is still actively working on the performance review and has not formally completed it in PeopleSoft, the staff member will not be able to view the attachment.