

Senior Manager End of Year Review System Process Guidance

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VERSION HISTORY

Version	Date	Change Summary
1.0	May 2023	N/A
1.1	May 2024	Self-rating removed and calibration acknowledgement step added

Introduction

This guide will instruct you in the process of completing the Senior Manager End of Year Review form on HR Connect, both as a team member (reviewee) and a manager (reviewer).

The first section of the form '**Senior Manager End of Year Review Form 23/24**' will be open until 30th June for completion and submission of relevant sections by both the team member (reviewee) and their manager (reviewer).

The second section of the form '**Final Calibrated End of Year Review**' will be open from **8th to 28th August** for completion and submission by the manager (reviewer) once the final calibrated rating has been communicated by the calibration committee. Please **do not** record anything in this form until you have received the final calibrated rating and informed your team member.

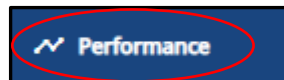
When inputting data into the review form/s, like any web-based system the page will eventually time out. Therefore, it is recommended that you either regularly save the form throughout the process to avoid loss of work or type up the information in a word document and copy and paste into the form when you are ready to submit.

Team Member (Reviewee): Completing your EOY Review

From the 1st of May the 'Senior Manager End of Year Review Form 23/24' will be available for completion in HR Connect.

Please note that this section needs to be completed and submitted first before the manager can complete and submit their part of the form.

Log into HR Connect Employee Self Service and click on 'Performance'.



Within the 'Review lifecycles' section, click on 'Senior Manager End of Year Review 23/24'

A screenshot of the 'Review lifecycles' section in HR Connect. It shows a table with columns for 'Lifecycle name', 'Start date', 'Current stage', and 'Stage target end date'. The first row is circled in red. There are also two buttons, 'All' and 'Current', at the top of the table.

Lifecycle name ↑	Start date	Current stage	Stage target end date
Senior Manager End of Year Review 23/24	01 May 2024	Employee inputs EOY comments	30 Jun 2024

Click on **'Generate'**.

< Back to Reviews

Senior Manager End of Year Review 23/24

Start

Senior Manager End of Year Review

Employee inputs EOY comments

Manager inputs EOY ratings and comments.

Senior Manager Calibrated Review Form

End

Employee inputs EOY comments

Target end date: 30 June 2024

Action responsibility:

Generate

Ensure that you read through the summary page. Click on **'Start'** to access and complete the form.

< Back to Reviews

Senior Manager End of Year Review Form 23/24

My End of Year Review (Reviewee)

End of Year Review (Reviewer)

Click here to return to the performance life cycle

Summary >

Reviewee Guidance

Ahead of your End of Year review conversation with your line manager, it is helpful to have completed a progress update against each of your individual objectives. If you would like a quick reminder on how to do this in the system, [click here](#).

Once you are ready to add your update for both WHAT you have achieved and HOW you have achieved your objectives, click **START** below and add the required information. **SAVE** your changes, return to this page and, when you are happy with your comments click **SUBMIT** - please note this cannot be amended once you have submitted.

Reviewer Guidance

Ahead of an End of Year review conversation with your team member, it is helpful to have reviewed the information from regular one to ones and relevant meetings to have information on their performance to hand. As self-rating is now optional, you should advise your team member whether you would like them to submit a self-rating and advise how this will be used in the discussion. You should remind them that no ratings will be confirmed until after calibration.

Once you have made your own assessment of their performance and considered a rating for them against both WHAT they have achieved and HOW they have achieved it you should review your team members completed progress update and

Start **Print**

Ensure that you read through the guidance within the page.

Outline a summary to evidence your review reflections on WHAT you have achieved. This is a required field and **cannot** be left blank. It is recommended to type this up in word beforehand and copy over into the correct section of the form for ease of completion.

Outline a summary to evidence your review reflections on WHAT you have achieved. (required)

This is test data for reviewee WHAT I have achieved

Outline a summary to evidence your review reflections on HOW you have performed. This is a required field and **cannot** be left blank. It is recommended to type this up in word beforehand and copy over into the correct section of the form for ease of completion.

