

2025 NSM Leader

Performance Development Guide

**NATIONAL
SEATING &
MOBILITY**



2025 NSM Leader Performance Development Guide

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Mission, Vision & Values

OUR MISSION.

We deliver personalized **solutions** to individuals with **mobility** challenges by bringing together industry-leading expertise, uniquely engineered systems and **breakthrough technologies**. Our products and services provide independence and **self-reliance** to clients; reassurance to family and caregivers; and responsive, flexible and highly professional **clinical support** to our referral sources.

OUR VISION.

Our calling goes beyond being a preferred provider of mobility solutions. It is how we **touch lives** with a genuine **compassion** that begins deep within our hearts and is carried throughout everything we do. It is what will continue to drive us to build **lifelong relationships** with our clients, **honoring their journey** of independence with ingenuity and excellence that **helps them move through life**.

We will never be satisfied until we have **exceeded the expectations** of those we serve in our quest to be a **trusted partner**. Breaking more barriers, impacting more lives. Taking us where we aspire to be, and our clients, **where they deserve to go**.

CORE VALUES.

Honor

Doing the right thing, even when no one is looking.

Excellence

Always striving to do better.

Accountability

Being motivated and responsible for our actions and results.

Respect

Treating others as you want to be treated.

Teamwork

Working together to achieve more.

Service

Taking action to create value for others.

Leading with Mission

Our Mission Statement only comes to life for individuals when we connect the Mission to personal values. Motivation begins with engagement and a passion for what we do. We can inspire others and create an environment that engages staff to excel when we align our behaviors and actions to our Mission, Vision and Values. Mission, Vision and Values is the basis for all of our organizational decisions.

It is important that we, as leaders, are overt and intentional about communicating the connection to the Mission on a daily basis. During Performance Discussions and every time we communicate, we have an opportunity to reinforce the Mission, Vision and Values. If we leverage this, we can bring the work that we do to our staff in a way that they can hear the message with both their minds and their hearts.

It is imperative that we all leverage our Mission, Vision and Values to create the culture in which we can effectively and efficiently meet our business objectives.

“Outstanding people have one thing in common: An absolute sense of Mission” – Zig Ziglar

Performance Development at NSM

Creating a culture of Performance Development is a high priority at NSM to attract, develop, and retain top talent. The Performance Development Discussion process is a key component of the Employee Lifecycle.



At NSM, we know **PEOPLE** are the key to our business success.

Performance Development is at the HEART of making NSM a great place to work by engaging employees and their manager/supervisors in a meaningful two-way conversation about goals, progress, performance and future growth.

Employees who participate in meaningful performance discussions are more

satisfied in their jobs and contribute at a higher level. High-performing employees drive excellent client satisfaction and business results.

The Performance Development Process is a conversation between the employee and their manager/supervisor regarding performance and contributions to NSM's success. It's an opportunity to receive positive feedback as well as developmental coaching on areas for improvement. This designated time for the performance discussion provides the employee an opportunity to give feedback to their manager/supervisor, clarify expectations and discuss career aspirations.

The Performance Discussion should be a summary of the feedback and coaching that has taken place throughout the year. ***The content of the discussion should never be a surprise to an employee.***

2025 Performance Development Process Includes:

- Utilization of the UKG® system to facilitate the Performance Development Discussion
- An Employee Self-Reflection
- Scoring of HEARTS Core Values
- Scoring of Overall Performance in the role
- An opportunity to list strong performance areas and areas to seek improvement
- An opportunity to discuss career aspirations and desired developmental opportunities
- An opportunity to provide feedback to manager/supervisor on areas where you can be better supported
- One over one review process

Performance and the Impact on Merit Increases:

NSM links annual merit increases to individual contributions. The Performance Development process will highlight contributions and performance, which affects the merit increase decision. To be considered for a pay increase, employees must receive a rating of High Performer or Solid Performer on HEARTS Core Values and Overall Performance.

