First Year Progress Review:
Manager Instructions

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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.

Talent@VCU tips for a successful first year progress review:

1. Update your goal progress. This includes:
   a. Percent complete
   b. Goal comments
   c. Attachments
   d. Tasks
2. Manager should open the Competencies Overview page in a new screen before starting the review task.
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
FIRST YEAR PROGRESS REVIEW
INSTRUCTIONS

1) To open the first year progress review for a selected employee, scroll down to My Action Items and click "Please complete first year progress review 6-month check in for X"

First Year Progress Review Overview Page
On this page, you’ll find
- The review step progression can be found in the middle of the screen. Each time you are prompted to take action in a review, this screen will show you the current step in that process.
- The overview graphic on the left side of the screen shows you what sections of the review you need to complete in this step.

2) Please read all the instructions on this page carefully.
3) To start the review, click Get Started.
First Year Progress Review - Goal Update

4) Read the instructions at the top of the page.
5) Use the comment boxes to provide updates on each of the goals.

NOTE: To access the goal comments and attachments, click the options button.

6) After all goals are updated, move to the next section of the review.
   If you want to save your progress, exit the review, and finish it another time, click “Save and Exit.”
   If you are ready to move to the next page of the review, click “Save and Continue.”
Mid-year Competency Review Page

7) Read the instructions at the top of the page.
8) Answer both questions below by entering your responses in the text/comment boxes.

<table>
<thead>
<tr>
<th>Areas of strength:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments: *</td>
</tr>
<tr>
<td>Enter text here.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities for growth:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments: *</td>
</tr>
</tbody>
</table>

9) After you have finished entering comments, please proceed to the next section of the review.
   If you want to save your progress, exit the review, and finish it another time, click “Save and Exit.”
   If you are ready to move to the next page of the review, click “Save and Continue.”
First Year Progress Review Extension Request

- If you need to extend the probationary period past 12 months, please type "yes" in the comment box.
- If no request is necessary, please write "n/a" in the comment box.
- If you have questions about probationary extensions, please contact Employee Relations at (804) 828-1510.
- **NOTE:** the employee will be able to see this portion of the review.

10) After you answer the probationary extension question, please move to the final section of the review.
   - If you want to save your progress, exit the review, and finish it another time, **click** "Save and Exit."
   - If you are ready to move to the next page of the review, **click** "Save and Continue."

First Year Progress Review Rating

11) Read the instructions at the top of the page.
12) Use the drop down menu to select a rating.

**NOTE:** To locate the ratings scale definitions, click on the circular “?” button.
13) When the review is complete, click “Submit”. If you want to save your progress, exit the review, and finish it another time, click “Save and Exit.”

NOTE: As soon as you submit your review, the employee will receive a notification that it is ready for them to view.

13) Click “Submit”.

14) When submission is complete, you will be redirected to the confirmation page.
Notes 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 open the first year progress review for a selected employee, scroll down to My Action Items and click "Please complete first year progress review 6-month check in for X"

First Year Progress Review Overview Page

1) Please read all the instructions on this page carefully.
2) To start the review, click “Get Started”.

NOTE: If for some reason, you need to make changes to the review, click “Reopen Step”.
3) Click “next” to move through each page of the review (goals, competencies, comprehensive rating).

**Sign-off Page**

4) Type your name in the box and **click** “Sign”.
5) Use the comment box to add any additional comments about the performance discussion.
6) **Click** “Submit”.

**Mid-year Review Manager Sign-off**

Please sign-off on the mid-year review. By signing off you verify that you and your employee have had an in-person conversation to discuss the contents of their mid-year review and have set clear performance expectations for the remainder of the performance cycle.

**Manager**

Lisa Jackson  

**Comment**

Jane and I had a great conversation about all the good work she is doing at VCU. I look forward to seeing what the results of all her hard work at the end of the year.

7) **Click** “submit” on the pop-up window.
8) 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 Assigned Reviews” make sure the option to show completed and expired tasks is checked.
3) Select the review by clicking on the review name.