Outline a summary to evidence your review reflections on HOW you have performed. (required)

This is test data for HOW I have performed.

Please ensure that you read through the **‘Calibration Acknowledgement’** section. The form will not be able to be submitted to your line manager until the **‘Confirmed’** check box has been ticked.

Calibration Acknowledgement

I confirm that I am aware that any proposed ratings discussed with my manager during this process are subject to calibration which will take place in August, with a final confirmed rating and pay implications being confirmed in September.

Confirmed (required)

Please ensure that you read through the **‘Submitting your End of Year Review’** section. The form will not be able to be submitted to your line manager until the **‘Confirmed’** check box has been ticked.

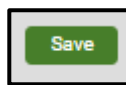
Submitting your End of Year Review

Once the above sections have been completed, remember to submit your form. This can be done by clicking **SAVE**, returning to the **SUMMARY** page, then clicking the **SUBMIT** button on the home page.

I confirm that I understand that once I have submitted this section of the form no further amendments will be able to be made.

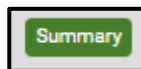
Confirmed (required)

To submit the form, click on 'Save'. You will be notified that you have saved your section of the form.

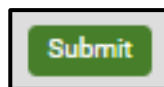


i Changes have been saved.

Click on 'Summary' to return to the summary page.



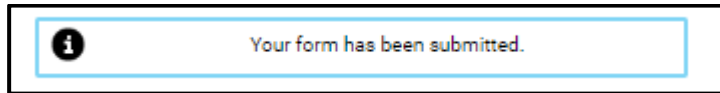
Once you are back on the form summary page click on 'Submit' and 'Ok'. Please note that once you have submitted the form you will not be able to make any changes to your comments, therefore it is important ensure that you are happy with these before submission and that they have been saved correctly within the form.



hrconnecttest.napier.ac.uk says

You are about to submit this form, select OK to continue or cancel to return to the form

You will be notified that your section of the form has been submitted.

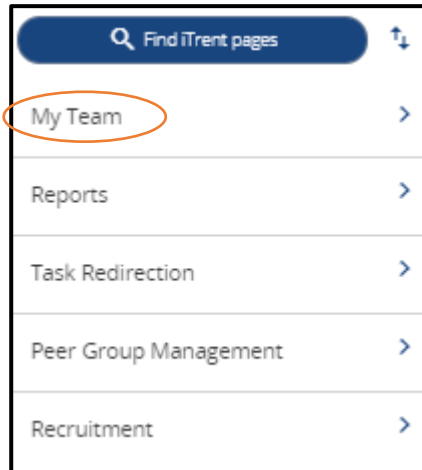


Once you have submitted your manager will receive an email informing them of this.

