

# 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

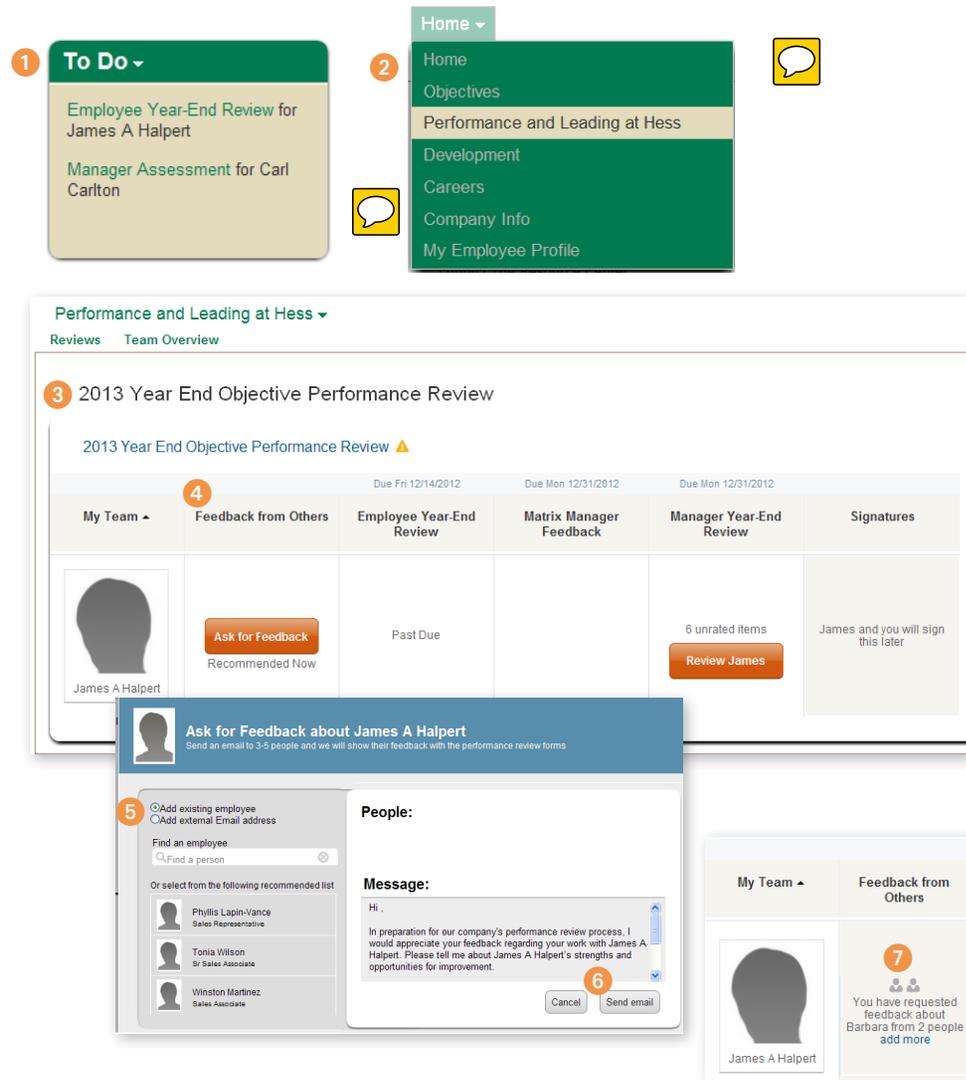
- 3 The **Team Overview** link found in the Performance module displays a list of all of your direct and functional reports in an easy-to-read format. This is where as a manager, you can go to:
  - enter comments into an employee's form, even if the employee has not finalized the form yet;
  - view the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



The screenshot illustrates the user interface for accessing and requesting feedback. It shows the 'To Do' list with 'Employee Year-End Review for James A Halpert' and 'Manager Assessment for Carl Carlton'. The 'Home' menu is open, highlighting 'Performance and Leading at Hess'. The 'Performance and Leading at Hess' page shows a '2013 Year End Objective Performance Review' table with columns for 'My Team', 'Feedback from Others', 'Employee Year-End Review', 'Matrix Manager Feedback', 'Manager Year-End Review', and 'Signatures'. A '2013 Year End Objective Performance Review' card is visible, showing 'Past Due' status and a 'Review James' button. A 'Ask for Feedback about James A Halpert' dialog is open, showing options to 'Add existing employee' or 'Add external Email address', a search field, and a list of recommended people: Phyllis Lapin-Vance (Sales Representative), Tonia Wilson (Sr Sales Associate), and Winston Martinez (Sales Associate). The dialog also includes a 'Message' field and 'Cancel' and 'Send email' buttons.

