**Develop You – Employee Portal Instructions**

**Goal Setting**

The supervisor schedules a discussion with the employee about upcoming goals. As part of this discussion, you both should review the position's role document (and use it to review performance in the role as part of the performance review). If you need a copy of the role document, please contact HR. If the role document is changed while reviewing it, please send the revised copy to HR.

* The employee opens the app in MyWellesley > Employee Services > Develop You.
* The employee clicks **Identify Supervisor** in the menu bar and fills in the supervisor’s username.
* The employee clicks the **Goals** tab and navigates from goal to goal, saving along the way. Work at your own speed, saving and logging in and out of the portal as many times as needed.
* Goal 1 has an additional **Performance Development** tab to collect the overall plans. It is expected that every employee has an area for improvement. The employee fills in the goal sections, creating at least 3 goals (maximum of 6).
* The employee finalizes his/her goals by clicking the **Finalize** tab and entering his/her name and comments (optional). An e-mail is then sent to the supervisor. If the employee wishes to edit goals after finalizing, the supervisor can "unsubmit" the goals, so that the employee can modify them.
* Next, the supervisor enters the app and clicks **List My Reports**, then clicks an employee’s name. The supervisor reviews each employee’s goals. If goals need to be revised, the supervisor can unsubmit goals in the **List My Reports** view to allow for editing.
* When complete, the supervisor clicks **Supervisor Approval** and enters the employee’s name and comments (optional) to approve the goals.

**Interim Conversation (optional for FY2015)**

The supervisor is encouraged to initiate a mid-year conversation with the employee to review his/her goals.

* The employee opens the app and clicks **Interim Conversation**, then clicks Goal 1-6 and Professional Development, making changes if needed and noting the reasons why changes are being made. **Note:** Goals must first be finalized and approved by the supervisor.
* The employee finalizes the documentation of the interim conversation by clicking the **Finalize** tab and entering his/her name and comments (optional). An e-mail is sent to the supervisor. If the employee wishes to edit goals after finalizing, the supervisor can "unsubmit" the goals so that they can be modified.
* The supervisor reviews and makes any edits to the goals by selecting **Unsubmit** in the **List My Reports** view.
* The supervisor clicks **Supervisor Approval** to approve his/her review of the employee’s goals.

**Self-Assessment**

The self-assessment allows for the employee to reflect on each stated goal.

* The employee opens the app and clicks **Self Assessment**. This allows the employee to review his/her goals and professional development, adding comments and saving. **Note:** Goals must first be finalized and approved by the supervisor.
* When finished, the employee clicks **Finalize** and enters his/her name and comments (optional) and an e-mail will be sent to the supervisor.
* The supervisor opens the app and reviews the employee’s comments, adding additional comments below each goal and in the professional development section.
* When finished, the supervisor clicks **Supervisor Approval** and enters the employee’s name and comments (optional).

**Performance Review**

This phase documents overall performance during the year. **Note:** Use Google Docs or Word to write longer sections of text for ease of composition and to ensure text is saved; the app does NOT auto save your work. You may need to use the “remove formatting” tool shown on the right to keep entries simple.

* The supervisor opens the app, clicks **Direct Reports**, **select an individual**, then clicks on **Performance Review**, then **Review** to add a performance review for each employee and to choose a designation: *Needs Improvement, Meets Expectations, or Exceeds Expectations*. The supervisor can save the review so that the department head can read the supervisor’s review.
* When the review is ready to be shared with the employee, the supervisor clicks **Finalize and make the review available to the staff member** button and an e-mail is sent to the employee.
* The employee may then choose to add a response to the review by using **Employee Comments**.
* The supervisor clicks **Supervisor Approval** and enters the employee’s name and comments (optional).