

MANAGER YEAR-END REFERENCE

QUICK REFERENCE GUIDE

As a manager, Year-End is the time to take stock of your employee's accomplishments during the year and document results. During this phase, you can enter comments and ratings related to year-end results for both performance objectives and Leading at Hess Competencies, request feedback for an employee and review employee comments, in preparation for the year-end conversation. You may have different responsibilities depending on if you are a [Direct or Functional \(Matrix\) manager](#).

ACCESSING YOUR YEAR-END PERFORMANCE FORM

To access your Year-End Performance form, do one of the following:

- 1 Click on your **To Do** list on the homepage, or
- 2 Select **Performance and Leading at Hess** from the **Home** menu

TEAM OVERVIEW PAGE

- 3 The **Team Overview** link found in the Performance module displays a list of all of your direct and functional reports in an easy-to-read format. This is where as a manager, you can go to:
 - enter comments into an employee's form, even if the employee has not finalized the form yet;
 - view the status of the employee's form; and
 - for Direct Managers, ask for feedback for specific employees using "Get Feedback."

GET FEEDBACK

- 4 Click **Ask for Feedback** button to request feedback for an individual. Peers of the employee will be displayed in the Recommendation list.
- 5 Select a recommended person or click the **Add Existing Employee** radio button to search for a different person. Click the **Add External Email Address** radio button to request feedback from an external individual and enter their email address. You can customize the Message text if needed.
- 6 Click on the **Send email** button to send a request for feedback.

REVIEWING FEEDBACK

- Click the blue people icon in the **Feedback from Others** column to review received feedback. Review the feedback as you consider writing your own comments or cut and paste, into the employee's year-end review form. Employees will not see any feedback comments unless you copy the comments and paste into the Year-End form.

1 To Do

Employee Year-End Review for James A Halpert

Manager Assessment for Carl Carlton

2 Home

Home

Objectives

Performance and Leading at Hess

Development

Careers

Company Info

My Employee Profile

3 Performance and Leading at Hess

Reviews Team Overview

3 2013 Year End Objective Performance Review

2013 Year End Objective Performance Review

4

Due Fri 12/14/2012 Due Mon 12/31/2012 Due Mon 12/31/2012

My Team	Feedback from Others	Employee Year-End Review	Matrix Manager Feedback	Manager Year-End Review	Signatures
James A Halpert	Ask for Feedback Recommended Now	Past Due		6 unrated items Review James	James and you will sign this later

5 Ask for Feedback about James A Halpert

Send an email to 3-5 people and we will show their feedback with the performance review forms

5

☐ Add existing employee
☐ Add external Email address

Find an employee
Find a person

Or select from the following recommended list

- Phyllis Lapin-Vance
Sales Representative
- Tonia Wilson
Sr Sales Associate
- Winston Martinez
Sales Associate

People:

Message:

Hi ,

In preparation for our company's performance review process, I would appreciate your feedback regarding your work with James A Halpert. Please tell me about James A Halpert's strengths and opportunities for improvement.

6

Cancel Send email

7

My Team Feedback from Others

James A Halpert

You have requested feedback about Barbara from 2 people
add more

MANAGER YEAR-END REFERENCE

QUICK REFERENCE GUIDE

ENTERING YOUR YEAR-END COMMENTS AND RATINGS

- 8 Click on the **Review** button for the desired employee from the Manager Year-End Review column.
- 9 Click in the **Comments** box for each objective to enter remarks. You can enter up to 4,000 characters into each comment field. You can also review the specific details of each individual objective by selecting **Objective Details**. If you entered comments into the employee's Objectives or Mid-Year review, you can copy and paste them into the Year-End form.
- 10 Click on **Self Details/Rating** to view the employee's comments. Note: Employee comments will only be visible once the employee submits their review.
- 11 Click on **Objectives Details** to view the specific objective details including, description, targeted/expected outcomes, weight, start and due dates, status and percent complete. Note: you cannot edit the Functional Managers comments.
- 12 Click on **Other Ratings** to view any comments made by the Functional/Direct Manager. Note: This tab will only display if the other manager has entered comments or ratings.

