MBI ePerformance Manager Guide 2024

Team Leaders,

We have reached that time in the year to complete employees' annual performance reviews. I hope that you have been having discussions with your employees about performance throughout the past year so there are no surprises. This year, performance reviews will run from May to mid-June.

Per our process, we will continue to include the following groups in the performance cycle:

- Full-time employees, including managers (excluding VPs)
- Part-time employees (excluding students and adjuncts)

Every employee in the two groups listed above must receive a performance review. Remember, this is an important conversation with your employee(s). Please arrange for a dedicated time to hold a meaningful discussion, have an open dialogue about past performance, and set expectations for the future.

The performance review cycle is **7/1/2023 – 6/30/2024**. Below is a detailed breakdown of the timeline:

- **May 6** – Opening Day: All employes will receive a notification that they may begin their self-assessment via email and through UKG.
- **May 8 & May 14** – Virtual Course: UKG Performance & Conducting Effective Performance Reviews
- **May 17** – Last day for employees to complete their self-assessment,
- **May 13 – June 7** - Manager completes reviews online and meets with employees to discuss their performance review. After the meeting, the primary reviewing manager submits the final review to their manager for approval.
- **June 14** – Deadline for employees and manager to acknowledge the review.
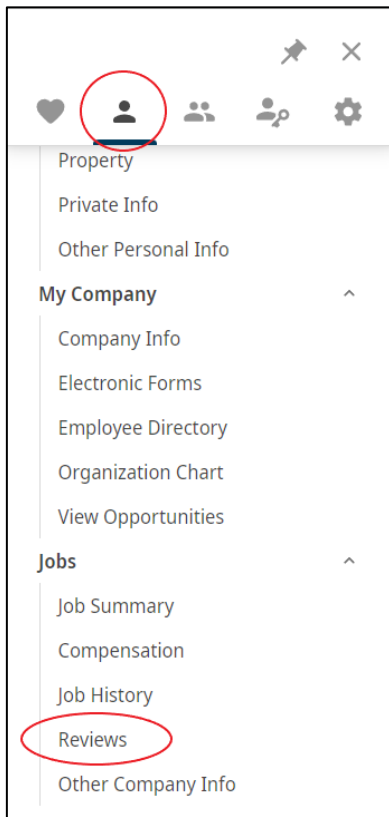
This guide breaks down each step of the performance review process:

A) **Employee Self-Assessment (Page 2)**
B) **Completing the Manager Review (Page 3)**
C) **Approving Manager Review (Page 7)**
D) **Employee Acknowledgement (Page 7)**
E) **Manager Acknowledgement (Page 8)**
F) **Frequently Asked Questions (Page 8)**

If you have any questions or need guidance through this process, please reach out to Darric Obinger at darric.obinger@moody.edu.

A) Employee Self-Assessment

1) The HR Performance Administrator will launch the performance reviews directly to your employees. Most will receive an employee template. Those who have two or more professional, direct reports will receive the manager template.

2) Your employee will receive a notification via email and through the UKG system (**UKG>Menu>Myself>Jobs>Reviews**). To access their review, they <u>must</u> have the UKG system open on their desktop or laptop. The UKG phone application does not support performance reviews.