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### 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.

The screenshot displays the 'Performance and Leading at Hess' interface. At the top, there's a 'Review Team Overview' section. Below it, a table lists review items for '2013 Year End Objective Performance Review' with columns for 'My Team', 'Feedback from Others', 'Employee Year-End Review', 'Matrix Manager Feedback', 'Manager Year-End Review', and 'Signatures'. A callout '8' points to the 'Review James' button. Below the table, a detailed view for 'James A Halpert' shows an 'Overall Score' of 7 and 'Incomplete Items'. The 'Introduction' section explains the purpose of the year-end review. The 'Objectives (100%)' section shows a specific objective: 'Become more accurate with time and process reporting so that our error metrics show < .5 pct error rate year over year.' It displays 'Andrew's Rating' as 13 and includes a 'Self Rating' field with callouts '10', '11', and '12'. Below this, 'Leading at Hess (25%)' section shows two competencies: 'Up Through Band 3 Direction: Demonstrates Courage' (rating 14) and 'Up Through Band 3 Direction: Inspires Innovation'. The 'Performance Summary' section at the bottom shows 'James's Manual Rating' as 16 and a 'Calculated' rating of 3.0. A 'Save and Finish Later' button is visible at the bottom right, with callout '17'.

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### 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

**To Do**

- Employee Year-End Review for James A Halpert
- Manager Assessment for Carl Carlton



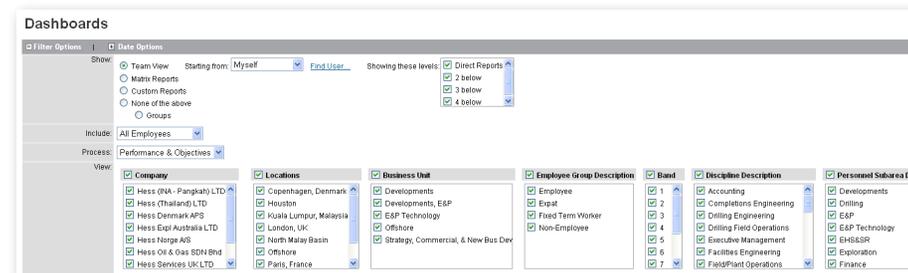
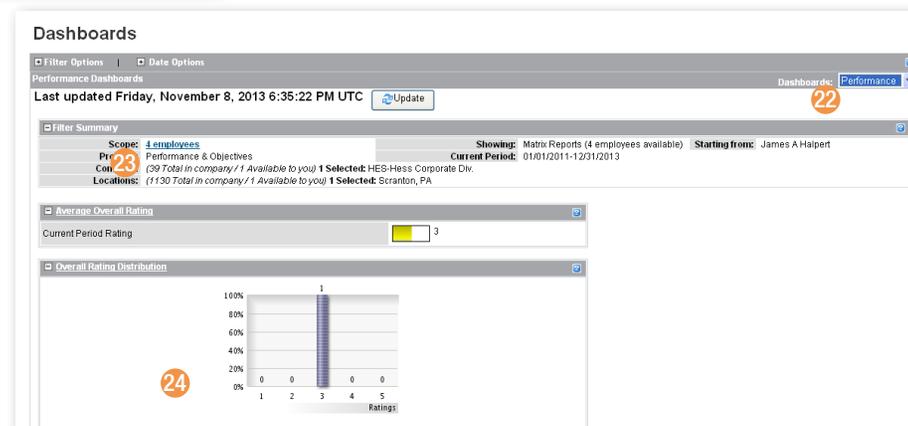
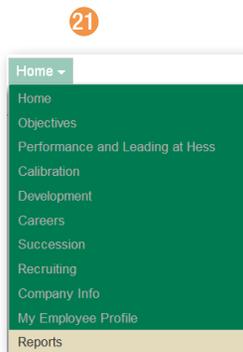
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### VIEWING DASHBOARDS

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**.



## 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