Manager (Reviewer): Completing the EOY Ratings & Comments for your Team Member

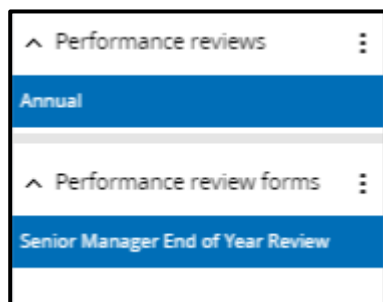
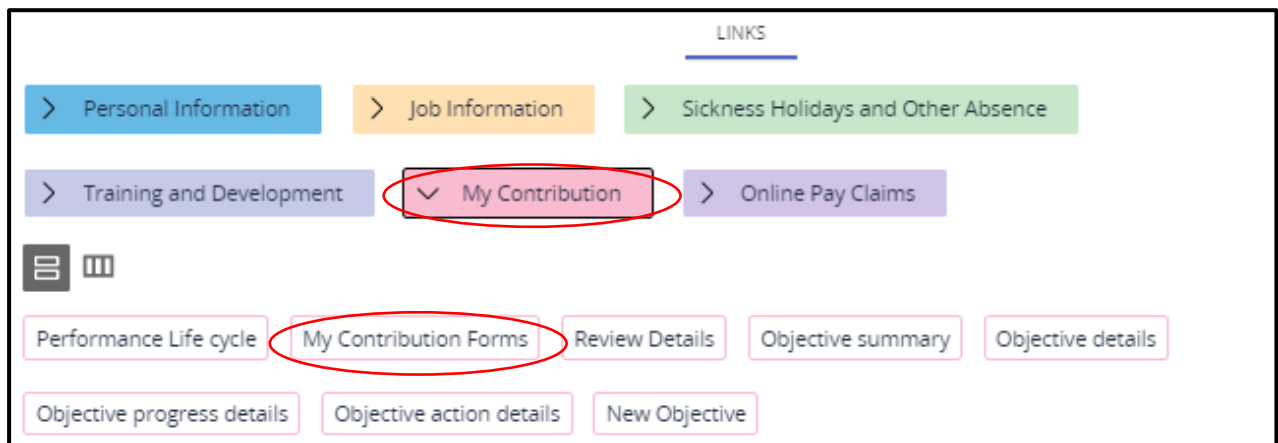
Once your team member has submitted their section of the form, you will receive an email notifying you of this. Please note that you will not be able to access the form until they have submitted their section.

Log into People Manager, click on **'My Team'**.