3) Your employee will fill out their self-assessment and "send" the review forward to you for review. Your employee's self-assessment is due by **May 17, 2024**.
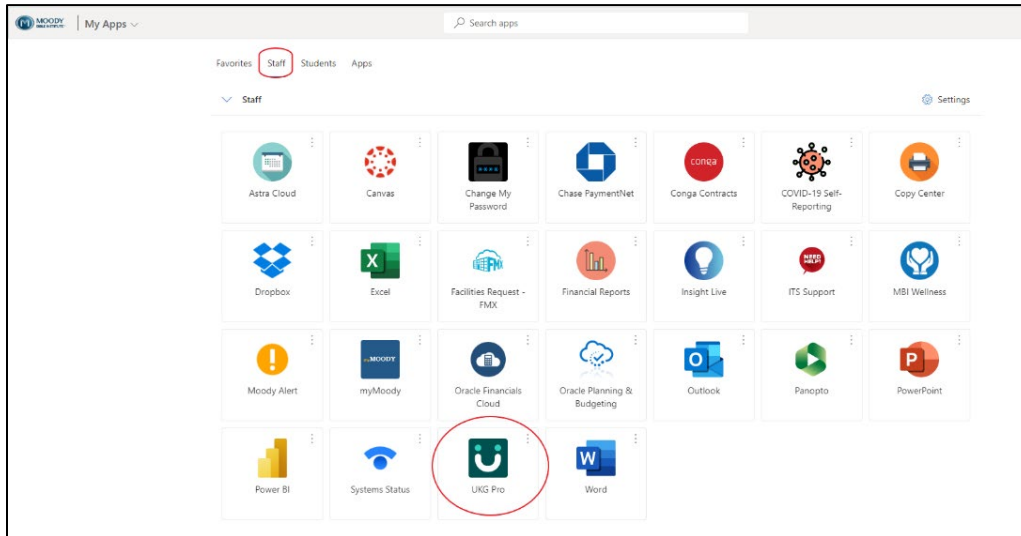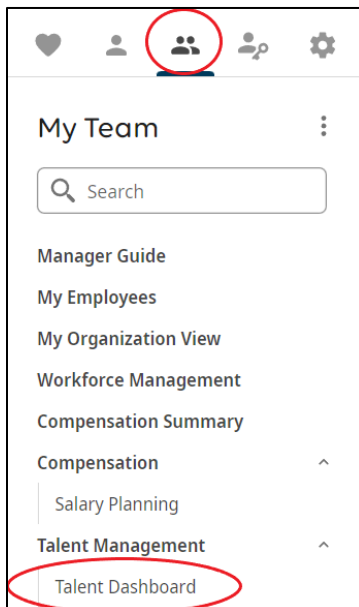
B) Completing the Manager Review

1) Once your employee(s) has completed their self-assessment and sent the review forward, you will receive a notification via email and through the UKG system.
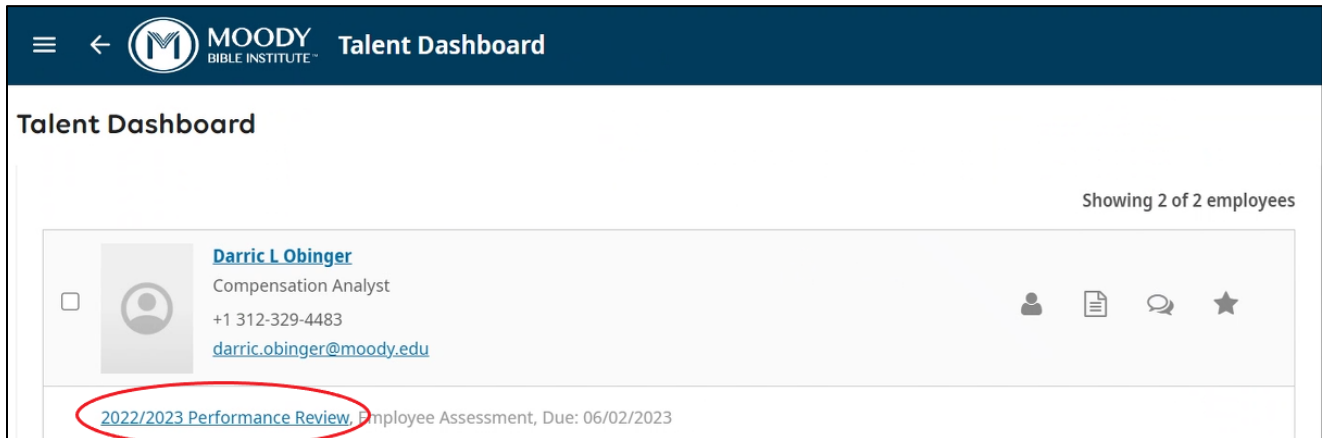
https://myapplications.microsoft.com/

Navigation: UKG>Menu>My Team>Talent Dashboard

Your Talent Dashboard will show you all of your direct reports and where they are in the performance review process. You will also be able to see last year's review.

The Review Summary page provides access to all the components and details of an employee's performance review. Sections are added to a review when the template is created by the HR Performance Administrator. These sections appear on the Review Summary page once the performance review is distributed.

