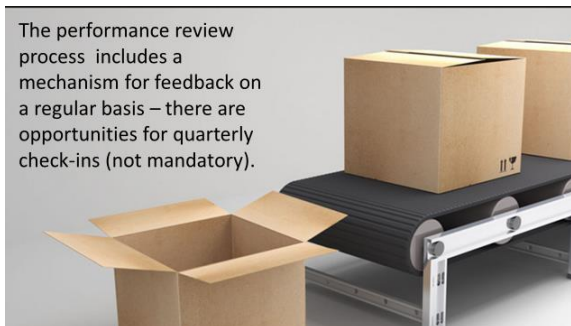


## Q1 (First Quarter/March)

### Quarterly Feedback

The performance review process includes a mechanism for feedback on a regular basis – there are opportunities for quarterly check-ins (not mandatory).



The form is available to the employee and supervisor each quarter.

If neither the employee nor the supervisor accesses (open and work on) the review form, the form will automatically move along throughout the year. The employee and supervisor will receive an email each quarter when the review form is available.

On-going feedback is important and a best practice, however, the quarterly review form is optional.

## It's a process, not just a form!

**Objectives**  
Dec 2018 –  
Jan 2019

**Q1**  
Mar 2019

**Mid Year**  
June 2019

**Q3**  
Sept 2019

**Year End \***  
Dec 2019

### Performance Review Process

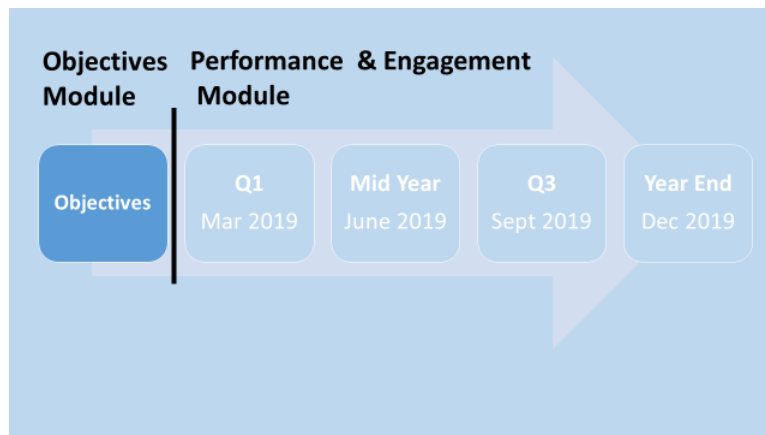
During the fall and early in the New Year, employees and supervisors determine and create an objective or multiple objectives. A minimum of one objective is required for the upcoming calendar year. Five is the maximum number of objectives.

There is an opportunity for the employee and Supervisor to report and review the objective(s) quarterly, however, it is not required.

The mid-year review is strongly encouraged and completion rates will be recorded. Finally, the Year-End review is required and the completion rates will be reported.

Questions? Email [hr@olemiss.edu](mailto:hr@olemiss.edu)

## Objectives



A minimum of 1 (one) objective is required for an employee and the program will allow for up to 5 (five) objectives. The objectives are managed in the “Objectives” module.

The objective(s) are included in the year-long performance review process. The objectives account for 25% of the overall review rating at the end of the year.

## Starting the Review Process

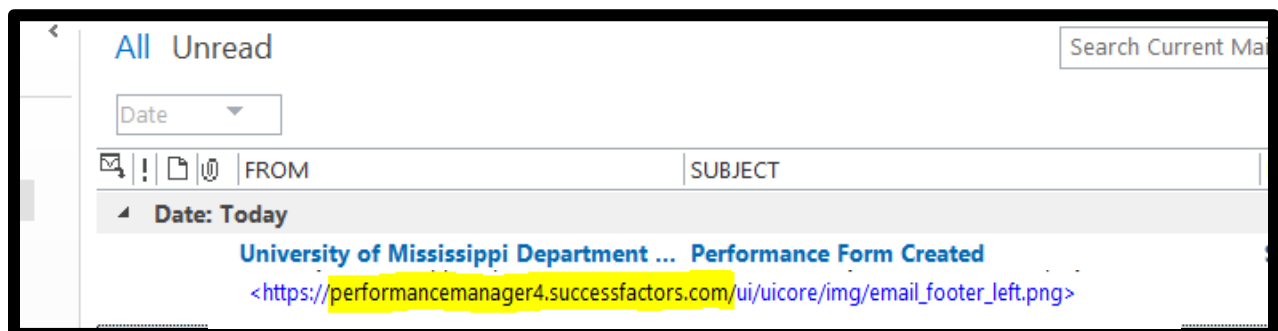


First report of the objectives occurs in March.

For Executive, Professional, Clerical, and Technical/Paraprofessional positions (EE01, EE03, EE04, and EE05) the employee kicks off the form.

## Email Notification

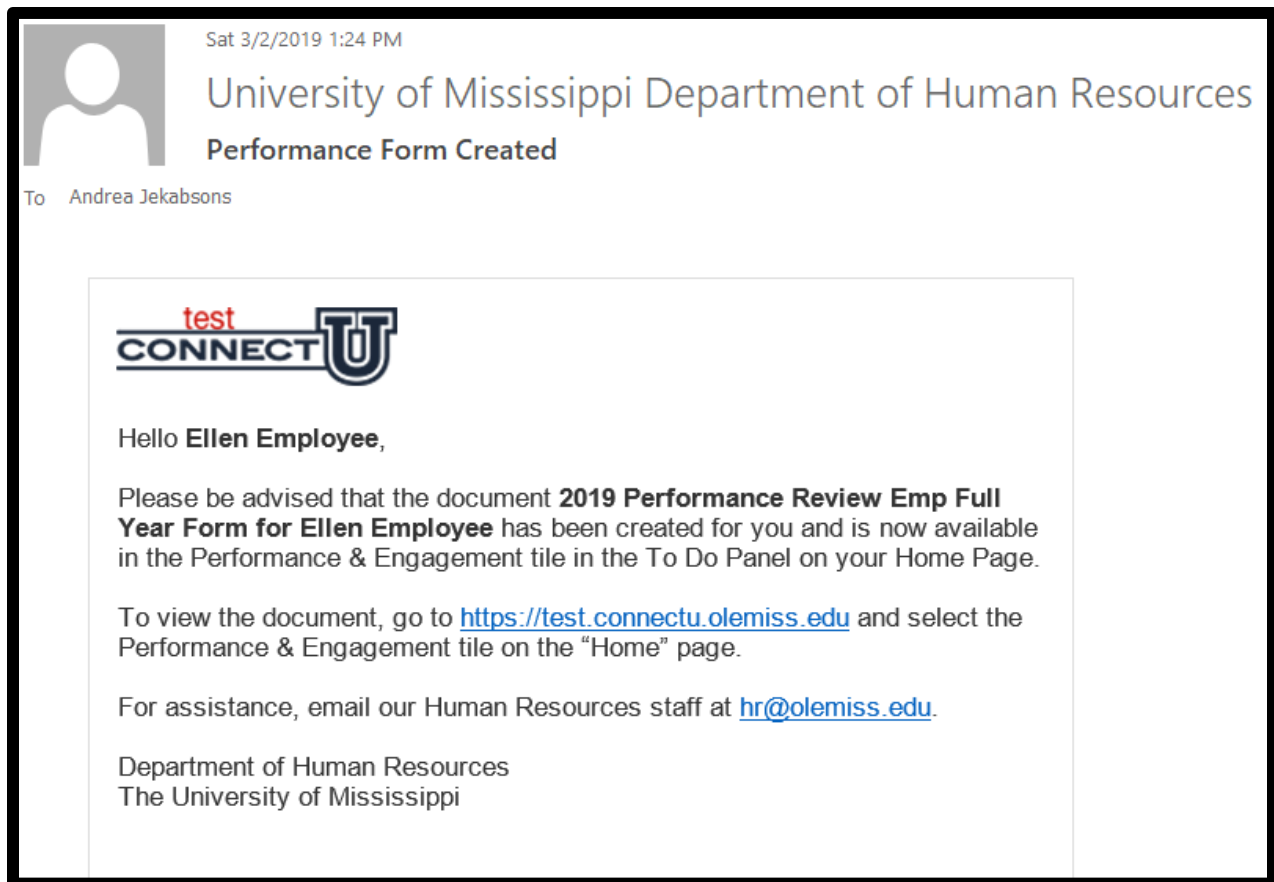
When the form is launched and made available to the employee, the employee will receive an email with the details and the link for [connectu.olemiss.edu](https://connectu.olemiss.edu).