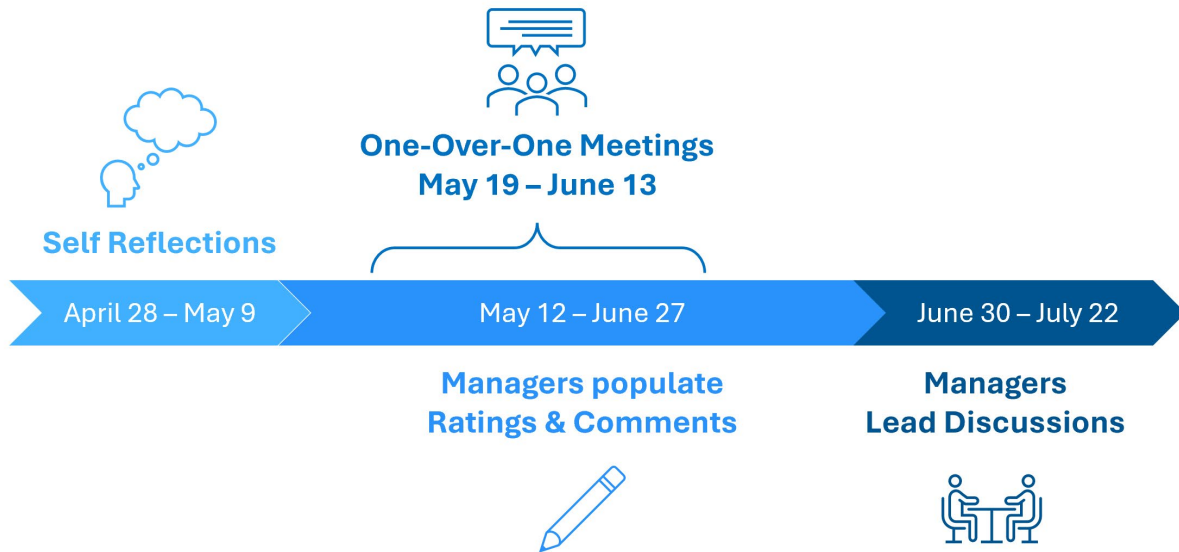
UKG®

 UKG is NSM's integrated talent management tool. This system allows employees to document performance goals, discuss competencies, track development activity and manage/update career aspirations.

UKG® makes performance management a continuous, collaborative experience.

- ✓ ***Utilize the step-by-step job aid on page 17 to utilize UKG® in the Performance Discussion process.***

2025 Performance Development Timeline



New Employees

Employees hired before January 1, 2025, will be included in the 2025 Performance Development and annual merit increase process.

New hires with a start date after January 1, 2025, should have a 60-day new hire discussion document in UKG instead of the annual review form. New hires will not be eligible for the annual merit increase.

New Manager/Supervisors

In some cases, employees will have multiple managers/supervisors during the course of the year. The employee's manager/supervisor, at the time that the discussion is assigned, is responsible for ensuring that the documents are completed. The manager/supervisor should seek and carefully consider the input of the prior manager/supervisor. The prior manager/supervisor is still responsible for providing feedback and input to the employee's development discussion.

NSM Core Competencies

At NSM our competencies are reflective of our Core Values, HEARTS. Core Values support the vision, shape the culture and reflect what NSM values as an organization. In 2025, employees will receive one rating for how they exhibit values. Employees and Leaders should include specific comments around the values and behaviors they excel in, as well as those that need development.

Value	Behaviors
Honor <i>Doing the right thing, even when no one is looking</i>	<ul style="list-style-type: none"> Fully understands and is compliant with NSM's policies and procedures. Demonstrates strong character. Builds trust and acts with authenticity to create a culture of integrity by being truthful and transparent. Adheres to high standards of personal and business ethics and behaviors.
Excellence <i>Always striving to do better</i>	<ul style="list-style-type: none"> Can be counted on to provide timely, high quality work. Often generates ideas for improvement. Welcomes new challenges and commits to contributing additional effort to achieve results. Has a "can do" attitude. Consistently demonstrates a positive and professional image of NSM. Takes initiative to seek professional development opportunities to acquire new skills and experiences that ensures industry-leading expertise.
Accountability <i>Being motivated and responsible for our actions and results</i>	<ul style="list-style-type: none"> Takes ownership of personal actions and decisions. Eagerly accepts responsibility for the role and is highly productive and reliable. Has the ability to successfully prioritize competing demands. Proactively asks questions to ensure a strong understanding of the job expectations. Seeks to solve problems and works to prevent future reoccurrences. Never walks past problems.
Respect <i>Treating others as you want to be treated</i>	<ul style="list-style-type: none"> Appreciates and acknowledges other's contributions. Is encouraging and builds self-esteem in others. Values differences and diversity within the workplace. Always treats others with kindness and dignity. Helps people be their best. Fosters professional and positive communication with others.
Teamwork <i>Working together to achieve more</i>	<ul style="list-style-type: none"> Promotes a productive and cooperative work environment. Builds trustworthy, collaborative relationships with team members. Listens objectively and respects other's ideas and opinions. Has the ability to compromise and successfully negotiate good outcomes when there is conflict among the team. Holds self and others accountable to accomplish individual and team goals.
Service <i>Taking action to create value for others</i>	<ul style="list-style-type: none"> Is attentive to customers, gaining their trust and respect. Committed to delivering exceptional care to customers (both internal and external). Identifies opportunities to exceed customer expectations. Demonstrates compassion and empathy for internal and external customers.