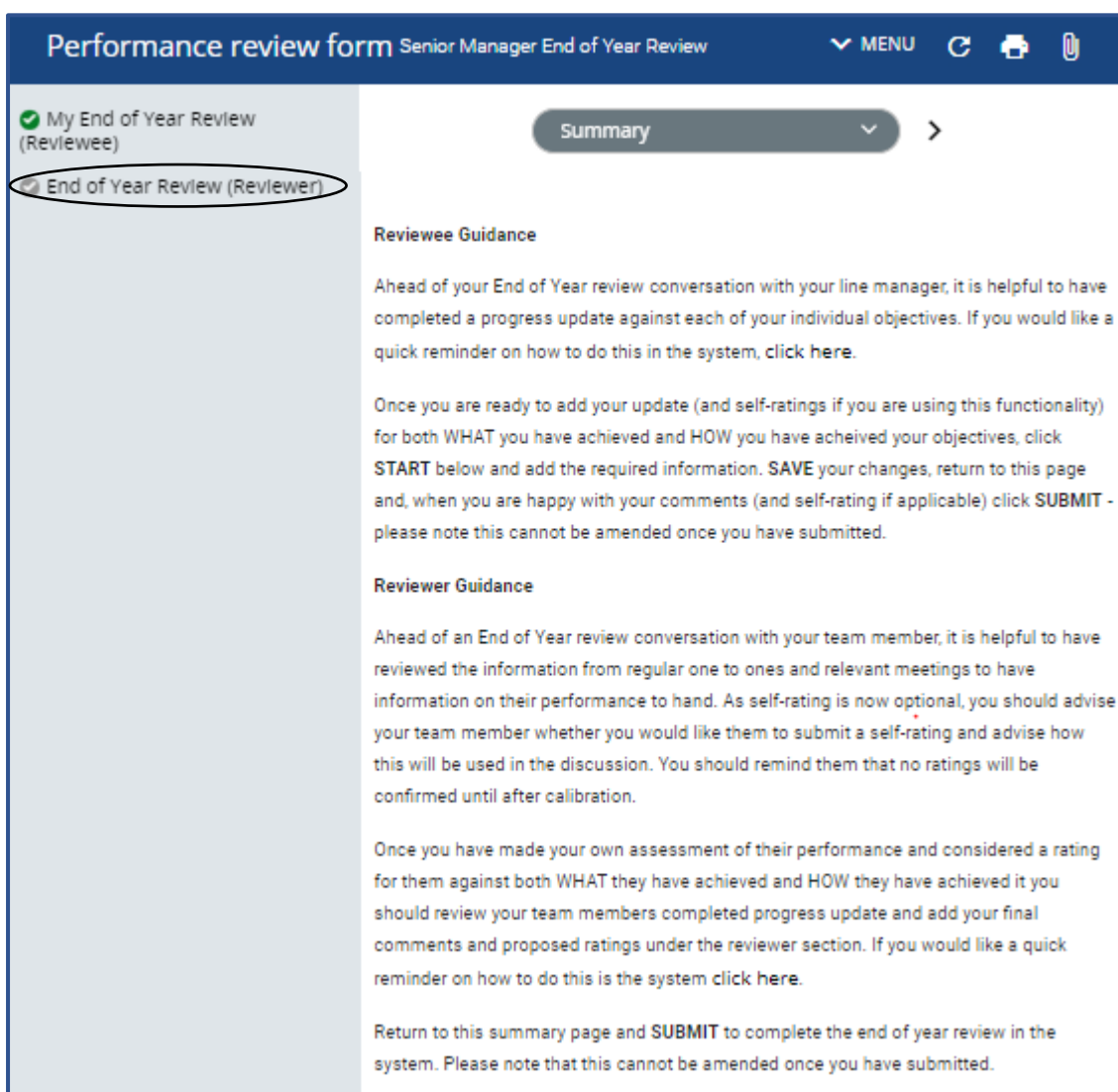


Select the team member from the left-hand side of the screen.

Click on **'My Contribution'** and **'My Contribution Forms'** and select the correct review and form for the current review period from the left-hand side of the screen.



Read through the ‘Reviewer Guidance’ section and click on ‘End of Year Review (Reviewer)’.



Please ensure that you read through the guidance on this page.

Having reviewed the information provided by both you and your team member and having discussed their performance over the last year, you are required to propose an overall WHAT and an overall HOW rating as well as a detailed explanation to support your ratings. You can review the [Guidance on Rating Descriptors](#) and the [Senior Manager My Contribution Guidance](#) for more information.

So that you can easily see what your team member has input, you can see this on the left-hand side of the page (greyed out).

Outline a short overall summary to evidence why you have chosen this rating. This will be considered by the calibration committee, so please take care to provide a clear summary. You may want to reference achievements in relation to their role and to consider the impact this has had against local area targets and aims.

Outline a summary to evidence your review reflections on WHAT you have achieved.

test

Read through the guidance within the page.

Input the WHAT rating. This is a required field and cannot be left blank.

Reviewer WHAT rating

Reviewer WHAT rating

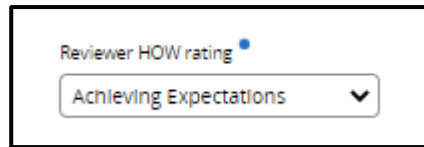
Exceptional

Outline a summary to evidence why you have chosen the WHAT rating. This is a required field and **cannot** be left blank. It is recommended to type this up in word beforehand and copy over into the correct section of the form for ease of completion.

Outline a short overall summary to evidence why you have chosen this rating.

Test WHAT rating evidence

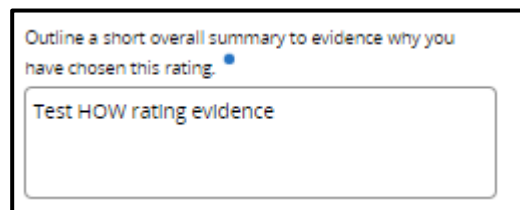
Input the HOW rating. This is a required field and cannot be left blank



Reviewer HOW rating ■

Achieving Expectations ▼

Outline a summary to evidence why you have chosen the HOW rating This is a required field and **cannot** be left blank. It is recommended to type this up in word beforehand and copy over into the correct section of the form for ease of completion.