This is not SPAM.

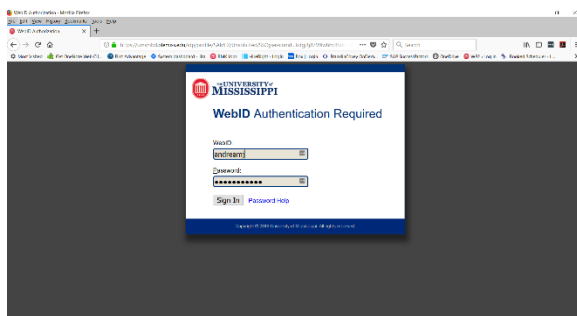
Questions? Email [hr@olemiss.edu](mailto:hr@olemiss.edu)

## SAMPLE Email



The address for the portal for internal users (current regular, eligible University employees) is connectu.olemiss.edu (or <https://connectu.olemiss.edu>).

## Logging In



The program is single sign-on (SSO)\*.

Enter your webid (not your email address, exclude @olemiss.edu) and password.

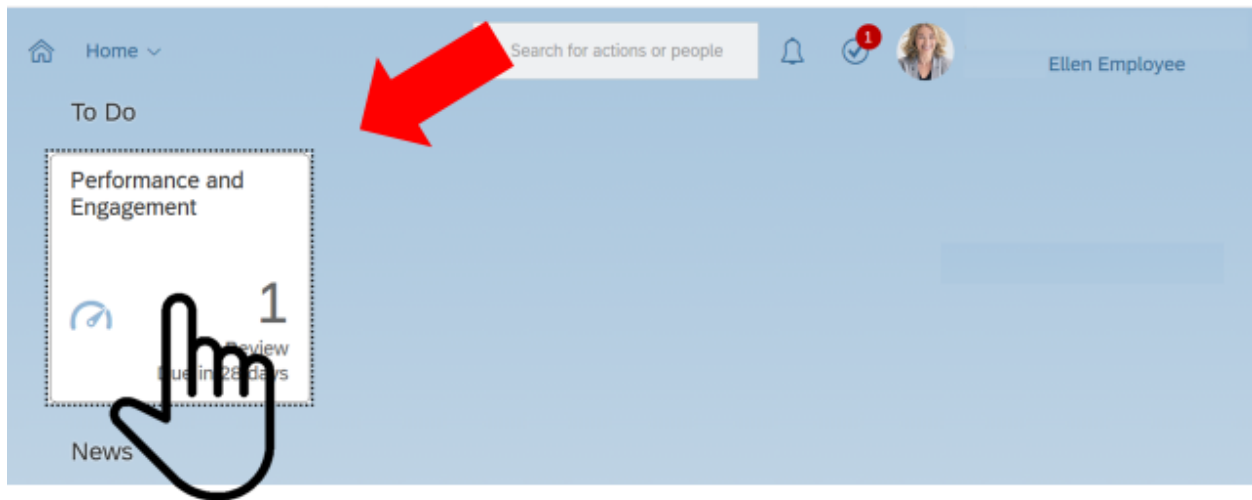
\* Single sign-on (SSO) is a property of access control of multiple related, yet independent, software systems. With this property, a user logs in with a single ID and password to gain access to a connected system or systems without using different usernames or passwords.

Questions? Email [hr@olemiss.edu](mailto:hr@olemiss.edu)

## “Performance and Engagement” Tile

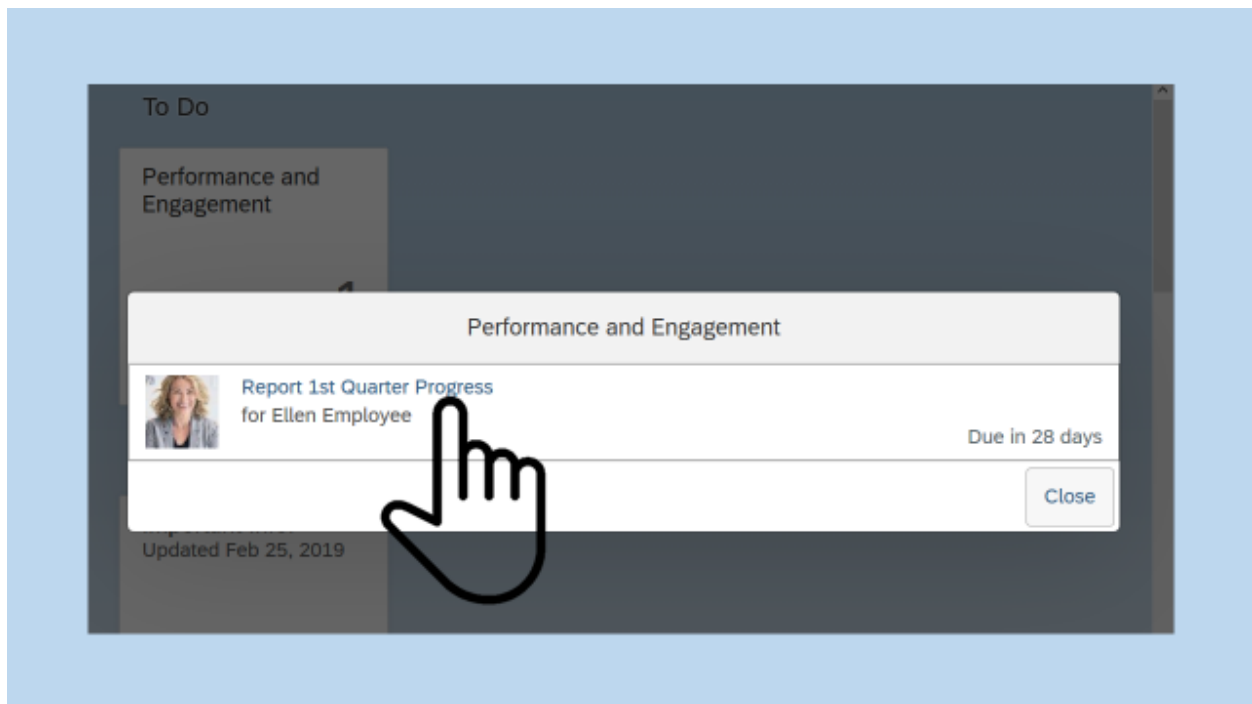
Once the review submission cycle begins, the employee will find the task in the “To Do” section of the connectU landing page.

The task is included within the “Performance & Engagement” tile. Click the “Performance and Engagement” tile.



## Link to open the “1<sup>st</sup> Quarter Progress” review Form

Click the link, “Report 1<sup>st</sup> Quarter Progress”



## About the Form

The Route Map indicates the current step of the process.

Click on the information icon, [i], to the right of the step for a description of the step.

**About the Form**

Back to: To-Dos

2019 Performance Review Emp Full Year Form for Ellen Employee

Ellen Employee

1 Incomplete Items

Route Map Introduction Employee Information Instructions About Comments More ▾

**Route Map**

Due 04/01/2019  
1 Employee Reports Progress for Q1 [i] — 2 Supervisor Reviews Progress for Q1 [i] — 3 Employee for Mid-Year

Introduction

Welcome to the ongoing process. This is a calendar year. It is not just a form, it is a process. This process is tracked and feedback is provided throughout the year.

