For supervisors, this job aid shows you how to:

- Read a staff member’s submitted review and use the checklist provided to ensure that you have accessed all information shared and can take it into account as you write your performance review.
- Complete review, ratings and release the review to your staff member.

Login to myHR Learn at learn.northwestern.edu

1. From the homepage, scroll to the REVIEWS section. Click the dropdown arrow next to MY REVIEWS and select REVIEWS I OWN.

2. A list of your staff member’s names will appear. These staff report to you for performance (in myHR) and have Performance Excellence reviews assigned.
   a. If you see a name there in error or do not see a name you expect, please contact the HR Administrator in your area for assistance. If your list requires clean-up, please work with your HR Administrator to confirm that myHR data fields are correct.

3. To view your staff member’s review in depth, click on the blue hyperlinked text: Performance Year 2019-2020 located above your staff member’s name.
4. Your staff member’s Performance Year Review cover page will appear. Click **OPEN FORM** to view your staff member’s review.

![Performance Year Review Form](image)

5. The review form is comprised of various sections: Summary, Getting Started, Attachments, Performance Goals, Professional Development Goals, Values and Behaviors, Self-Review, and Supervisor Review. Scroll down the page to access each section, or use the navigation bar located at the bottom of the page to jump directly to a section. *Please note: To access your staff member’s comments as you move through these sections, click on the drop-down arrow situated next to: **OTHER REVIEWER’S RESPONSES**.*

![Navigation Bar](image)

6. Use the checklist below to navigate the various sections of your staff member’s review:

- **Attachments**: documents which have been uploaded to a review will be visible in the right side ellipsis bar. Click on the ellipsis bar to drop down the menu, click **Attachments** to view documents.

- **Performance Goals**: this section will display active goals and progress on the goals. *It is recommended that staff members enter 2-4 performance goals.*

- **Professional Development Goals**: this section will display professional development goals. *Please note professional development goals are not rated.*

- **Values and Behaviors**: this section will display your staff member’s comments on how they have demonstrated Northwestern values and behaviors. It is recommended that all staff complete this section.

- **Self-Review**: this section will display the staff member’s summary or overview of their own performance.
7. Navigate to the **SUPERVISOR REVIEW** section.
   a. Use the radio buttons to select your rating. Hover over any button to see the rating title.
   b. Enter your review in the comment box. Click on “More” to reveal editing options.

8. To save your comments and rating *without* releasing to Staff, press **CLOSE** in the navigation bar.

9. Click the **SUBMIT AND RELEASE** button located at the top of the Performance Year cover page when you are ready to release the review to your staff member. *It is recommended that you release the review and rating to staff after you have shared the review content and rating with the staff member in the year-end conversation.*

10. The cover page will be refreshed and you can now see your staff member's rating at the top of the cover page.
11. Scroll to the bottom of the cover page and click **SUBMIT** to release the review to your staff member.

12. You will see a **SUCCESS** message appear to confirm that you have submitted and released the review. Click **EXIT**.

13. Your staff member will receive an email alerting them that you have released their review.