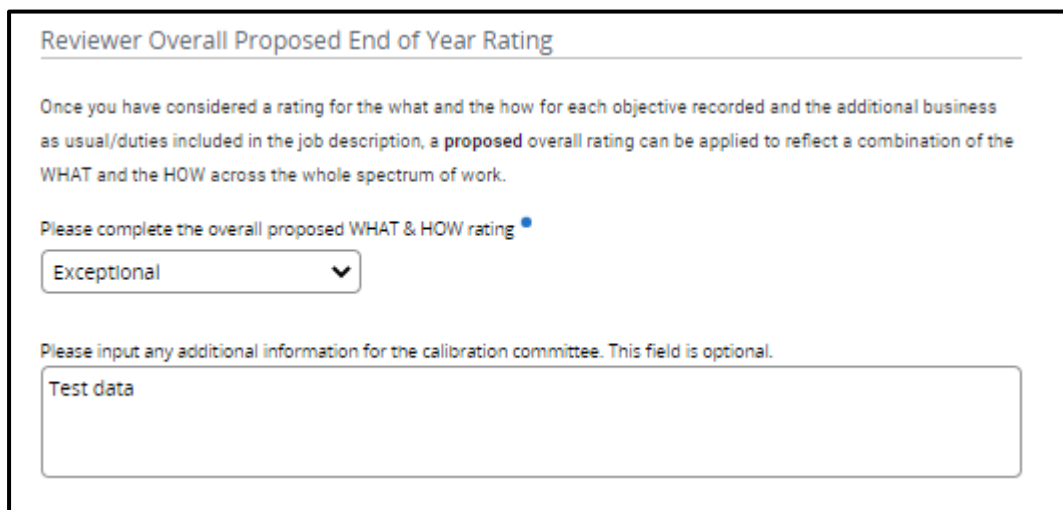


Outline a short overall summary to evidence why you have chosen this rating. ■

Test HOW rating evidence

Input the overall proposed end of year rating. This is a required field and cannot be left blank.

You can also input any additional information which you would like the calibration committee to be aware of (this is an optional field).



Reviewer Overall Proposed End of Year Rating

Once you have considered a rating for the what and the how for each objective recorded and the additional business as usual/duties included in the job description, a **proposed** overall rating can be applied to reflect a combination of the WHAT and the HOW across the whole spectrum of work.

Please complete the overall proposed WHAT & HOW rating ■

Exceptional ▼

Please input any additional information for the calibration committee. This field is optional.

Test data

Please ensure that you read through the **‘Calibration Acknowledgement’** section. The form will not be able to be submitted until the **‘Confirmed’** check box has been ticked.

Calibration Acknowledgement

I confirm that my team member is aware that any proposed ratings discussed with them during this process are subject to calibration which will take place in August, with a final confirmed rating and pay implications being confirmed in September.

I confirm that I will inform and discuss with them the final rating when this has been confirmed by the calibration committee.

Confirmed

Please ensure that you read through the '**Submitting the End of Year Review**' section. The form will not be able to be submitted until the '**Confirmed**' check box has been ticked.

Submitting the End of Year Review


Once the above sections have been completed, remember to submit your form. This can be done by clicking **SAVE**, returning to the **SUMMARY** page, then clicking the **SUBMIT** button on the home page.

I confirm that I understand that once I have submitted this section of the form no further amendments will be able to be made.

Confirmed

To save and submit the form, click on '**Save**'. You will be notified that you have saved your section of the form.

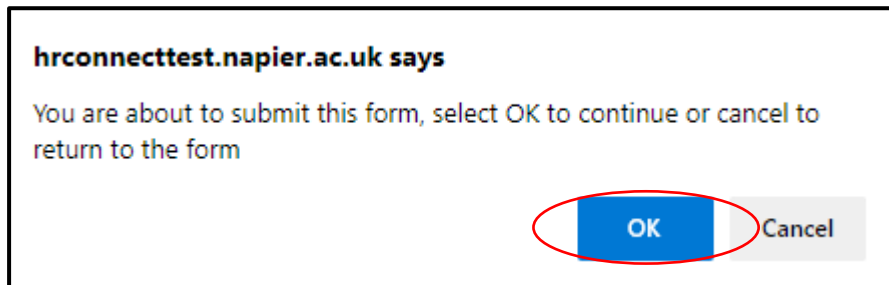


 Changes have been saved.

