Online Performance Review (OPR) Reference Guide

The Online Performance Review (OPR) system is used to manage the six steps of the performance review process. Once a review has gone through the complete process in OPR, it becomes a permanent part of the personnel file in IRIS and remains available for viewing in OPR for up to two years.

Note: To prevent connectivity issues, please do not use OPR while connected to Remote Desktop.

Getting Started

The OPR home page includes:
- Dropdown menu to select the review type, including up to two years of prior reviews that were completed in OPR
- A list of any action items needing your attention
- A list of your direct reports, if applicable

The Performance Review Process

OPR is designed to follow the University's standard performance review policies, as reflected in the six steps outlined below. Your department or organization may adapt additional processes beyond those described here. For the purposes of OPR, the term *final approver* refers to the individual responsible for signing off on the final review. This is typically the "two-up" manager (two levels up from the employee being reviewed), but may vary in some circumstances.

Note: The process for employees begins with Step 3b on page 5.

1. The supervisor drafts the performance review.

The supervisor initiates the review process.

    a. Select **Actions** next to the employee record.

        Actions ▾

    b. Refer to the table below.

If you want to...	Then...
Start the review process with a blank form	Select **Start New**. ✏ Start New
Import entries from a previous review into the current review	i. Select **Start From Previous**. ⬇ Start From Previous ii. In the **From** drop-down menu, select the review you wish to use as a basis for the current review. iii. Select **Import Review**. **From:** 2019 Annual Performance Review ∨ ➔ **To:** 2020 Midyear Performance Review ∨ ⬇ Import Review
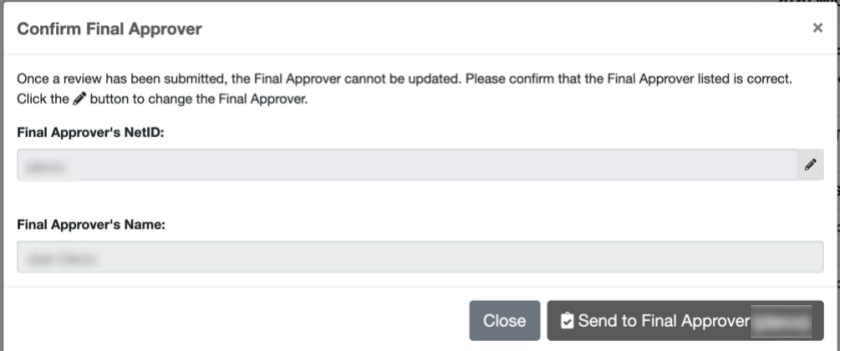
> **Note:** While editing a review, you have up to 20 minutes to make your selections during a single session for security and data integrity purposes. You will be prompted to extend your session if you need more time. Otherwise, you will be signed out of the app when the timer expires, and any unsaved changes will be lost.

    c. Select the rating for each category.

    d. Add **Supervisor's Comments** to support the overall review and/or as documentation for the ratings of 1 or 5.

    e. If needed, upload any relevant PDF files to the **Supporting Documents** area.

    f. Add or import goals and objectives, as needed:

If you want to...	Then...
Add a new goal/objective for the employee to start working toward	i. In the **New Goals and Objectives** section, select **Add New Goal**. ii. Describe the goal in the **Goals and Objectives** textbox. iii. Select a date for the time frame. This could be the estimated time of accomplishing the goal or the expected date for an update on progress. iv. In the **Goal Evaluation** textbox, enter the method(s) or indicator(s) that will be used to evaluate the goal, if known at this time. v. Select **Save New Goal**.
Import a goal/objective from a previous review to update progress or adjust	i. In the **In-Progress Goals and Objectives** section, select **Import a Goal**. This option is only available if a prior review has been completed in OPR and included at least one goal.

If you want to...	Then...
	ii. From the **Review Types** drop-down, select the previous review containing the goal you wish to import.
	iii. Select the checkbox(es) next to the goal(s) you wish to import.
	iv. Select **Import goal**.
	v. If you need to make any updates or changes to the goal, select the pencil icon and revise as needed.

g. Refer to the table below:

If you want to...	Then...
Save the review but not yet move to the next step	Select **Save & Complete Later**. 🖫 Save & Complete Later You can return to the review later in your **Direct Reports** area by selecting **Actions** > **Edit**.
Submit the review draft to your leader for approval	i. Select **Send to Final Approver**. 🗗 Send to Final Approver ii. In the **Confirm Final Approver** popup, ensure the correct approver is listed. If another approver should be used instead for this review, select the pencil icon and update the NetID. iii. Select **Send to Final Approver**. **Confirm Final Approver** ✕ Once a review has been submitted, the Final Approver cannot be updated. Please confirm that the Final Approver listed is correct. Click the ✎ button to change the Final Approver. **Final Approver's NetID:** [____] ✎ **Final Approver's Name:** [____] Close ☑ Send to Final Approver

What happens next? The review goes to the leader/final approver for evaluation. The final approver can either approve the review or return it to the supervisor for revisions.