## Required Items to submit the review form

Back to: To-Dos

2019 Performance Review Emp Full Year Form for Ellen Employee

Ellen Employee

1 Incomplete Items

Route Map Introduction Employee Information Instructions About Comments More ▾

**Route Map**

Due 04/01/2019  
1 Employee Reports Progress for Q1 [i] — 2 Supervisor Reviews Progress for Q1 [i] — 3 Employee for Mid-Year

Introduction

Welcome to the ongoing process. This is a calendar year. It is not just a form, it is a process. This process is tracked and feedback is provided throughout the year.

Incomplete Items indicates the number of incomplete, required items for this step.

## Employee Information

2019 Performance Review Emp Full Year Form for Ellen Employee

Ellen Employee 1

Route Map Introduction Employee Information Instructions About Comments Performance Objectives More

Introduction

Welcome to the ongoing performance review plan for this calendar year. It is not just a form, it is a process. This process ensures performance is tracked and feedback is provided throughout the year.

Less

Employee Information

The key information is obtained directly from the employee's current SAP record.

First Name	Ellen	Title	Analyst III
Last Name	Employee	Department	N/A
Hire Date		Supervisor	Melissa Manager

Review the "Employee Information" for accuracy.

The key information is obtained directly from the employee's current SAP record.

### Listed Supervisor and Organization Chart

If the reporting structure must be updated, the department manager or head must email [hr@olemiss.edu](mailto:hr@olemiss.edu).

## Instructions

Instructions are available for both the employee and the supervisor to reference.

2019 Performance Review Emp Full Year Form for Ellen Employee

Ellen Employee 1

Route Map Introduction **Employee Information** Instructions About Comments Performance Objectives More

Instructions

Instructions

Q1 and Q3: Comments for each objective (individual goals) and each competency (mid-year) are optional and an overall comment is required to process the form.

Mid-Year Review: Employees and supervisors have an opportunity to comment on all of the objectives and competencies during the mid-year performance review. Comments for each objective (individual goals) and each competency are optional.

Year-End Review: The employee will self-rate the performance as either "Needs Improvement," "Successful," or "Excellent" for all of the objectives and competencies. Additional comments are optional. The supervisor will rate the performance as either "Needs Improvement," "Successful," or "Excellent" for all of the objectives and competencies during the year-end performance review. Comments for each objective (individual goals) and each competency are optional and an overall comment is required to process the form.

Less

Questions? Email [hr@olemiss.edu](mailto:hr@olemiss.edu)

## About Comments

Use the "Comments" box to journal progress throughout the year. This same box will be used to add comments each quarter. Include the date with each comment.

The screenshot shows two sections of a performance review form. The first section, titled "About Comments", contains the instruction: "Use the 'Comments' box to journal progress throughout the year." The second section, titled "Performance Objectives", contains three paragraphs: "This section includes the established objectives (individual goals) that were agreed upon by maintained in the supervisor's 'Objectives' module.", "Edits to the employee's objectives must be maintained in the 'Objectives' module. To edit the status indicator, click on the edit icon (pencil).", and "This is an opportunity for the employee to report progress on the objectives and for the supe".

The established objective(s) is available for the employee to comment on.

The screenshot shows the "2019 Performance Review Emp Full Year Form for Ellen Employee". The "Performance Objectives" section is highlighted with a red box. It contains the following text: "Objectives", "Create a system for communicating on UMToday regularly and Instagram and tracking the number of hits and comments (for Instragram).", "Two timely and relevant posts a month with data collected for each post. Provide report at the the end of year, with suggestion for changes and improvements.", and "Employee Progress Comments". A green "On Track" button is visible in the top right corner of the red box. Below the red box is a text area for comments with a rich text editor toolbar.

## 2019 Performance Review Emp Full Year Form for Ellen Employee

Changes saved. Actions

Ellen Employee 1

0

Route Map Introduction Employee Information Instructions About Comments Performance Objectives More ▾

Create a system for communicating on UMToday regularly and Instagram and tracking the number of hits and comments (for Instagram).

Two timely and relevant posts a month with data collected for each post. Provide report at the the end of year, with suggestion for changes and improvements.

Employee Progress Comments

**B I U** | | | | | | | | | | Size | | A-z |

I am off to a great start and entering submitting timely and relevant UM posts monthly. - March 1, 2019

Remember, use the "Comments" box to journal progress throughout the year.

This same box will be used to add comments each quarter. Include the date with each comment.

For example: "I am off to a great start and entering submitting timely and relevant UM posts monthly. - March 2019"

## Objective Details

Any comments that were added in the objectives module are also included below each objective.

2019 Performance Review Emp Full Year Form for Ellen Employee

Actions

Ellen Employee 1

0

Route Map Introduction Employee Information Instructions About Comments **Performance Objectives** More ▾

**B I U** | | | | | | | | | | Size | | A-z |

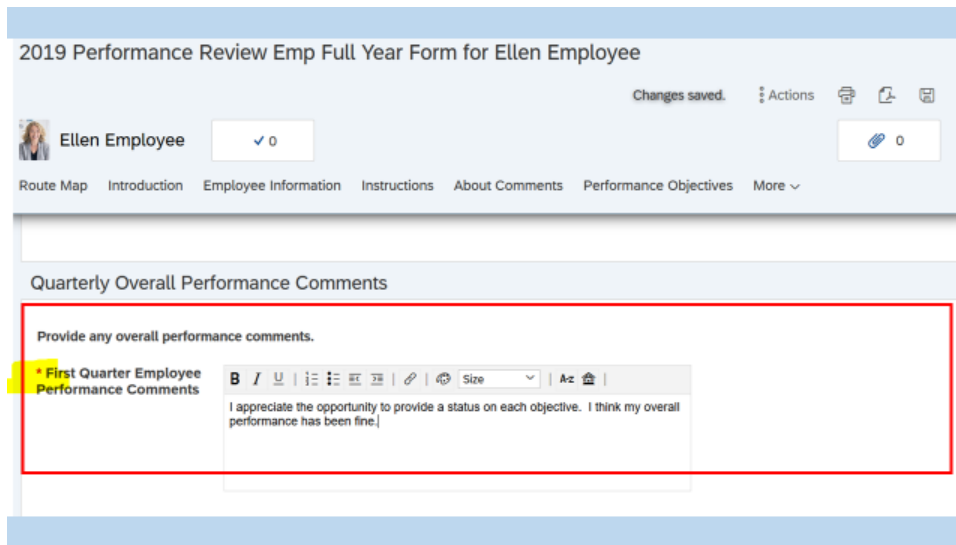
I am off to a great start and entering submitting timely and relevant UM posts monthly. - March 1, 2019

Objective Details Additional Details

Start Date	01/01/2019	Due Date	12/31/2019
Status	On Track	Comments	1. Ellen Employee 03/04/2019 This seems relevant and specific to our department goals. Thanks! I look forward to working on this objective.