ENTERING RATINGS

All Direct managers must provide a performance rating against each individual performance objective and each Leading at Hess competency. Note: the Functional Manager cannot enter ratings.

- 13 Select the radio button for the corresponding rating, 1 through 5, for each objective. Hovering over a button at any time will provide the rating description.
- 14 Select the radio button for the overall Leading at Hess rating.

ENTERING AN OVERALL RATING

- 15 Once you have entered individual objective and Leading at Hess ratings, review the calculated rating for guidance.
- 16 Enter a final rating in the performance summary section.
- 17 Click the **Save and Finish Later** button to save your changes.

Click the **Submit for Calibration** button once the employee and functional manager have submitted their comments.

Performance and Leading at Hess

Review Overview

Year End Objective Performance Review

2013 Year End Objective Performance Review

Due Fri 12/14/2012 Due Mon 12/31/2012 Due Mon 12/31/2012

My Team Feedback from Others Employee Year-End Review Matrix Manager Feedback Manager Year-End Review Signatures

James A Halpert Ask for Feedback Recommended Now Past Due 8 6 unrated items Review James James and you will sign this later

2013 Year End Objective Performance Review for James A Halpert

unrated Overall Score 7 Incomplete Items

Introduction

Year-End is the time to take a look at your accomplishments during the year and document results.

Objectives (100%)

Review your progress against your performance objectives and enter comments related to each objective. Be sure to: • Enter your accomplishments for each objective • Describe the impact and value of the accomplishment • Keep your explanation brief and to the point • If an objective contained several tasks or responsibilities, be sure to address each one in your comments It may help to ask yourself these questions as you enter your results: • Did you meet the objective? • Did you achieve the expected result? • Did you complete the objective on time? • Were there extenuating circumstances that prevented you from completing your objective?

Become more accurate with time and process reporting so that our error metrics show < .5 pct error rate year over year. Edit 30.0% of total score On Target

Andrew's Rating 13

Andrew's Comment

Leading at Hess (25%)

Leading at Hess sets the standard for the way we approach our work and interact with each other. Explain how well you exhibited the nine Leading at Hess competencies as you worked towards accomplishing your objectives. Remember that your manager will assess you against the Leading at Hess competencies as part of your overall performance review.

Up Through Band 3 Direction: Demonstrates Courage

Doesn't hold back anything that needs to be said; provides current, direct, complete and "actionable" positive and constructive feedback to others; lets people know where they stand; faces up to people problems on any person or situation (not including direct reports) quickly and directly; is not afraid to take difficult actions when necessary. Recognizes and voices alternative positions; unafraid to ask questions; provides developmental feedback to peers in a constructive and positive manner; communicates candidly with management about possibilities and problems; directly and promptly addresses issues.

Andrew's Rating 14

Up Through Band 3 Direction: Inspires Innovation

Is good at bringing the creative ideas of others to market; has good judgment about which suggestions will work; has a sense about managing the creative process of others; can facilitate effective brainstorming; can project how potential ideas may play out. Willing to challenge established procedures, paradigms; introduces creative ideas through a natural curiosity and inquisitive thinking; considers and communicates future impacts; courageously shares thoughts and opinions; finds ways to include diverse voices into the conversation to ensure the right outcome.

Andrew's Rating

Performance Summary

The Manager's ratings are the "ratings of record" and will not be calculated into the overall form calculation until the form is saved in the system. You may save the form by using the save button in the upper right corner of the form to view the total score, or save at the bottom to exit the form.

James's Manual Rating 3.0

Calculated 3.0 3.0 - Met Expectations

Save and Finish Later

MANAGER YEAR-END REFERENCE

QUICK REFERENCE GUIDE

FINALIZING YEAR-END PROCESS

- 18 When you are ready to complete the entire process, click the **Send for Employee Signature** button. Once sent, employees will be able to view all comments and ratings. This button will be available once the calibration phase is complete.