2. The final approver reviews the draft.

The leader/final approver reads the performance review and decides if it is ready to be sent to the employee.

    a. Select **Actions** next to the employee record.

        Actions ▾

    b. Select **View Review** to go over the manager's ratings and comments.

    c. Refer to the table below:

If you want to...	Then...
Agree with the review and move forward with the process	Select **Approve Performance Review**. This sends the review back to the supervisor to move to the next step. 👍 Approve Performance Review
See one or more changes made to the review	Select **Disapprove Performance Review**. This sends the review back to the supervisor for additional edits. The supervisor returns to step 1. 🚫 Disapprove Performance Review

Note: You can also approve or reject the review directly from the Actions screen.

What happens next? The leader/final approver either approves or disapproves the review and returns it to the supervisor. If disapproved, the supervisor will need to edit the review and submit it to the final approver again.

3a. The supervisor releases the review to the employee.

The manager makes the performance review available to the employee for review and comments.

    a. Select **Actions** next to the employee record.

        Actions ▾

    b. Refer to the table below:

If you want to...	Then...
Make the review available to the employee	Select **Release to Employee**. ↪ Release to Employee
View the review prior to releasing to the employee	Select **View Review**. 👁 View Review

    c. Schedule time to meet with the employee to discuss performance.

What happens next? The review is sent to the employee for review and digital signing. You should also plan to meet with the employee to discuss the performance review. Using OPR does not remove the requirement to meet with the employee to discuss performance.

3b. The supervisor and employee meet to discuss the employee's performance review.

The supervisor and employee meet one-on-one to discuss the employee's performance.

> *What happens next?* After the performance review meeting, the employee adds comments, goals, and/or supporting documents, if desired, and then digitally signs the review.

4. The employee adds any comments, goals, or supporting documents, and signs the review.

The employee views the review, adds comments and/or goal evaluations, and digitally signs the review.

Once your supervisor and leadership have agreed upon the ratings and comments in your performance review, you will receive an email notifying you that your performance review is ready for you to view.

    a.   In the **Action Items** section, select **View My Review**.
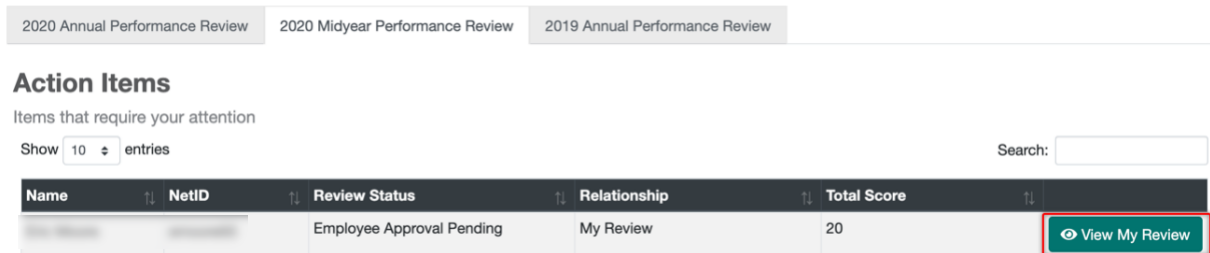
    b.   View the ratings, comments, and goals provided by your supervisor. Notice the total **Review Score** provided along the right side of the page.