## Quarterly Overall Performance



2019 Performance Review Emp Full Year Form for Ellen Employee

Changes saved. Actions

Ellen Employee 0

Route Map Introduction Employee Information Instructions About Comments Performance Objectives More

Quarterly Overall Performance Comments

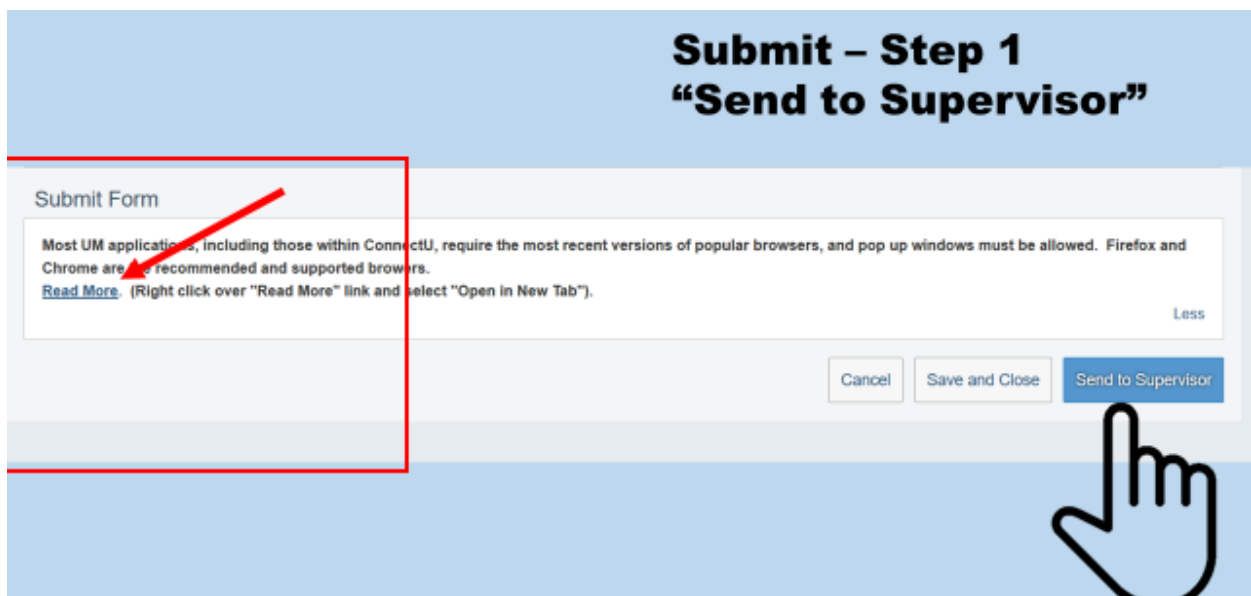
Provide any overall performance comments.

\* First Quarter Employee Performance Comments

I appreciate the opportunity to provide a status on each objective. I think my overall performance has been fine.

Below the objective and comment box are “Quarterly Overall Performance Comments” section.

This section is the only thing that is technically required.



**Submit – Step 1**  
**“Send to Supervisor”**

Submit Form

Most UM applications, including those within ConnectU, require the most recent versions of popular browsers, and pop up windows must be allowed. Firefox and Chrome are the recommended and supported browsers.  
[Read More.](#) (Right click over "Read More" link and select "Open in New Tab").

Less

Cancel Save and Close Send to Supervisor

### Submit Form (allow for pop-up window)

Most UM applications, including those within connectU, require the most recent versions of popular browsers, and pop-up windows must be allowed.

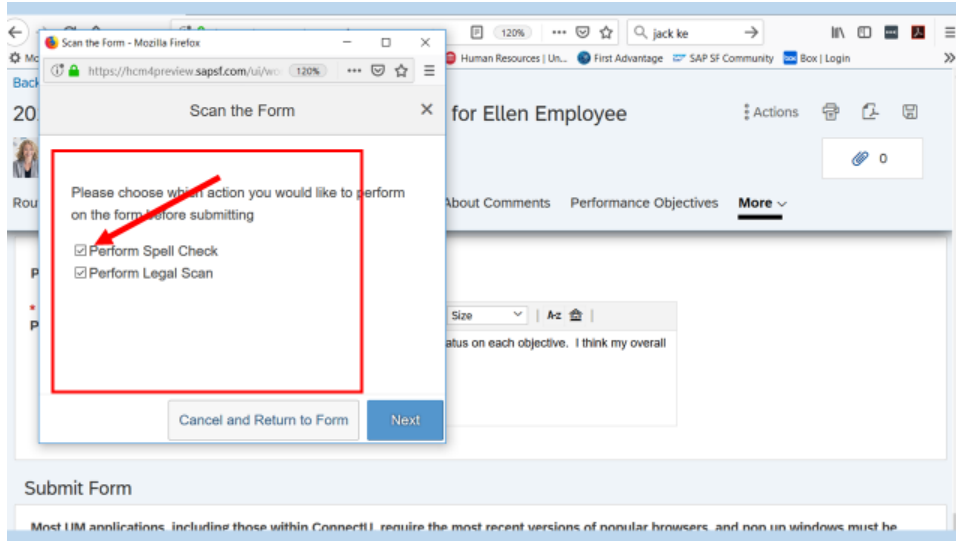
Firefox and Chrome are the recommended and supported browsers.

[Read More.](#) (Right click over "Read More" link and select "Open in New Tab").

## Scan the Form

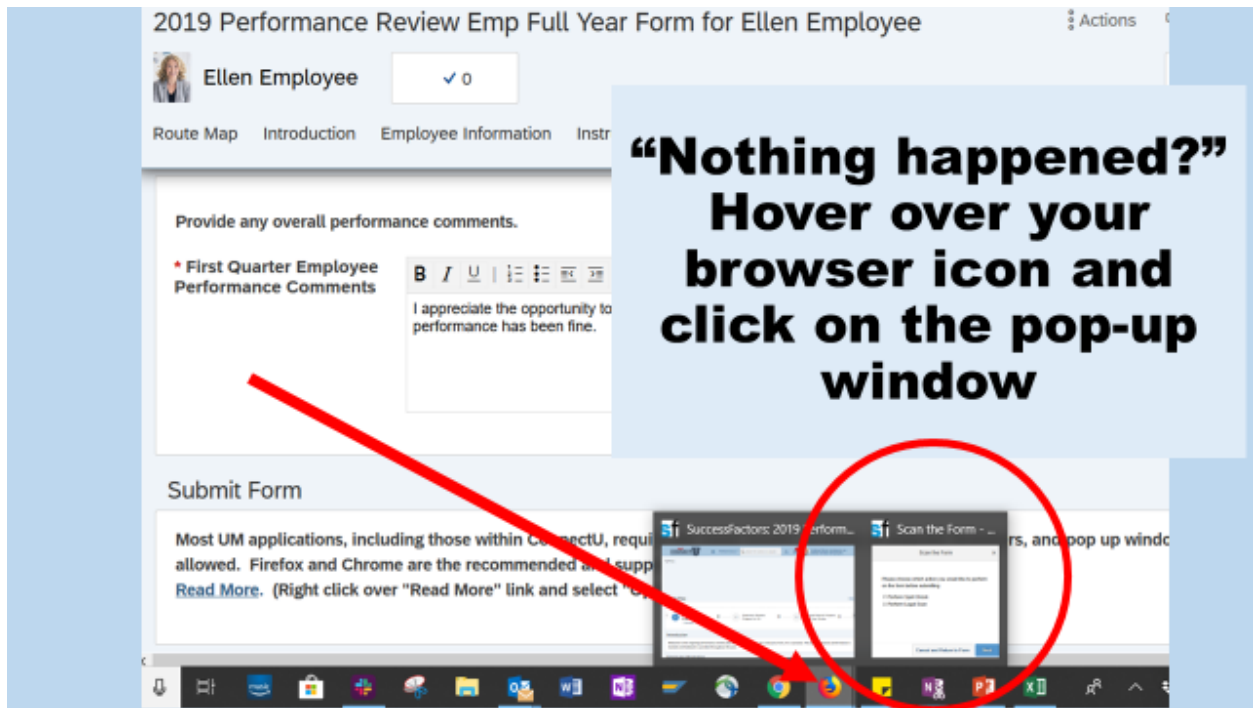
Click “Next” to perform a Spell Check & Perform Legal Scan.