Performance Development Measures

Development measures will be used for the HEARTS Core Values, overall performance rating and the final score.

Performance Development Rating Scale	
High Performer	Performance in role clearly exceeds expectations. One of the best I know.
Solid Performer	Performance in role met the high expectations of NSM. Keep up the good work!
Needs Improvement	Performance in role is below expectations. Development Needed

The discussion includes a final overall feedback measure. Leaders will select the final measurement score as appropriate.

Guide for Anticipated Distribution of Scores

To provide each employee a fair performance measurement, utilize the distribution guidelines. These guidelines drive consistency in performance scores.

Rating	Needs Improvement	Solid Performer	High Performer
Percent of Employees	5% - 20%	70% - 80%	5% - 20%

- 'Solid Performer' is a strong rating. **Most employees will perform at this level.**
- These percentages will not necessarily apply to very small departments or branches. Every manager/supervisor is expected to contribute performance scores so that, as a whole, the organization will emulate this distribution.
- These are *guidelines*. Score performance accurately, based on actual observance of behaviors and skills. An accurate rating always takes precedence over achieving a planned distribution of ratings.

Guidelines for Fair and Accurate Scoring

Employees will be better able to improve performance and development if scoring is honest and objectively made. Here are some tips for both managers/supervisors and employees:

- **Understand the HEARTS/Core Competencies and the scoring scale.** Thoroughly review the core competency descriptors, so you can understand expectations required of an NSM employee. In addition, review the descriptors for the rating scale.
- **Think about specific behaviors** that reflect the employee's performance on the competency elements. These should be the basis for all of your ratings and will help in the performance discussion. It is easier for an employee to understand their scores when you can pinpoint behaviors that support the scoring.
- **Consider behaviors and results over a range of time.** Do not focus on behaviors that occurred only most recently. Look for typical patterns of behaviors and sustained levels of performance over a period of time, typically within the last year.
- **Avoid halo error.** Do not score an employee positively on all elements simply because they are particularly good in some areas. Alternatively, do not score an employee low on all areas unless that truly reflects the employee's performance. Think through your scoring on each item so that you provide an accurate description of strengths and opportunities for improvement.

Performance Discussion

The Performance Discussion process is divided into three parts - Competencies, Open-Ended Questions, and Overall Comments.

Part 1: Competencies

Part 1 of the Performance Discussion includes HEARTS Core Values and an Overall Performance measurement rating.

HEARTS Core Values Measurement:

Measure how well your employees have modeled NSM's HEARTS Core Values and how well they performed overall. Add specific comments related to your scoring of each employee.

Overall Performance Ratings:

Measure how well your employees have performed during the past year. Add specific comments related to your scoring for each employee.

Part 2: Open-Ended Questions:

Part 2 includes four open-ended questions.

Employee demonstrates strong performance in these areas

- Think what your employee does well on a consistent basis. Consider areas in which they display natural strength and areas in which they go above and beyond the normal scope of duty. How can they use these strengths to help teammates grow?

Areas to seek improvement

- Reflect on what your employee can improve upon. Consider the areas of their role that they struggle with or make mistakes in. Think about how you can coach the employee to improve in these areas.

Areas to gain additional experience, training or education

- Create a dialogue with your employee around their career aspirations and desired areas of growth. Seek to understand what they are truly passionate about. Discuss further growth interest and potential career paths.

As a manager, where can I offer you additional support

- Approach this section with a servant leadership mindset. Humbly seek to understand what you can do to better support your employee.

Tips for adding comments regarding key accomplishments or areas for improvement:

- Describe any major contributions and how the employee exceeded performance expectations.
- Accomplishments may include other achievements or recognition achieved during the performance year.
- List any new skills the employee may have learned or would like to learn.