> **Note:** While displaying your review, you have up to 20 minutes to view it during a single session for security and data integrity purposes. You will be prompted to extend your session if you need more time. Otherwise, you will be signed out of the app when the timer expires, and any unsaved changes will be lost.

    c.   Meet with your supervisor to discuss your performance review.

    d.   Refer to the table below:

If you want to...	Then...
Acknowledge and sign the review as is, without adding any comments, supporting documents, or goals	Select **Digitally Sign**. This submits the review to the final approver (jumping to step 6). [⟳ Digitally Sign]
Add comments, goals, and/or PDF documentation to be retained with your review *(the supervisor can make changes to the review after this step, if needed)*	i. Select **Add Comments and Goals** at the bottom of the review. [☑ Add Comments and Goals] ii. In the **Employee's Comments** textbox, enter any comments you would like to submit with the review. iii. Under **Supporting Documents**, select **Browse** if you would like to attach any supporting PDF files to the review. iv. In the **Goals and Objectives** sections, you can: • Import a goal from a previous review that was completed in the OPR system, if any. Select **Import a**

If you want to...	Then...

Goal, select the previous review from which to import, and select the checkbox(es) next to the goal(s) you wish to import. You can then use the pencil icon to update or adjust the goal, if needed.

- Add a new goal to begin working toward. This is typically a goal that has not been included in a previous review in OPR. Select **Add New Goal**, describe the goal, set a timeframe you expect to complete the goal or update the status, describe how you will evaluate your progress, and save the goal.

v. **To sign your review and save your comments, supporting documents, and/or goals,** select **Sign & Submit Responses**.

To return the review to your supervisor without signing it, (for example, to consider revisions), select **Send Back to Supervisor**. This saves any comments, documents, or goals you may have added, and then returns the review to your supervisor, who can then make changes, if needed, and resubmit to you for signing.

To finish your review later, select **Save & Complete Later**.

Employee's Comments: (Employees may provide additional comments to be retained with this document in the peronnel file.)

Supporting Documents
PDF documents only; max filesize of 25MB
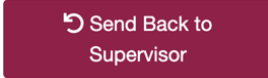
Browse...

Goals and Objectives

- The Goals & Objectives should include both departmental goals and plans for personal and professional development.
- The time frame indicates when the goal should be accomplished
- Evaluation indicates how accomplishment will be measured

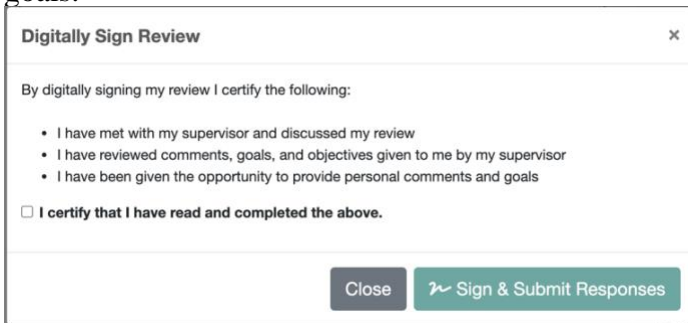| Goals and Objectives	Time Frame	Evaluation	
Serve as PM on at least two projects involving multiple teams.	2020-11-10		✏️ ❌

💾 Save & Complete Later	〰 Sign & Submit Responses	↺ Send Back to Supervisor

Return the review to your supervisor unsigned (e.g., to	Select **Send Back to Supervisor**. This returns the review to your supervisor, who can then make changes, if needed, and resubmit to

If you want to...	Then...
request revisions), without adding comments, goals, or supporting documents	you for signing. ↺ Send Back to Supervisor

vi. Upon signing your review, a popup confirmation will appear, prompting you to agree that you have met with your supervisor to discuss your review; reviewed comments, goals, and objectives given to you by your supervisor; and had an opportunity to provide personal comments and goals.

Digitally Sign Review ×

By digitally signing my review I certify the following:

- I have met with my supervisor and discussed my review
- I have reviewed comments, goals, and objectives given to me by my supervisor
- I have been given the opportunity to provide personal comments and goals

☐ I certify that I have read and completed the above.

Close   ↝ Sign & Submit Responses

What happens next? If you signed your review without adding comments, goals, or supporting documents, it will be submitted to the final approver (typically, the individual to whom your supervisor reports). If you added comments, goals, or supporting documents when signing your review, or if you selected the option to send the review back to your supervisor, it will be submitted to your supervisor, who will either return it to you with any necessary revisions or submit it to the final approver.
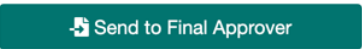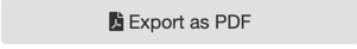
5. The supervisor reviews the signed/commented review and submits to the final approver.

The supervisor gives the review a final look and either sends it to the final approver or makes additional changes and sends it back to the employee for review.

a. Select **Actions** next to the employee record.