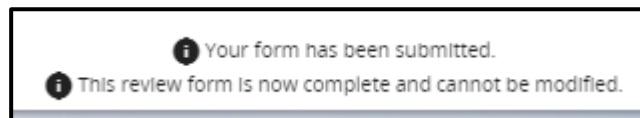
Click on '**Summary**' to return to the summary page.



Once you are back on the form summary page, click on **'Submit'** and **'Ok'**. Please note that once you have submitted the form you **will not** be able to make any changes to your ratings and comments, therefore it is important to ensure that you are happy with them before submission and that they have been saved correctly within the form.



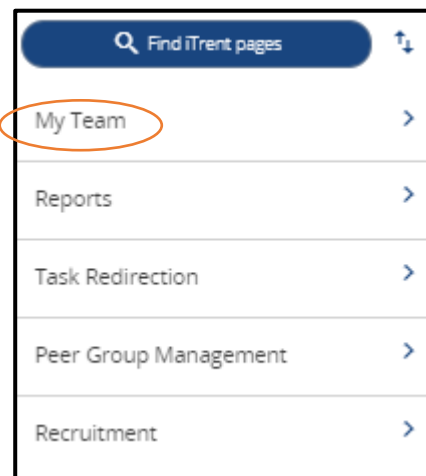
You will be notified that your section of the form has been submitted and that it is now complete and cannot be modified. Your team member will receive an email informing them that it has been completed.



Manager (Reviewer): Completing the Calibrated Review Form for your Team Member

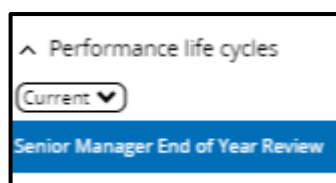
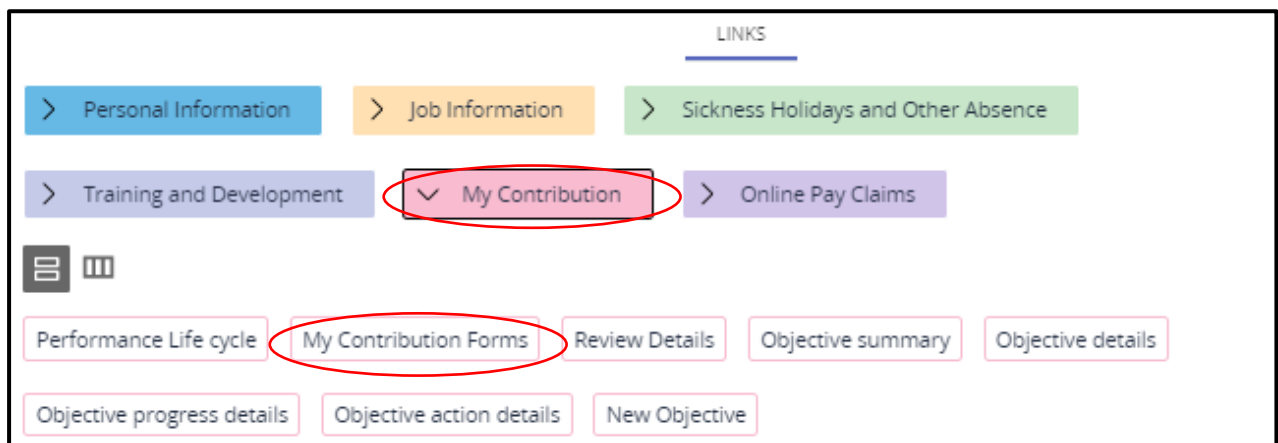
In August you will be notified of your team members final calibrated rating. Once you receive this, please ensure that you inform and discuss this with them **before** recording the final calibrated rating in HR Connect. When you are ready to record the final rating, please follow the instructions below.