- List any work the employee initiated or would like to initiate in the coming year. Make sure those items are relevant to both NSM and their own success.
- If you have difficulty identifying accomplishments or special strengths for an employee, think about what makes you proud of their work. (Examples: calming anxious clients, solving problems, mentoring new employees, coaching or counseling others)
- Throughout the year, keep a list of accomplishments and compile notes of recognition to share with your employee during the annual Performance Discussion conversation.
- Throughout the year, keep a list of areas in which you would like to see more development in the employee and share with them during the annual Performance Development conversation.

Part 3: Overall Comments

The Overall Comments section is used to include any final thoughts regarding your employee's performance.

Tips for adding Overall Comments:

- Consider adding ideas for better communication between you and your employee.
- Do you have access to all the tools and/or resources you need to do your job? If you don't, what are the roadblocks that are keeping you from getting those tools and/or resources?
- Do you have any concerns you would like to bring up about your department or the company?

Prepare and Participate in your own Performance Development Discussion

Why is the Performance Discussion Important?

- Provides an opportunity for recognition of key accomplishments.
- Establishes a clear understanding of job duties, responsibilities and priorities.
- Performance strengths and weaknesses are explored.
- Opportunity to receive coaching and feedback for becoming more proficient and productive.
- Opportunity to discuss career aspirations.
- Opportunity for employees and their manager/supervisors to align on future goals.

How to Prepare for your Development Discussion

- Complete the self-reflection honestly and accurately.
- What were your accomplishments? What goals did you meet? What areas are you most proud of?
- What goals did you not meet? Reflect on reasons for not meeting these goals.
- What areas of your position can you show improvement?
- What opportunities/concerns do you see in regard to your performance?
- Be as detailed as possible when giving examples of performance.
- Focus on your own behavior and not the behavior of others.
- It is a good idea to keep notes throughout the year to track your accomplishments and goals.

During the Performance Development Discussion

- Remember that the Performance Discussion is about open and productive communication between you and your manager/supervisor.
- Suggest ways that your manager/supervisor might remove barriers to your performance or ways to improve office productivity.
- Discuss career development.
- Treat the performance discussion as an opportunity to reflect on the last year. What areas of performance were you most proud, and what areas of performance could have been better?

After the Performance Discussion

- Your manager/supervisor should discuss positive performance and areas for improvement throughout the year. However, it is in your best interest to open up discussion about performance during the year, even if your manager/supervisor does not initiate it. Communication is a shared responsibility.
- Regard the Performance Development process as a learning opportunity. You should be able to take away valuable information about yourself, your manager/supervisor expectations, and goals and opportunities for the coming year.
- After reflecting on the meeting, contact your manager/supervisor to clarify any comments that may have been vague or need further explanation.

Writing Employee Performance Development Documents

Managers/Supervisors consult your HR Business Partner as needed throughout the process for guidance.

Prepare for the Performance Development Conversation

As you prepare documents for your employees, you need to compile a complete picture of that person's job performance. Review multiple sources of information, including:

- Notes you've taken throughout the year
- Employee's key accomplishments towards job specific key metrics, job history, including relevant skills and training
- Employee's self-reflection
- Think about the behaviors you want the employee to start, stop and continue
- DO NOT wait until the week of the discussion meeting to gather information!

Rate Performance/Write the Performance Comments

- Review the employee's Self Reflection, carefully reviewing their own performance ratings and provide your own rating (refer to page 7 for instructions on ratings)
- Include positive and developmental comments for the Open-Ended Questions and HEARTS Core Values.

Manager/Supervisor and Senior Leader Alignment

Prior to conducting the Performance Development Discussion:

Human Resources will schedule 1 over 1 meetings with you and your Senior Leader to discuss, align and confirm final Performance Documents (ratings and comments) that you have given each of your direct reports including:

- Discuss each employee document and rating
- You must meet with HR and your senior leader prior to scheduling the Performance Discussions with your team
- For employees who were rated “Needs Improvement,” additional discussion related to a Performance Improvement Plan should occur
- For employees who were rated “High Performance” or “Solid Performer,” discussion related to employee engagement and retention should take place
- Discuss your Merit increase recommendations and align on final percentages
- Prepare for Performance Development discussions

Conducting Employee Performance Discussions

Managers/Supervisors consult your HR Business Partner as needed throughout the process for guidance.