Actions ▾

b. Refer to the table below:

If you want to...	Then...
Look at the review again	Select **View Review**. 👁 View Review
Make changes to the review	Select **Edit Review** and make the necessary revisions. ✏ Edit Review **Note:** Making changes at this point will return the review to the employee (step 4) for review and approval.
Submit the review for final approval	Select **Send to Final Approver**. ⤴ Send to Final Approver
Save a copy of the review as a PDF	Select **Export as PDF**. 📄 Export as PDF

What happens next? The review goes back to the leader/final approver for a final glance before sending it on to HR. If the supervisor edits the review, it will instead go back to the employee (Step 4) for review and approval.

6. The final approver submits the review to HR.

The leader/final approver gives the review a final look and sends it to HR, after which no further changes can be made.

    a. Select **Actions** next to the employee record.

        [Actions ▾]

    b. Refer to the table below:

If you want to...	Then...
Read the final version of the review	i. Select **View Review**. [👁 View Review] ii. Select **Sign & Release to HR** at the bottom of the review.
Submit the review to HR and close the review process for this employee	Select **Sign & Release to HR**. [✈ Sign & Release to HR]
Return the review to the supervisor for additional edits	Select **Send Back to Supervisor**. [↩ Send Back to Supervisor] **Note:** This returns the review to draft status (Step 1), but with all the previous ratings and comments intact.

What happens next? The review goes to HR and will be uploaded to the employee's file in IRIS.

Managing Reviews

While the instructions above focus on using the **Actions** button to move through the six steps of the overall performance review process, there is another method for managing a specific review: the **Manage** button. Both methods provide access to the same actions and options; however, additional features on the **Manage Review** page include:

- Ability to focus on a single employee's review all on one screen
- Explanatory text accompanying each possible action on a specific employee's review
- A Review Checklist that tracks each step of a specific employee's review in a checklist format

The **Manage Review** screen presents all the possible actions and options throughout a review's lifecycle. Actions are "grayed out" and unavailable when a review has not yet reached that step, another person is responsible for that action (for example, the final approver), or the review has advanced beyond that action item.

The **Review Checklist** identifies and tracks the six steps in the performance review process for the currently selected review.

The **Review Info** describes the currently selected review, including the employee's name, type of review, status, and final approver information. If needed, you can override the Final Approver by selecting the pencil icon and entering the appropriate approver's NetID. You also have an option to export the review to a PDF file, if needed.

## Proxy Access

If you have been given proxy access to another individual in Orgchart Manager, that same access carries over to OPR. This gives you access to that individual's direct report(s).

1. In the *Impersonate a User* area, select the user for which you have proxy access.

2. Select **Impersonate User**. You are now viewing OPR from this individual's perspective and you can manage reviews accordingly.
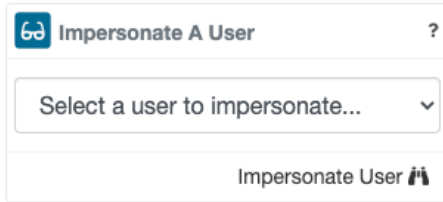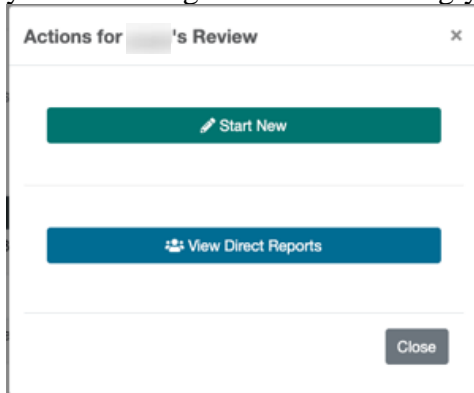

3. To return to your own view, select **Release View** in the *Viewing As* area.
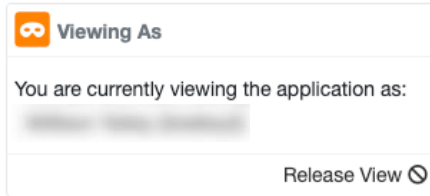
View Direct Reports

Managers and leaders have the option to view OPR from the viewpoint of any of their direct reports. This can be useful if, for example, a director or manager needs to complete performance reviews for employees who report to an unfilled supervisor position.

1. In the list of Direct Reports, select **Actions** next to the manager.
2. Select **View Direct Reports**. You are now viewing OPR from this individual's perspective and you can manage reviews accordingly.

3. To return to your own view, select **Release View** in the *Viewing As* area.