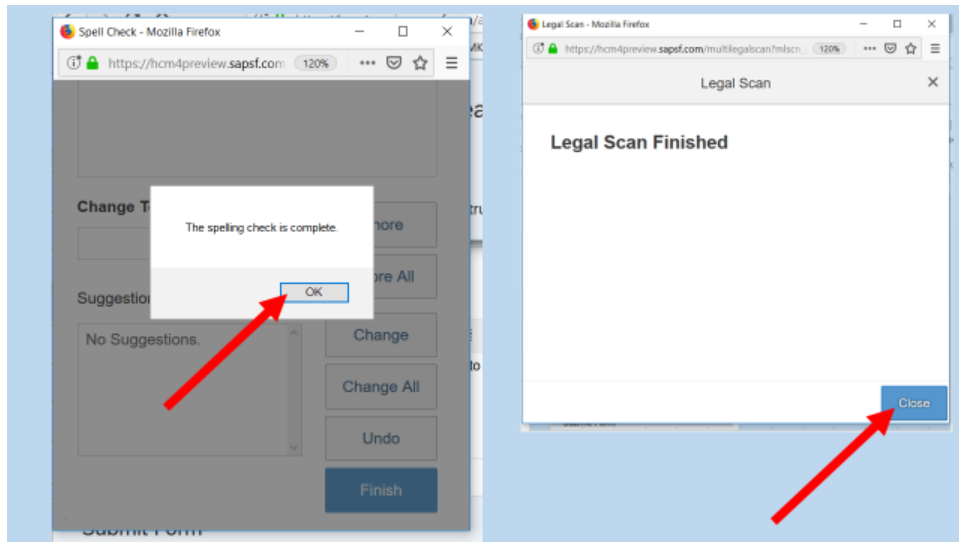
Or uncheck the boxes to disable the scan.



## Troubleshooting – “Nothing happened when I submitted the form”

If you do not see the pop-up box, hover over your browser icon and select the pop-up window.





Click "OK" to close the Spell Check window  
 Click "Close" to close "Legal Scan Finished" window.

## Email Notification Comments

The employee *may* include a personal note that will be added to the email notification that the supervisor will receive.

This is optional. The additional comment is not required.

**Optional Comment to be added to the automatically generated email**

You're about to send this form to the next person(s) specified in the workflow.

Forward Form to Melissa Manager

Email Notification Comments

YOU MAY ADD A PERSONAL EMAIL NOTE. THIS IS OPTIONAL

Cancel & Return to Form Send to Supervisor

**Send to Supervisor** ⓘ

You're about to send this form to the next person(s) specified in the workflow.


**Forward Form to Melissa Manager**

Email Notification Comments

**YOU MAY ADD A PERSONAL EMAIL NOTE. THIS IS OPTIONAL**

**Submit – Step 2  
“Send to Supervisor”**

Cancel & Return to Form   Send to Supervisor



An email with standard information and instructions will be sent to the supervisor once the employee clicks “Send to Supervisor” a second time.

**Don't forget to click “Send to Supervisor” again.**

## En Route Folder

The forms are always available to reference in your “My Forms” section. Select “Performance” from the drop down menu, next to the “Home” icon.

**An employee may double check by looking in the performance “My Forms” section, En Route folder.**

**My Forms**

All Forms  
In Progress  
Inbox  
**En Route**  
Completed

Items per page: 10   Page 1 of 1   Showing 1–1 of 1

Display Options

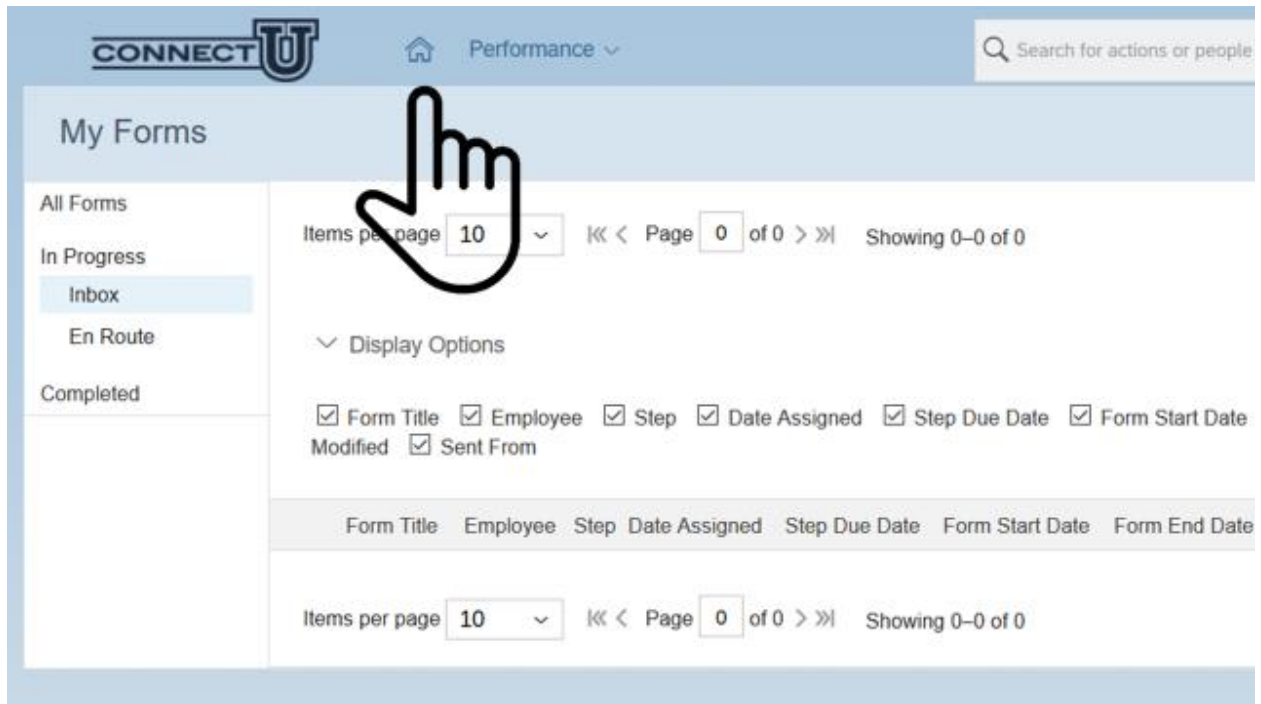
☒ Form Title   ☒ Employee   ☒ Step   ☒ Currently With   ☒ Step Due Date   ☒ Form Start Date   ☒ Form End Date   ☒ Form Due Date   ☒ Last Modified

Form Title	Employee	Step	Currently With	Step Due Date	Form Start Date	Form End Date	Form Due Date ↑	Last Modified	Action
2019 Performance Review Emp Full Year Form for Ellen Employee	Ellen Employee	Supervisor Reviews Progress for Q1	Melissa Manager	04/16/2019	01/01/2019	12/31/2019	03/31/2020	03/04/2019	[i]

Items per page: 10   Page 1 of 1   Showing 1–1 of 1

## Go Home

To return to the “Home” page, select the home icon at the top of the page.



The screenshot shows the 'CONNECT U' interface. At the top, there is a navigation bar with a home icon, a 'Performance' dropdown, and a search bar labeled 'Search for actions or people'. Below the navigation bar is a section titled 'My Forms'. On the left side of 'My Forms', there is a sidebar with links: 'All Forms', 'In Progress', 'Inbox' (highlighted), 'En Route', and 'Completed'. The main content area of 'My Forms' shows a table of forms. Above the table, there are controls for 'Items per page' (set to 10) and 'Page 0 of 0'. Below these controls is a 'Display Options' section with checkboxes for 'Form Title', 'Employee', 'Step', 'Date Assigned', 'Step Due Date', 'Form Start Date', 'Modified', and 'Sent From'. The table header includes columns for 'Form Title', 'Employee', 'Step', 'Date Assigned', 'Step Due Date', 'Form Start Date', and 'Form End Date'. At the bottom of the table, there are again controls for 'Items per page' (set to 10) and 'Page 0 of 0'. A large hand icon is overlaid on the page, pointing to the home icon in the top navigation bar.