2) Once you select a review from the Talent Dashboard, the Review Summary page appears. **Open each section of the review, by selecting any of the Start buttons.**

This year, the Employee UKG Review Template will include the following sections:

- Competencies (Performance Factors) **(Only on employee template)**
- Open Ended Questions
    - What were the employee's accomplishments during the last fiscal year?
    - What are the employee's goals for the upcoming fiscal year?
    - Did the employee's working arrangement (i.e. onsite, telecommuting, or remote work) during the last fiscal year allow the employee to effectively meet the requirements of the job? If not, what are suggested adjustments or changes to optimize productivity and ensure a successful work setup?
    - Does the employee demonstrate understanding and support of the mission of Moody Bible Institute? (Yes or No)
    - Does the employee demonstrate understanding and support of the values of Moody Bible Institute? (Yes or No)
- Overall Comments
- Final Score (For the employee template, final score is automatically calculated by Competency scores. For the manager template, the final score is manually determined by the reviewer.)

Note: The employee will only be required to fill out the Open Ended Questions before they can send the review to their manager. <u>Managers are required to fill out each section before they can send the review to their manager (Approving Manager – typically a VP or Director) for approval.</u>

When completing the Competencies (Performance Factors), MBI uses the following scale for the employee template:

1) **Unsatisfactory:** Regularly fails to meet job performance expectations
2) **Needs Improvement:** Meets some, but not all, necessary job performance expectations.
3) **Meets Expectations:** Meets all necessary job performance expectations.
4) **Exceeds Expectations:** Meets all and exceeds many job performance expectations
5) **Outstanding:** Substantially exceeds all job performance expectations

Note: *Meets Expectations* is considered by Moody Bible Institute as the <u>standard</u> level of performance. For each rating other than "Meets Expectations" please provide a comment to justify the rating and give examples wherever possible.

Note: When completing the Competencies, be sure to save your work periodically. Although the system provides warnings about when it will time-out, it is best practice to save your work every time you leave your desk.
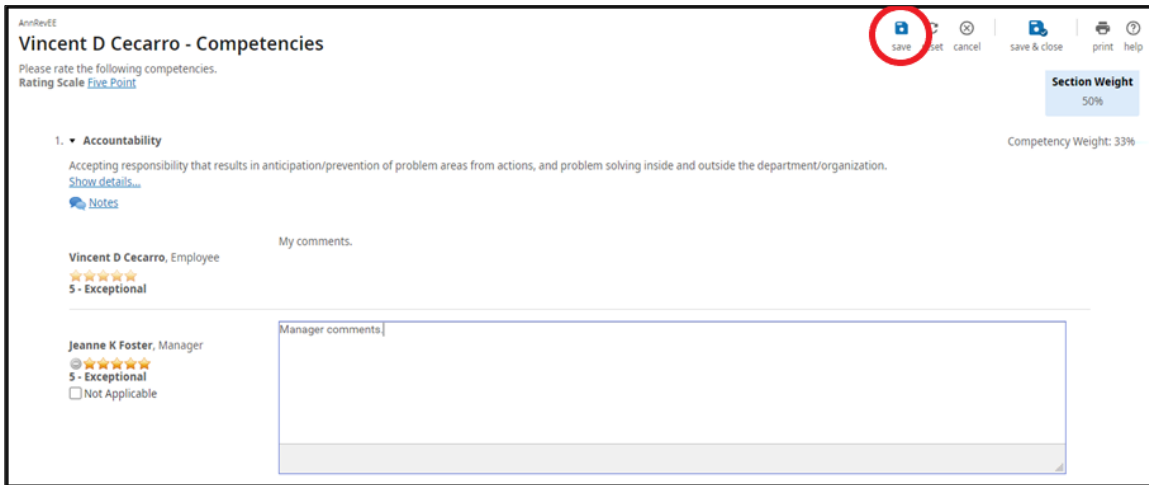
Note: When determining the final score for the Manager template, MBI uses the following scale:

1) **Below Expectations:** Meets some, but not all, necessary job performance expectations.
2) **Meets Expectations:** Meets all necessary job performance expectations.
3) **Exceeds Expectations:** Meets all and exceeds many job performance expectations.

