First Year Progress Review: Employee Instructions
First Year Progress Review Overview

The first year progress review is an opportunity for managers and employees to have a formal check-in during the one year mandatory probationary period. The first year progress review contains the following steps:

1. The manager and new employee review and discuss the position, expectations, and performance goals—this includes 3 first-year (probationary) goals to be entered in Talent@VCU. One standardized goal applicable to ALL new university employees and one to two additional job-specific SMART goals. Below is the text of VCU’s standard first-year goal:

   *Throughout my first year, I will integrate and familiarize myself with the VCU community, its strategic plan, VCU’s culture of diversity and inclusion, university and department policies and procedures, and my position expectations and standards. I will actively and regularly engage in discussion with my manager and management team about positional and personal expectations and milestones.*

2. After the discussion, the new **employee** should enter these goals into Talent@VCU and submit them for manager approval.
3. The **manager** will then receive an email notifying them the goals are awaiting manager approval; log into Talent@VCU to approve the goals.
4. Throughout the year, the employee will update their progress on goals in Talent@VCU.
5. At the 6 month mark, managers will complete the employee’s six-month progress review in Talent@VCU.
Help Resources

- Talent@VCU Instructional Materials
- Online Help
- Your Human Resources Professional/Consultant
- VCU IT Service Desk
  https://servicedesk.vcu.edu/
  select Talent@VCU
HOW TO SIGN IN AND WELCOME PAGE

NAVIGATION

1. Type URL http://go.vcu.edu/talentatvcu
2. Type your VCU eID and password to sign in

Home Page: Talent@VCU Welcome Page

The Home, Learning, and Performance tabs allow you to navigate to different pages in Talent@VCU. 

**NOTE:** please hover your cursor over the tabs and then click one of the options from the dropdown menu to navigate to that page.

My Action Items, My Inbox, and My Transcript notify you of upcoming performance and learning-related events and tasks.

The Competencies Overview is where you can find the University’s Core and Leadership Competencies.

To navigate back to the home page, click
1) Navigate to the Goals page by hovering over the Performance tab and clicking on Goals.

My Goals Page: On this page you will create, manage, and update your performance goals.

2) Click the create button.
Create Goals Page

3) Fill out all the fields on this screen to enter your SMART goal into Talent@VCU.

NOTE: If Title, Due Date, and Weight are left blank, you cannot submit your goal for approval. **Title**: Create a succinct title to easily identify your goal. **Start Date**: First day of employment. **End Date**: Date of one year of employment. **Weight**: Type value between 1 and 100 **Description**: This is the field where you will write out the complete text of the SMART goal decided upon between you and your manager

**Please remember to include VCU’s standard first year goal!**
**Tasks:** specific actions you and your manager have mapped out to achieve your goal.  
- Weight of all component tasks in a goal must equal 100%  
- When a goal has tasks, the overall progress for that goal is generated by the progress made on the component tasks.

**Attachments:** Documents that support the parameters of your goal or provide information to update your goal.  
- **NOTE:** If you copy any text from another document into the Title or Description fields, images may be added as attachments to your goals. Delete them.

4) After you have finished entering your SMART goal you have two options:
– If your goal is finalized and ready to be published, click “Submit.”  
– If you need to work on your goal further, click “Save as Draft” and all the information you have entered will be saved and available to edit further and finalize the next time you log-in.

**NOTE:** In order for your goal to be sent to be published and available for your manager to see and approve, you MUST click "Submit" first.

5) Please repeat steps 1-4 for each goal SMART goal created during your goal setting conversation.
6) Once you have published all SMART Goals, please go back and double check each one for content, clarity, and accuracy.  
- Spellcheck  
- Proofread titles, descriptions, tasks  
- Make sure all weights add up to 100% (across goals and for component tasks)
HOW TO SUBMIT GOALS FOR MANAGER APPROVAL

After all your SMART goals have been double-checked for accuracy and published by clicking the "submit" button for each one, they are now ready to send to your manager for approval.

1) Click "Send Approval Request"
2) Click "Submit"

The goal submission process is now complete!

For information on how to update goal progress, please refer to pages 11-13 of Talent@VCU Introduction and Goal Instructions.

You can also access a video tutorial that will walk you through the goal entering process here.
EMPLOYEE SIGN-OFF

At the six and 12 month mark, the manager will go in and complete a first year progress review in Talent@VCU. The review will consist of the employee’s SMART goals, VCU’s Core and Leadership (if applicable) competencies, and a comprehensive rating.

**Note about sign-off:** An in-person conversation discussing the results of the review must take place before either the manager or employee can sign-off on the review in Talent@VCU.

1) To complete the sign-off step, scroll down to My Action Items and click “Please complete first year progress review 6-month check-in for X”

![My Action Items table]

<table>
<thead>
<tr>
<th>My Action Items</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please complete first year progress review 6-month check-in for Jane Doe</td>
<td>7/30/2018</td>
</tr>
<tr>
<td></td>
<td>12/31/2018</td>
</tr>
<tr>
<td>Goals: University Probation Goal</td>
<td></td>
</tr>
<tr>
<td>Goals: SMART GOAL</td>
<td></td>
</tr>
</tbody>
</table>

9
First Year Progress Review Overview Page

2) Please read all the instructions on this page carefully.
3) Click “Get Started”

Overview

The first year progress review 6-month check-in is an opportunity for managers and employees to have a formal check-in and document progress during the employee’s probationary year. The review includes the following sections to be completed by both the employee and the manager:

1. A narrative progress update on each of the employee’s SMART goals.
2. Comments to support demonstration of the core and leadership (if applicable) competency behaviors in the achievement of the SMART goals.
3. A comprehensive rating (using the 3-option performance ratings scale), which includes consideration for both goal progress and competency behaviors.

Each employee will be required to complete a self-review before their manager completes the review. Once the manager has completed the review, the manager and employee will meet to discuss its contents and set performance expectations for the remainder of the year. The final step of the mid-year review occurs when the manager and then the employee sign-off on the review in Talent@VCU.

Review Step Progression

4) Click “next” to move through each page of the review to see your manager’s comments and rating.

Sign-off Page

1) Type your name in the box and click “Sign”.
2) Use the comment box to add any additional comments about the performance discussion.
3) Click “Submit”.

Get Started
4) **Click** “submit” on the pop-up window.
5) When submission is complete, you will be redirected to the confirmation page.
INSTRUCTIONS TO ACCESS COMPLETED REVIEWS

1) To open the review, hover your cursor over the Performance tab and click on “Performance Reviews”.

2) Under “My Personal Reviews” make sure the option to show completed and expired tasks is checked.

3) Select the review by clicking on the review name.