## Manager's Step

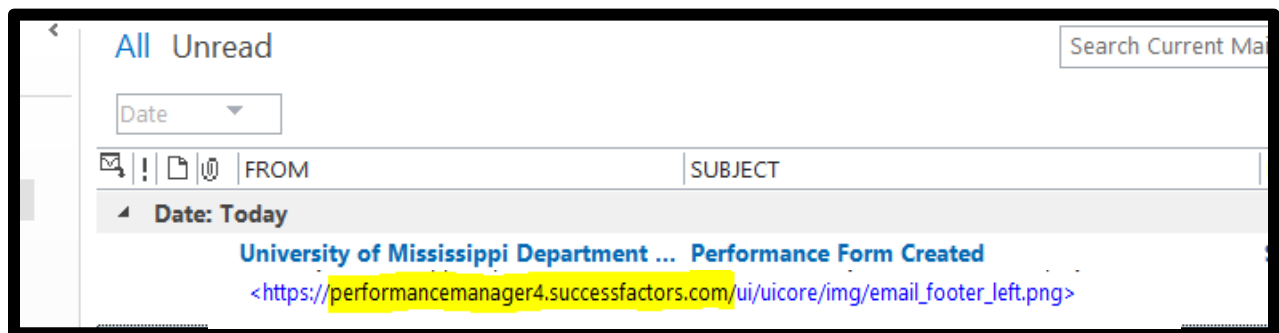
Melissa Manager reviews the progress of the objective and/or the overall performance.



Melissa Manager reviews the progress of the objective and/or the overall performance.

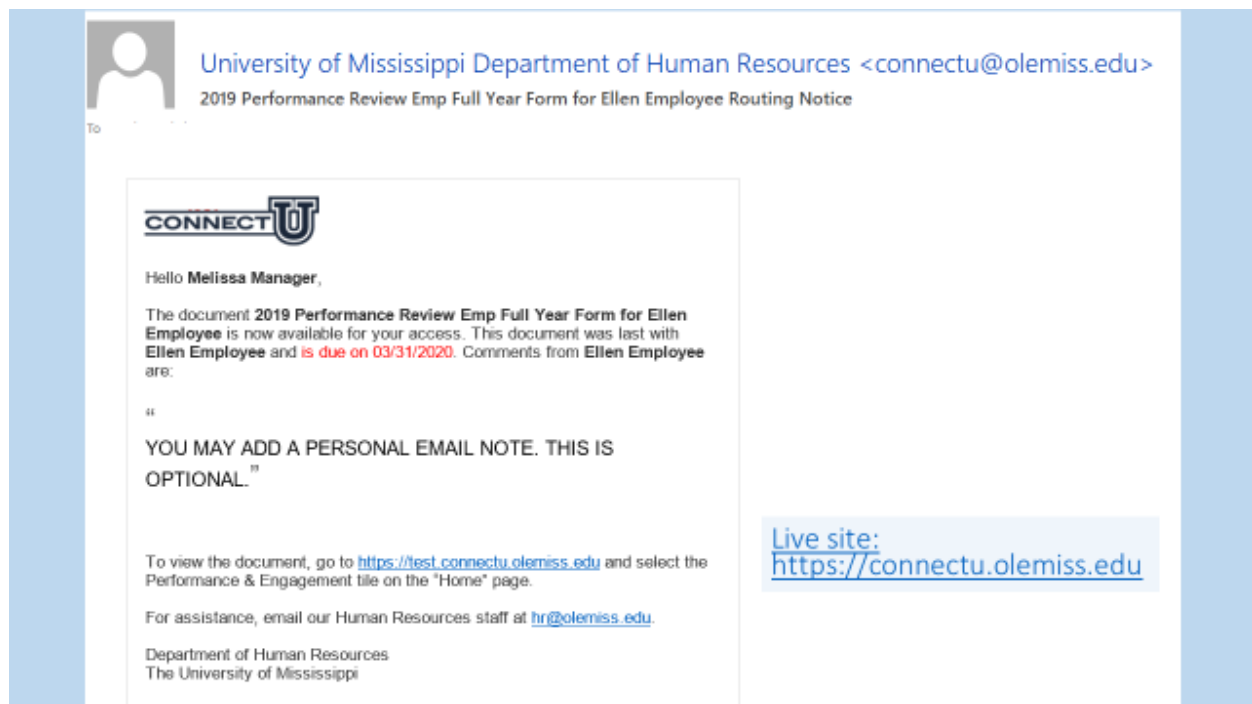
## Email Notification

When the form is made available to the supervisor, the supervisor will receive an email with the details and the link for [connectu.olemiss.edu](https://connectu.olemiss.edu).



This is not SPAM.

Email Sample:

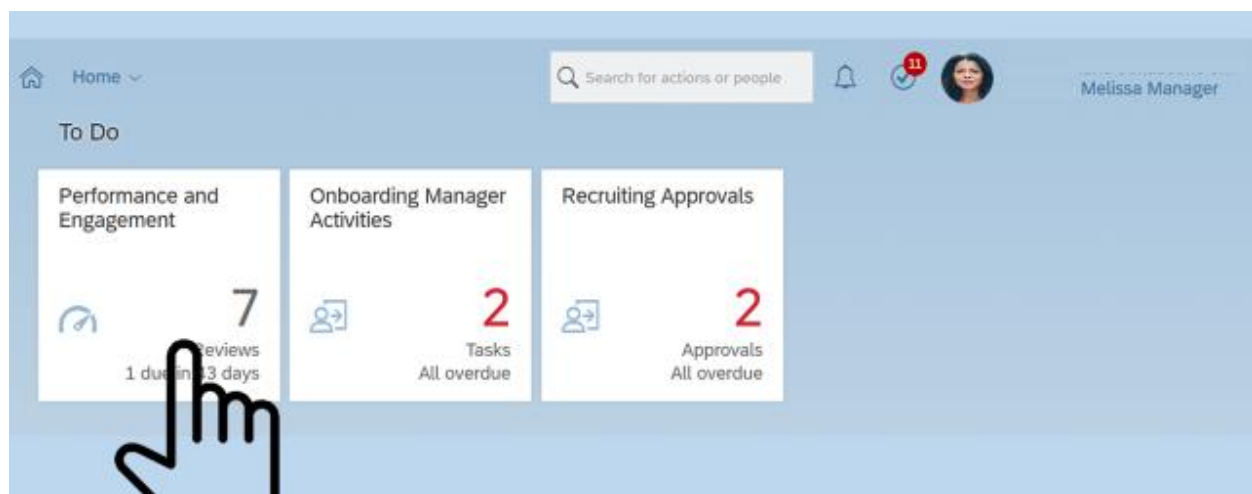


The live site is available at <https://connectu.olemiss.edu>

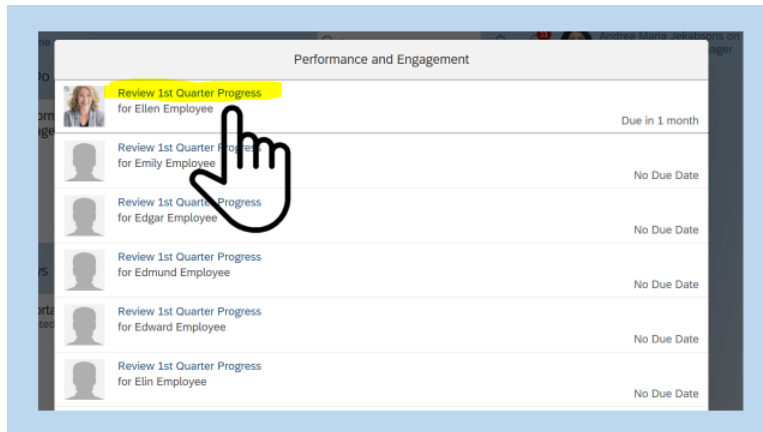
## "Performance and Engagement" tile on Home Page

The supervisor will find the task in the "To Do" section of the ConnectU landing page.

The task is included within the "Performance & Engagement" tile.