Note: If you need further assistance while you are completing the review, try looking through the learning resource **Performance Review Resources for Managers** on the right side of your screen.
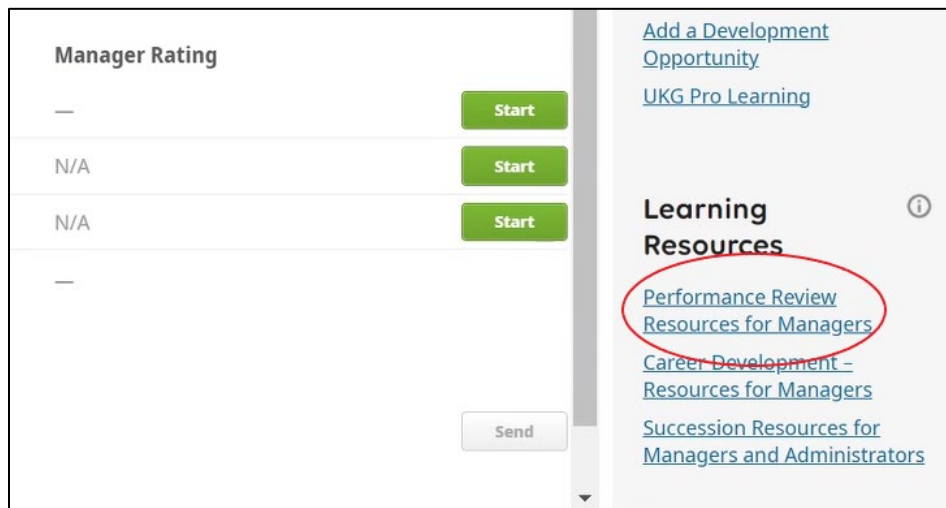
C) Approving Manager Review

1) When the manager review is complete, "send" the document to your manager (Approving Manager – typically a VP or Director) for approval.

2) Your manager will receive a notification via email and through the UKG system.

Note: Your manager will have the option of adding comments about the employee. After this, they can either send the review back to you for editing or to approve it for employee acknowledgement.

3) If your manager approves the document, you will receive a notification via email and the UKG system asking you to forward it to your employee for final acknowledgement.

D) Employee Acknowledgement

1) Once the document is approved by the Approving Manager and sent forward to the employee, the employee will be able to see everything added by the initial reviewer. The Approving Manager's comments will not be seen by the employee.

2) All employees must acknowledge that they have discussed the review with their manager. Here is the acknowledgement statement:

By Signing & Completing the performance review, you are acknowledging that you discussed this review with your manager. If you disagree with your manager's comments or evaluation, you may submit a comment when acknowledging the review.

E) Manager Acknowledgement

    1) Once the document is acknowledged by the employee, you will be asked to give your final acknowledgement.

    2) All managers must acknowledge that they have discussed the review with their employee. Here is the acknowledgement statement:

I have reviewed this document with my employee.

Frequently Asked Questions

Q) How do I access my employees' previous reviews from the former HR system, HCM?

A) Log in to your MyMoody account and select Manager Self-Service from the left-hand menu. From there, you will be able to view Historical Reviews in HCM.

Note: If you were not the manager of your current employee when the review was filled out, please reach out to Darric Obinger (darric.obinger@moody.edu) to transfer those documents to you. If you have been hired since UKG became our new HR system in 2022, Darric can send you those documents to you in PDF form.

Q) In years past, I was able to choose the template I wanted to use for my employee. Can I do that again this year?

A) The way HCM was set up allowed the manager to choose the template they used to evaluate the employee. In UKG, the HR Performance Administrator launches the performance reviews directly to your employee, which will allow the process to start quicker and without the hurdle of the manager having to create the document.

We are open to exploring the option of adding more templates in the future. This year, the document that was sent to your employee should be the document both they and you complete. If you feel your employee was given the wrong document, please email Darric Obinger (darric.obinger@moody.edu) and explain your rationale. Most employees should receive the *employee* template.

Q) Whoops! I forgot to add something to the review. What can I do?

A) If you send the review document forward to your manager (Approving Manager) but made some mistakes or forgot something, the Approving Manager can send the review document back to you. This option is clearly displayed at the bottom of their document.

If you are not able to contact the Approving Manager or they are having difficulty returning the document, the HR Performance Administrator (darric.obinger@moody.edu) can go in and adjust the document status.

Q) Does UKG allow me to run any reports for performance?

A) Yes! You can track the status and scores of your employees. Navigate to **UKG>Menu>My Team>Talent Dashboard.** On the right-hand side, you will see a list of reports available to you.