Log into People Manager, click on **'My Team'**.



Select the team member from the left-hand side of the screen.

Click on **'My Contribution'**, **'Performance Lifecycle'** and select the **'Senior Manager End of Year Review 23/24'** lifecycle from the left-hand-side of the screen.



Click on **'Generate'**.

The screenshot shows a web interface for the 'Senior Manager Calibrated Review Form'. The title bar reads 'Life cycle Senior Manager End of Year Review'. The main heading is 'Senior Manager Calibrated Review Form' with a target end date of '31 May 2023'. A sidebar on the left shows a progress indicator with three steps: 'Senior Manager End of Year Review' (completed), 'Senior Manager Calibrated Review Form' (current step, highlighted in yellow), and 'Senior Manager Calibrated Review Form' (next step). The main content area has an 'Action responsibility:' label and a blue 'Generate' button, which is circled in red.

Read through the **'Reviewer Guidance'**. section and click on **'Start'**.

The screenshot shows the 'Reviewer Guidance' section of the 'Performance review form'. The title bar reads 'Performance review form Final Calibrated End of Year Review'. A 'Summary' dropdown menu is visible. The 'Reviewer Guidance' text states: 'Once the calibration committee have informed you of the final calibrated rating for your team member, this needs to be recorded within this form. Once recorded please remember to **SAVE**, return to this summary page and then click on **SUBMIT**. Please note that once you have submitted the form you will not be able to make any amendments to it. Your team member will be notified once you have submitted the form and will be able to see the final calibrated rating.' At the bottom, there are 'Start' and 'Print' buttons, with the 'Start' button circled in red.

Input the Final Calibrated Rating as confirmed by the calibration committee.

The screenshot shows a form field for 'Final Calibrated End of Year Review Rating'. Below the title, there is a text prompt: 'Please record the final End of Year Rating for your team member as confirmed by the calibration committee'. Below the prompt is a dropdown menu with a downward arrow.

Please ensure that you read through the '**Final Calibration Acknowledgement**' section. The form will not be able to be submitted until the '**Confirmed**' check box has been ticked.

Final Calibration Acknowledgement

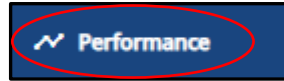
I confirm that I have informed and discussed this final calibrated rating with my team member.

Confirmed

When this page has been completed, click 'Save' at the bottom of the screen. Return to the Summary screen and click 'Submit' This will send an email to your team member to advise them that the Calibrated Rating has been entered, and asking them to log in to HR Connect to acknowledge this rating.

Employee (Reviewee): Acknowledging the Calibrated Review Form

Once you receive the email advising you that the calibrated rating has been entered, log into HR Connect Employee Self Service and click on **'Performance'**.



Within the **'Review lifecycles'** section, click on **'Senior Manager End of Year Review 23/24'**

You will see that the end of year review form is now at the Final Calibration Acknowledgement stage. Click to access the relevant area of the form, tick the box to confirm that you have acknowledged the rating entered by your manager, and enter any comments as appropriate.

Final Calibration Acknowledgement

I confirm that I have been informed of this final calibrated rating by my manager and I am happy with the outcome.

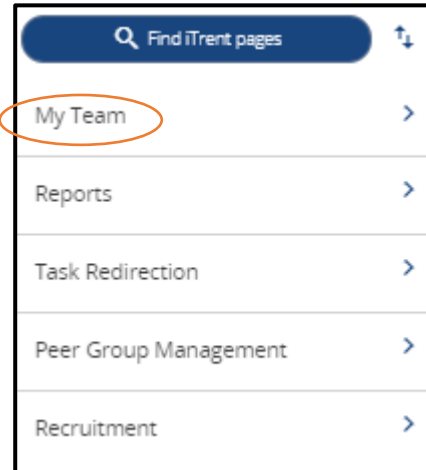
Confirmed (required)

Please add any comments here

Once complete, click 'Save' at the bottom of the screen. The return to the Summary Screen and click 'Submit'. This will send an email to your manager to advise them that the Calibrated Rating has been acknowledged, and asking them to log in to HR Connect to submit the form.