Prepare for the Performance Discussion

Before going into a performance meeting, think ahead about what you want to say and how you will say it. Use this worksheet to plan how to present your feedback in a productive manner.

1. **Get off to a good start.** To dispel anxiety, set a positive tone. What will you say to start the meeting? *For example, "I'm excited to discuss what you've accomplished this last year, and I want to address any challenges. This meeting will help us determine where I can support you and help you excel."*
2. **Lead with the positive.** Begin by focusing on the positive. What accomplishments and strengths can you mention? How did the employee help the team meet its goals?
3. **Prioritize your feedback.** Don't discourage an employee with a long list of problems. What are the most important issues you want to focus on? What is your core message for the employee?
4. **Be descriptive rather than "evaluative."** Where possible, describe your feedback in terms of numbers or key facts. Write down how you plan to make your feedback descriptive.
5. **Concentrate on the behavior, not the person.** Give feedback without making assumptions about people's underlying characteristics. *For example, instead of saying, "You aren't committed," say, "You haven't been attending our team meetings, and I'm concerned you are missing critical information."* Write down how you plan to tie your feedback to behavior.
6. **Orient feedback toward problem solving and action.** Ask your employee for ideas about how to improve their performance. *For example, say, "Do you have any ideas about how you can do things differently so you can get your tasks done on time? How can I help support you?"* What do you plan to say to engage your employee in closing a performance gap?
7. **Suggest specific strategies.** After you've heard your employee's ideas, offer your own suggestions. *For example, instead of simply saying, "Your work orders are missing key information," you may also add, "specific work order notes will help expedite the funding process."* What specific strategies might you propose?

Schedule the Performance Discussion

- Schedule meeting in advance – allow adequate time for your direct report to prepare for the discussion
- Give the meeting the attention it deserves – allow ample time for the discussion
- Choose a quiet location, turn off your phone and try to avoid interruptions
- Listen carefully to your employee and do not interrupt
- Ask questions. Part of active listening is asking more questions. Asking follow-up questions can help you understand more and dig deeper
- Provide coaching and feedback

Agree on Next Steps

- Provide the employee a copy of their documents
- Encourage the employee to continue development conversations with you
- Thank the employee for their hard work and commitment to NSM

Performance Discussion Discrepancies

- The employee knows best what they have accomplished. Managers/supervisors should listen carefully to the employee's comments shared in the Open-Ended Question section and HEARTS Core Values.
- Recognize that the manager/supervisor may (a) be less emotional about how to discuss those accomplishments, (b) be more attuned to improvements or declines in the employee's performance since last year, and (c) see achievements and contributions in a broader context than does the employee.
- Differences are best discussed and resolved in a face-to-face meeting. Ask open-ended questions to understand each other's point of view. Ask for elaboration or examples for better understanding.

Agenda for resolving differences:

- Manager/supervisor and employee states their view and provides facts to support the view.
- Identify why the views are different.
- Possible reasons include:
 - Lack of clarity on expectations or expected accomplishments
 - Insufficient communication (a mutual responsibility) throughout the year
 - Misunderstanding of Performance Development Ratings Scale
 - Manager/supervisor or employee did not properly consider input from others
 - Manager/supervisor and employee just don't see eye-to-eye
 - The employee may choose to bring others into the discussion, such as the manager/supervisor's manager or Human Resources

Managing Anger and/or Defensiveness:

- Never lose control of yourself
- Let the other person express themselves without interrupting
- Actively listen to what is being said
- Don't rush too quickly to reply with your point of view
- Explain to the other person how they are coming across
- If needed, adjourn the meeting until a time when the person can discuss issues more calmly

If no resolution is reached, the manager/supervisor's ratings are considered final.

Frequently Asked Questions

1. What is the time period to consider?

This discussion is oriented around a year “look-back” from the last performance discussion. Consider the employee’s past performance when rating HEARTS Core Values and commenting in the Open-Ended Question section.

2. Why are Self-Reflections a part of the Performance Management process?

Self-Reflections are an important part of the process. The self-reflection is very useful in two-way dialogue about performance, and the process gives the employee the opportunity to express support needed from the manager/supervisor going forward. In UKG, the employee self-reflection is required before the manager/supervisor can complete the Performance Documents.