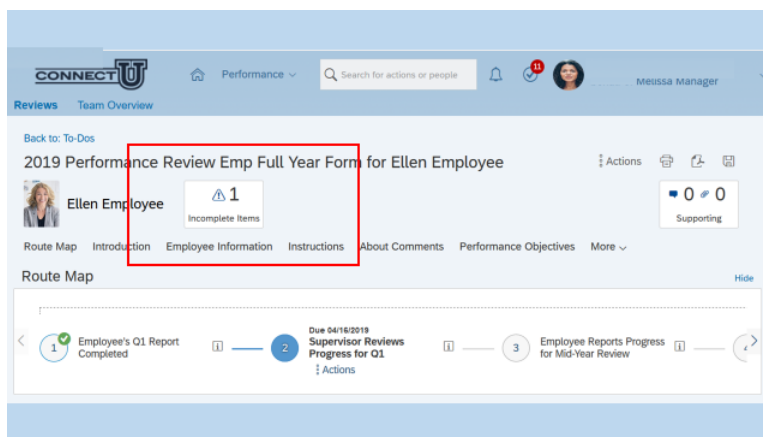
Questions? Email [hr@olemiss.edu](mailto:hr@olemiss.edu)



## Link to Review

Click the link, “Report 1<sup>st</sup> Quarter Progress.”

If there are multiple direct reports, they will all be listed here.



## Required Items to Submit the Form

Again, the objectives are available to comment on. However, only the overall comment is required *if* the supervisor opens the form.

## Performance Objectives

The supervisor may scroll down to the objectives.

This section includes the established objectives that were agreed upon by the employee and supervisor. These objectives are maintained in the “Objectives” module.

Edits to the employee’s objectives must be maintained in the “Objectives” module.

To edit the status indicator, click on the edit icon (pencil).

The employee’s progress comments are located to the right of the supervisor’s comment box.

This is an opportunity for the supervisor to review the progress and comment.



## Comment for Objective

The established objective(s) is available for the supervisor to comment on.

Remember, use the "Comments" box to journal progress throughout the year.

This same box will be used to add comments, include the date with each comment.

For example: "Thank you for work on this objective. I will keep an eye for the next two posts and look forward to reviewing the data at the end of the year - March 2019."

This comment section is not required.

## Objective 2

Changes saved. Actions



Ellen Employee

✓ 0

[Route Map](#) [Introduction](#) [Employee Information](#) [Instructions](#) [About Comments](#) [Performance Objectives](#) [Quarterly Overall Performance Comments](#) [More](#)

### Implement a department emergency plan

Plan implementation by the beginning of Fall 2019 (August 22nd); including developing the plan, reviewing plan with the Emergency Management Coordinator, and presenting the final plan to all impacted staff.

#### Supervisor Progress Comments

**B** *I* U | | **Az**

Please be mindful of the calendar and avoid waiting until the last minute to work on this objective. - March 2019

#### Review Details from Others

No comments were provided

#### Objective Details

#### Additional Details

**Start Date** 01/01/2019

**Due Date** 12/31/2019

**Status** Not Started

**Comments**  
1. Ellen Employee  
03/04/2019

I recognized that this is a very important objectives. Now that it is written down with a timeline, I am more likely to get it done.

## Objective 3

Changes saved. Actions



Ellen Employee

✓ 0

[Route Map](#) [Introduction](#) [Employee Information](#) [Instructions](#) [About Comments](#) [Performance Objectives](#) [Quarterly Overall Performance Comments](#) [More](#)

#### Objectives

Reduce response time for email inquiries from 48 hours to 24 hours by December 1.

Email response time should be less than 24 hours.

#### Supervisor Progress Comments

**B** *I* U | | **Az**

The department has been getting good feedback regarding our response times. Thank you for your efforts. - March 2019

#### Review Details from Others

No comments were provided

## Quarterly Overall Performance Comments

The quarterly overall performance comment is required. This provides the supervisor the opportunity to comment on the performance of the specific objective and/or the overall performance of the employee.

2019 Performance Review Emp Full Year Form for Ellen Employee

Changes saved. Actions

Ellen Employee ✓ 0

Route Map Introduction Employee Information Instructions About Comments More

Provide any overall performance comments.

First Quarter Employee Performance Comments

First Quarter Supervisor Performance Comments

I appreciate the opportunity to provide a status on each objective. I think my overall performance has been fine.

The performance on the objectives is solid. Thank you for those efforts. Please continue to work on reporting to work on time. Allow for ample time to park and walk to the office.

## Submit

Click “1<sup>st</sup> Quarter Progress Review Completed” again to submit the document.

2019 Performance Review Emp Full Year Form for Ellen Employee

Actions

Ellen Employee ✓ 0

Route Map Introduction Employee Information Instructions About Comments Performance Objectives More

Performance Comments

First Quarter Supervisor Performance Comments

overall performance has been fine.

The performance on the objectives is solid. Thank you for those efforts. Please continue to work on reporting to work on time. Allow for ample time to park and walk to the office.

**Submit – Step 1**

**“1<sup>st</sup> Quarter Progress Review Completed”**

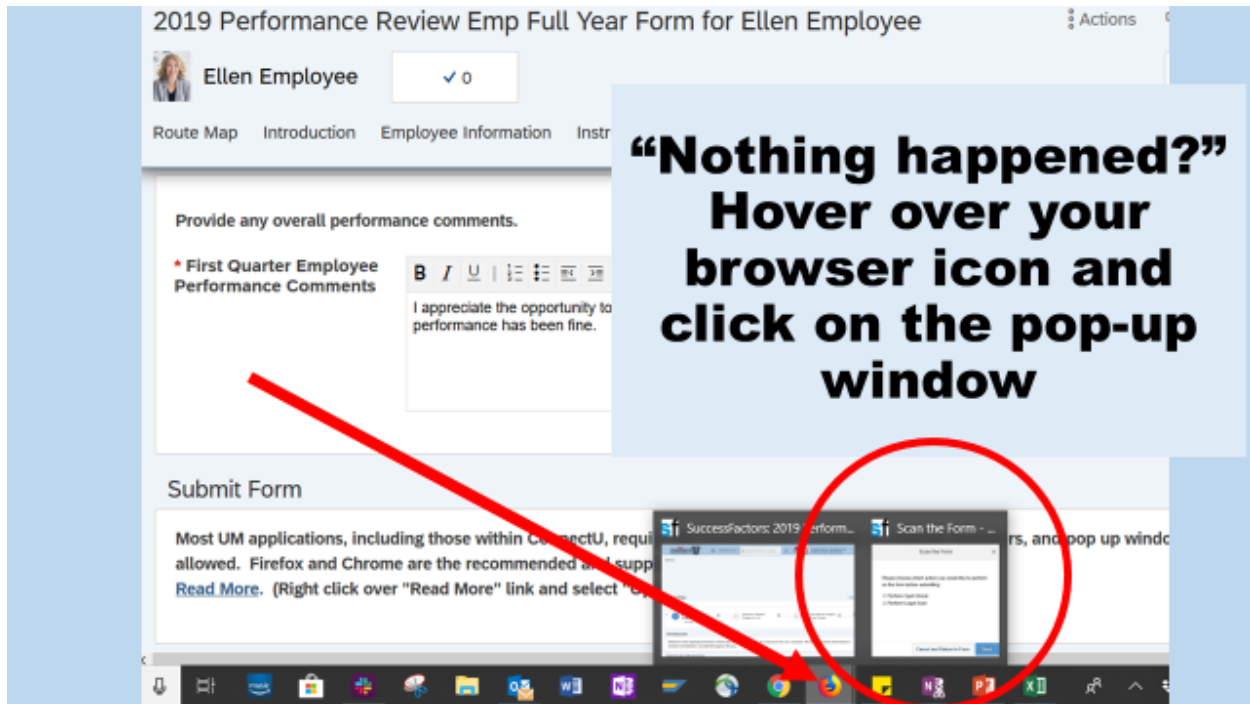
Submit Form

Most UM applications, including those within ConnectU, require the most recent versions of popular browsers, and pop up windows must be allowed. Firefox and Chrome are the recommended and supported browsers. [Read More](#). (Right click over “Read More” link and select “Open in New Tab”).