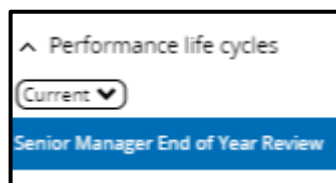
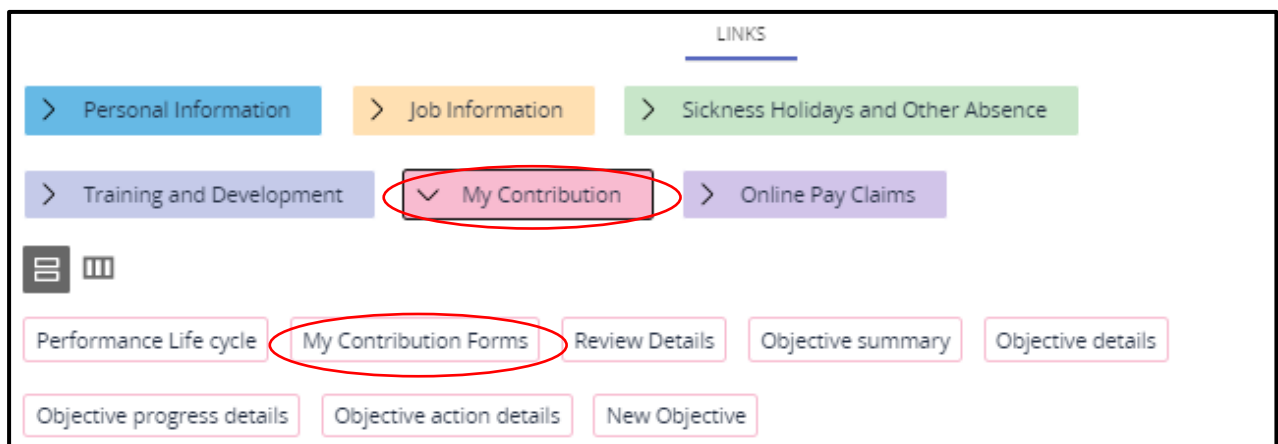
Manager (Reviewer): Submitting the Calibrated Review Form for your Team Member

Once you receive the email advising you that the calibrated rating has been acknowledged, log into People Manager, and click on **'My Team'**.



Select the team member from the left-hand side of the screen.

Click on **'My Contribution'**, **'Performance Lifecycle'** and select the **'Senior Manager End of Year Review 23/24'** lifecycle from the left-hand-side of the screen.



Navigate to the **'Final Submission'** section and ensure that you read through the instructions on this page. The form will not be able to be submitted until the **'Confirmed'** check box has been ticked.

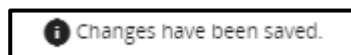
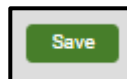
Final Submission

Once the above sections have been completed, remember to submit your form. This can be done by clicking **SAVE**, returning to the **SUMMARY** page, then clicking the **SUBMIT** button on the home page. Once the form has been submitted it cannot be modified so please ensure that all information is correct before submission.

I confirm that I understand that once I have submitted this section of the form no further amendments will be able to be made.

Confirmed

To save and submit the form, click on **'Save'**. You will be notified that you have saved this section of the form.



Click on **'Summary'** to return to the summary page.



Once you are back on the form summary page, click on **'Submit'** and **'OK'**. Please note that once you have submitted the form you **will not** be able to make any changes to the final rating, therefore it is important to ensure that this has been recorded correctly before submission.



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You are about to submit this form, select OK to continue or cancel to return to the form

Once submitted, your team member will receive an email informing them of this. They will be able to view their final rating on HR Connect.