3. What resources should I use to help me rate my employee?

Your Senior Leader will provide input during the one-over-one process. Also, consider talking to other managers/supervisors who work with that employee. You can also contact your HR Business Partner guidance on the process. It is recommended that you take notes throughout the year.

4. Do I have to write comments on every screen?

The comment sections are important to support performance ratings. You are strongly encouraged to include positive and developmental comments as appropriate. Comments can be used to indicate problem areas and provide guidance on how to improve work performance.

5. How will the merit increase budget work this year?

The merit increase pool will be distributed at a regional level. Senior Leaders within your region or function will work with local managers/supervisors for merit recommendations. There are several factors that affect merit increase decisions. If the employee has received an increase that was 3% or higher in 2025, or is a new hire, they will not be eligible for an increase. In addition, employees with an overall rating of “Needs Improvement” will not be eligible for an increase. **Do not communicate Merit Increases until regional leaders have received approval from executive leadership.**

6. Should I have a Performance Discussion with an employee hired in late 2024?

Yes, if the employee was hired prior to January 1, 2025, they should be included in the Performance Development process. For employees hired after January 1, 2025, you can wait until their 60-day anniversary to schedule the 60-day Performance Discussion.

UKG®: Complete Annual Self-Reflection Job Aid

UKG: Complete Annual Employee Performance Review Job Aid

2025 NSM Manager/Supervisor Performance Development Discussions

UKG Job Aid for Leaders

**NATIONAL
SEATING &
MOBILITY**

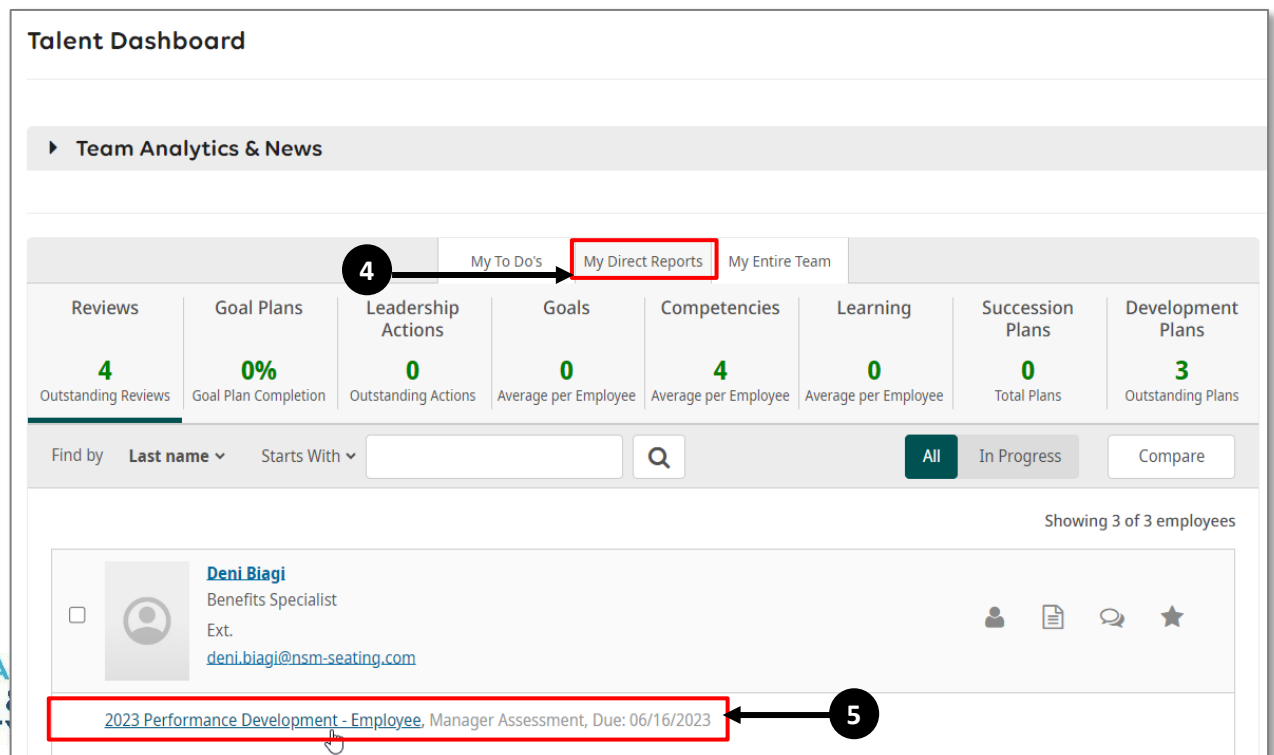
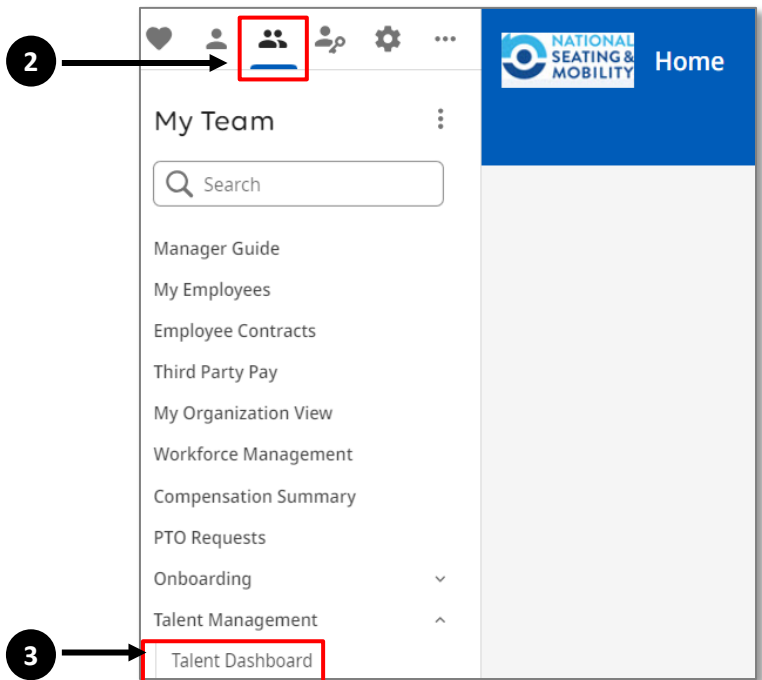