Cancel Save and Close Send Back to Employee **1st Quarter Progress Review Completed**

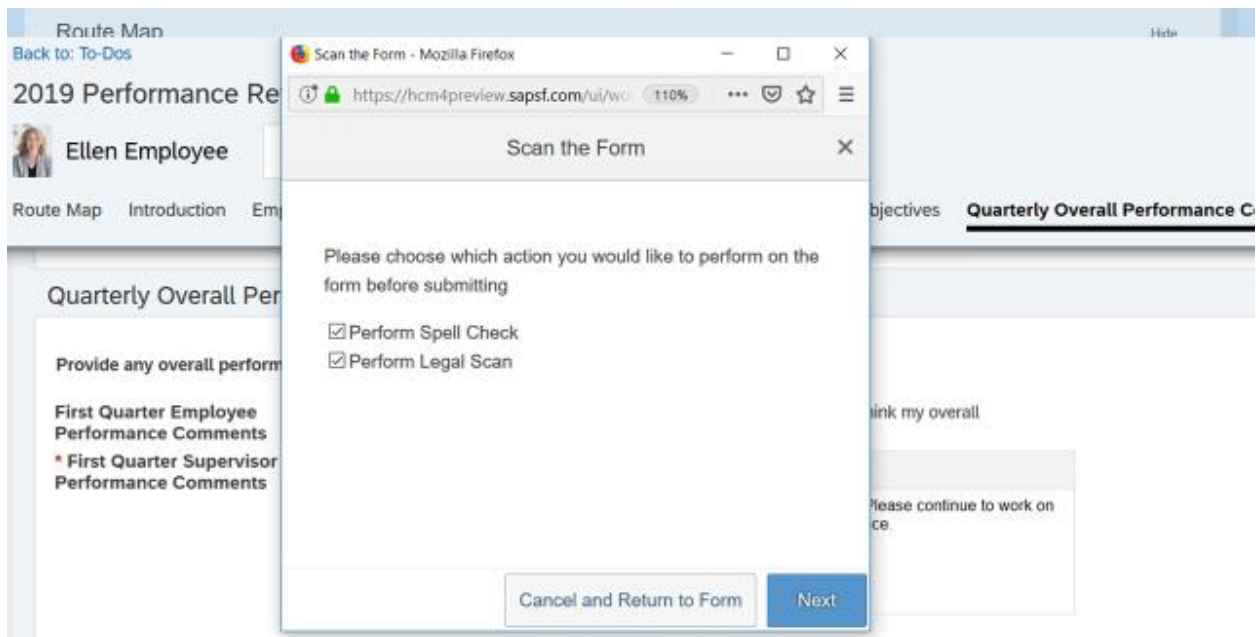
## Troubleshooting – “Nothing happened when I submitted the form”

If you do not see the pop-up box, hover over your browser icon and select the pop-up window.



### Scan the Form (pop-up window)

Follow the same steps, either enabling or disabling the Spell Check and Legal Scan.



## Submit

A personal email message may be added to the standard automatic, system generated email.

Don't forget to click "1<sup>st</sup> Quarter Progress Review Completed" again.

Route Map

1 Employee's Q1 Report Completed 2 Supervisor Reviews Progress for Q1 3 Employee Reports Progress for Mid-Year 4

### Submit - Step #2

#### 1st Quarter Progress Review Completed

You're about to send this form to the next person(s) specified in the workflow.

Forward Form to Ellen Employee

Email Notification Comments

Cancel & Return to Form 1st Quarter Progress Review Completed

## Inbox

Once submitting the form, the next screen displayed is the "Performance" page. Any additional forms will be displayed on this page as it defaults to the Inbox.

### Inbox

My Forms

All Forms In Progress In Route Completed

Items per page: 10 Page 1 of 1 Showing 1-6 of 6 All My Direct Reports

Display Options

Form Title	Employee	Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Sent From	Action
2019 Performance Review (Emp Full Year Form for Emily Employee	Emily Employee	Supervisor Reviews Progress for Q1	12/19/2018		12/19/2018	01/18/2019	01/18/2019	12/19/2018	Emily Employee	
test for training - supervisor for Edgar Employee	Edgar Employee	Supervisor Reviews Progress for Q1	01/14/2019		01/01/2018	12/31/2018	01/28/2019	01/14/2019	Andrea Maria Jakubsons	
2018 Performance Review Sup Full Year Form for Edmund Employee	Edmund Employee	Supervisor Reviews Progress for Q1	01/29/2019		01/29/2019	02/28/2019	02/28/2019	01/29/2019	Andrea Maria Jakubsons	
2018 Performance Review Sup Full Year Form for Edward Employee	Edward Employee	Supervisor Reviews Progress for Q1	01/29/2019		01/29/2019	02/28/2019	02/28/2019	01/29/2019	Andrea Maria Jakubsons	
2018 Performance Review Sup Full Year Form for Elin Employee	Elin Employee	Supervisor Reviews Progress for Q1	01/29/2019		01/29/2019	02/28/2019	02/28/2019	01/29/2019	Andrea Maria Jakubsons	
2019 Performance Review Sup Half Year Form for Samuel Supervisor	Samuel Supervisor	Supervisor Reviews Progress for Q3	02/26/2019		01/01/2019	12/31/2019	02/15/2020	02/26/2019	SF ADMIN	

Items per page: 10 Page 1 of 1 Showing 1-6 of 6 All My Direct Reports

## En Route

There is also an “En Route” option that will display the forms that are “en route” and whom the form is currently with.

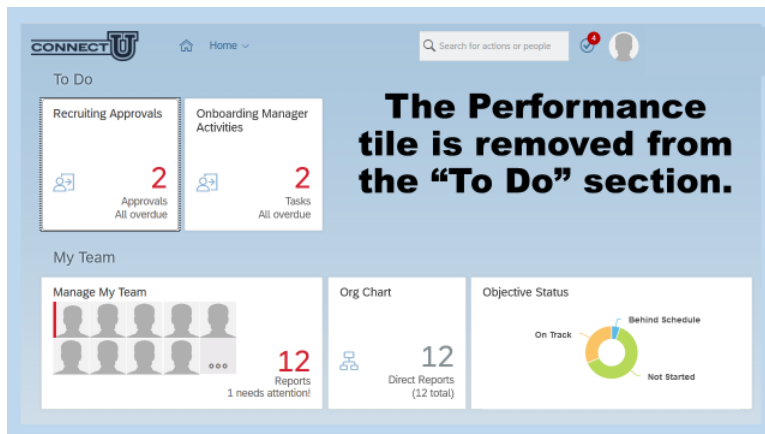
The performance review form may be viewed, however, the edits to the form will be “locked” until the next quarter.

Form Title	Employee	Step	Currently With	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Action
New Hire Checklist for Edgar Employee	Edgar Employee	HR Acknowledges Receipt of New Hire Checklist	Helen HR		10/09/2018	11/08/2018	11/08/2018	10/10/2018	[i]
2018 Performance Review Sup Full Year Form for Eugene Employee	Eugene Employee	Employee Acknowledges Review	Eugene Employee		02/17/2019	03/19/2019	03/19/2019	02/17/2019	[i]
2019 Performance Review Emp Full Year Form for Ellen Employee	Ellen Employee	Employee Reports Progress for Mid-Year Review	Ellen Employee		07/01/2019	01/01/2019	12/31/2019	03/03/2020	03/04/2019 [i]

## Go Home

To return “Home” select the home icon on the top of the page.

Form Title	Employee	Step	Currently With	Step Due Date	Form Start Date	Form End Date
2018 Performance Review Emp Full Year Form for Ellen Employee	Ellen Employee	Employee Reports Progress for Mid-Year Review	Ellen Employee		09/09/2018	10/01/2018



## Done

The Performance tile is removed from the “To Do” section when all of the forms have been processed.

## Additional Options on the Form

There are additional options including print, save as a PDF, and Save.

You can print the entire form or select portions of the form.







### **Completed First Quarter (Q1) Step**

That completes the first quarter report on objectives and review.

The mid-year review is the next step in June.

There is an opportunity for the employee and supervisor to report and review the objective(s) quarterly, however, it is not required.

The mid-year review is strongly encouraged and completion rates will be recorded.

Finally, the Year-End review is required and the completion rates will be reported.

## **Index**

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