ENTERING RATINGS FOR US FIELD HOURLY

Managers of US Field Hourly employees must enter the employee's overall performance rating in CareerManager.

- 19 Click on the **Manager Assessment** link for the employee on your **To-Do** list.
- 20 Select the overall rating and then select **Save and Close**.

19



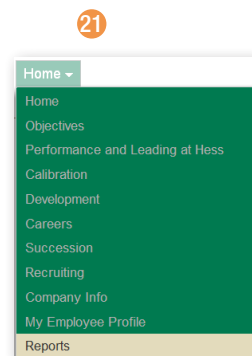
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QUICK REFERENCE GUIDE

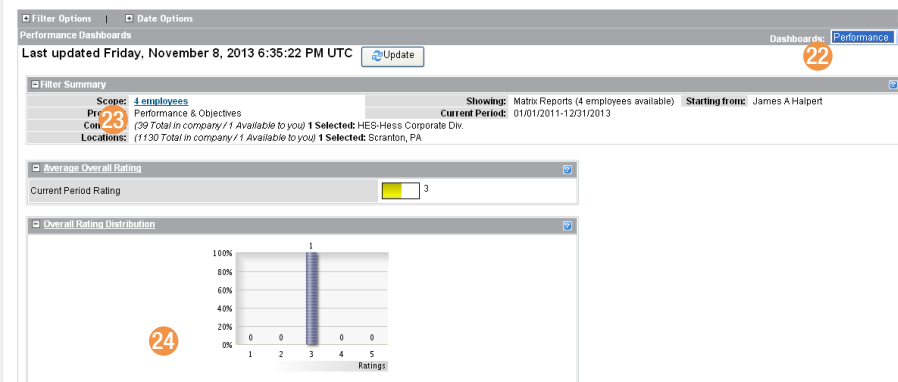
VIEWING DASHBOARDS

As a manager, you can use the dashboards to view rating distribution across your organization, view final performance ratings and check on process status.

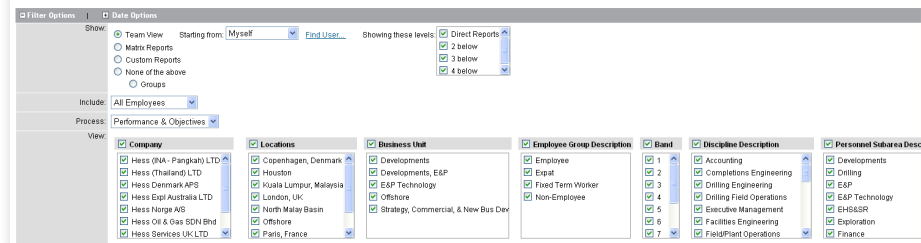
- 21 Click on the **Reports** module from the Home menu to view the your dashboard.
- 22 Be sure you have **Performance** selected from the dashboard list.
- 23 Click on **Filter Options** to indicate the specific dashboard criteria. If you are a Functional (Matrix) Manager, this is where you can indicate that you only want to view your Matrix reports.
- 24 You can see the **Average Overall Rating** and **Overall Rating Distribution**.



Dashboards



Dashboards



MANAGER MATRIX


DIRECT MANAGER

You are responsible for the following related to your *asset & embedded* staff:

- Entering Final Performance Comments/ Review write-up in CareerManager
- Entering Final Performance Rating in CareerManager
- Holding the performance discussion with the employee
- Accountable for near term Training Plans, input to Individual Development Plans and Performance Improvement Plans
- Compensation for asset staff, input to compensation for embedded global services staff

FUNCTIONAL MANAGER

You are responsible for the following related to your *embedded* staff:

- Input to the rating, in the form of  comments/feedback, in CareerManager
- Input to the Performance Review write-up in CareerManager
- Compensation (in NetComp), with input from Asset Leaders
- Primacy for IDPs and longer term development, input to assets for near term training