UKG: Complete Annual Employee Performance Discussion

This job aid is intended for NSM leaders to utilize when completing annual employee performance discussions documents in UKG.

1. Click the link to **UKG** via WNSM.
2. Select **My Team** from the main menu.
3. Select **Talent Dashboard** from the Talent Management section.
4. Click **My Direct Reports** and select the appropriate employee Performance Discussion.
5. Employees who have been here for several years will have multiple reviews listed. Click on the **2025** link to open this year's discussion document.

Note: You can minimize certain sections of this dashboard for easier navigation. You can search for an employee using the search bar or by scrolling through the alphabetic list.



UKG: Complete Annual Employee Performance Discussion

The annual Performance Discussion is broken into three parts:

1. Competencies
2. Open Ended Questions
3. Overall Comments

6. To complete the Competencies section, click the first green **Start**.

Review sections			
	Employee Rating	Manager Rating	
Competencies	—	—	6 → Start
Open Ended Questions	N/A	N/A	Start
Overall Comments	N/A	N/A	Start
Final Score	—	—	

Note: You can return to this section to make adjustments and additional comments by clicking **Edit**.

Review sections			
	Employee Rating	Manager Rating	
✔ Competencies Completed	2 - Solid Performer	—	Edit
Open Ended Questions	N/A	N/A	Edit
Overall Comments	N/A	N/A	Edit
Final Score	2 - Solid Performer	—	

UKG: Complete Annual Employee Performance Discussion

- 7. Review the Employee self-rating and comments related to the HEARTS Competency and Overall Performance.
- 8. From the drop-down menu, select the rating that best represents the employee’s Overall Performance over the last 12 months and how they modeled HEARTS Core Values. Refer to the Performance Development Rating Scale below.

Performance Development Rating Scale	
High Performer	Performance in role clearly exceeds expectations. One of the best I know.
Solid Performer	Performance in role met the high expectations of NSM. Keep up the good work!
Needs Improvement	Performance in role is below expectations. Development Needed

Note: For information on the Distribution of Ratings and the Guidelines for Fair and Accurate Reviews, utilize the 2025 Leader Performance Discussion Guide.

- 9. Enter comments related to the HEARTS Core Values and overall performance.

1. HEARTS Core Values

Competency Weight: 50%

Models NSM's core values, supports the mission/vision, and behaves in a way that reflects our HEARTS culture. Honor, Excellence, Accountability, Respect, Teamwork, Service. Specify areas the employee excelled and areas in which the employee needs improvement.

In the comments section below, both the Employee and Direct Supervisor should specify at least one area the employee excelled and one area the employee can further develop.

8

Employee

2 - Solid Performer

9

Add your comments

- 10. Click **save** to save progress or click **save & close** at the top of the Competencies section to move to the next review section.

10

save

reset

cancel

10

save & close

print

help

UKG: Complete Annual Employee Performance Discussion

11. To complete the Open Ended Questions section, click the second **Start** button.

Review sections		
	Employee Rating	Manager Rating
✔ Competencies Completed	2 - Solid Performer	—
Open Ended Questions	N/A	N/A
Overall Comments	N/A	N/A
Final Score	2 - Solid Performer	—

11

Edit

Start

Start

12. Review the employee's comments in the following sections: areas of strong performance, areas to seek improvement, additional experience, training or education and where you as the manager can lend additional support.

Add your comments in the manager comments box.

edit labels save reset cancel sa

Open Ended Questions

1. ▾ Areas of demonstrated strong performance:

Add your comments

12

13. To add Overall Comments, click the final **Start** button.

Review sections		
	Employee Rating	Manager Rating
✔ Competencies Completed	2 - Solid Performer	—
Open Ended Questions	N/A	N/A
Overall Comments	N/A	N/A
Final Score	2 - Solid Performer	—

13

Edit

Start

UKG: Complete Annual Employee Performance Discussion

14. Review the employee's Overall Comments, including their final thoughts regarding their performance as well as any feedback for you concerning additional support.

15. Enter your overall comments.

16. Click **save & close**.

Overall Comments

This comment is for any other feedback you wish to provide. It may be further clarification on goals and competencies or it may be something unrelated that you just want to make sure is included. This comment will be viewable as part of the approved review.

Comment:

Add your comments

15 →

16 → save & close

17. A final score will calculate. The score is an average from the ratings given for Overall Performance and Core Values, from the Competencies section.

18. If you wish to change this score, click Override and select the appropriate, revised final score from the drop-down menu.

***Note:** The Final Score should be a culmination of the employees HEARTS score and Overall Performance. The Final Score is at the manager's discretion. Refer to the Leader Guide for the Anticipated Distribution of Scores information. Human Resources will partner with you to discuss performance improvement plans for any employee with a final score of 1 – Needs Improvement.

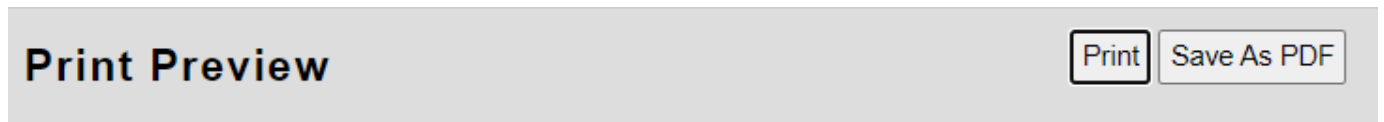
Review sections			
	Employee Rating	Manager Rating	
✓ Competencies Completed	2 - Solid Performer	2 - Solid Performer	Edit
Open Ended Questions	N/A	N/A	Start
Overall Comments	N/A	N/A	Start
Final Score	2 - Solid Performer	2 - Solid Performer	17 → 18 → Override

UKG: Complete Annual Employee Performance Discussion

19. Schedule and Conduct the Performance Discussion with your employee.
20. If you would like to provide your employee a printed or PDF copy of the performance discussion, navigate back to the review and select **Print Full Review**.



21. Select **Print** or **Save As PDF** to save a copy of the Performance Discussion to your computer.



22. *After you have met with the employee*, click **Send** to forward the document to your employee for electronic signature/acknowledge of the discussion.

- **Do not click Send** until you have conducted the Performance Development conversation.
- **Once you click send, the employee will receive an email notification instructing them to sign the final Performance Discussion.**
- There is an option to pull the Performance Development Discussion document back to the Supervisor/Manager's queue for revision. Please work with your HR Business Partner if you need the documentation back.



23. After the employee has electronically signed, the final step is for **managers to electronically sign**. Once the supervisor/manager has electronically signed and acknowledged, the discussion documentation will be considered finalized.