

# Follow-up Review - Employee

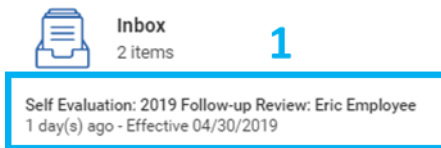
## Overview

The Follow-up Review is required for all employees whose most recent annual evaluation rating indicated that improvement was needed. The follow-up evaluation provides our leaders the opportunity to evaluate your progress towards meeting your goals this year and is a great way to discuss with your manager any tools and/or training that could help you reach your full potential.

**Who Does This:** Employee

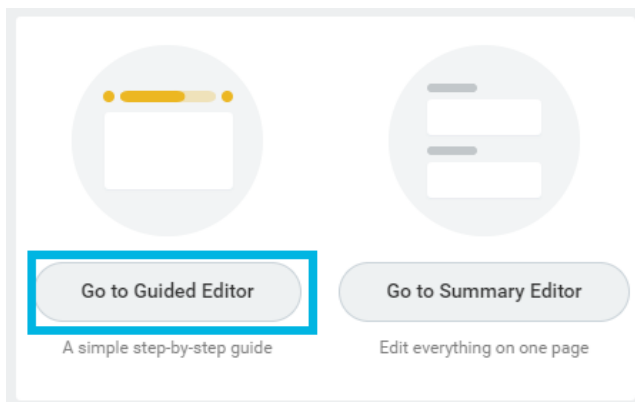
## Things to Know:

- This process occurs once per year for the specific employee population described above. After the Follow-up Review process is launched, those employees will receive an Inbox task to complete your Self Evaluation.
- You are required to include a status and add Comments on your goal outcomes.
- You must submit 4-5 active goals to your leader. Deferred or cancelled goals cannot be submitted. At least one goal must be Developmental.
- Your completed Self Evaluation will route to your Manager for review. Your Manager will add comments and ratings in the Manager Evaluation and meet with you to discuss your Follow-up Review.
- After your performance discussion with your manager, you will receive an Inbox task to acknowledge your completed Follow-up Review. You will have the opportunity to provide final comments at this time.



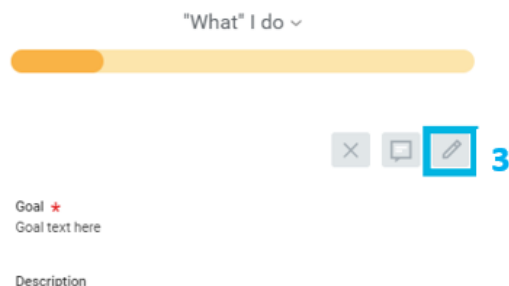
### Step 1

Choose the Inbox task **Self Evaluation: Follow-up Review**.



### Step 2

Choose **Go to Guided Editor**.



### Step 3

Click the pencil icon to update your goal.

The screenshot shows a goal management interface with the following elements and callouts:

- 4:** A text area for the goal description with a rich text editor toolbar.
- 5:** A dropdown menu for the goal status, currently set to "Successfully Complete".
- 6:** A text area for comments on goal outcomes with a rich text editor toolbar.
- 7:** A checkmark icon in the top right corner of the goal card.
- 9:** An orange "Next" button at the bottom of the interface.

**Step 4**  
Review your goal.

Work with your manager if your goal needs to be changed. If you make changes to your goal, the details of the change will be recorded in the activity stream.

**Step 5**  
Review and update the current goal status at this point in the year.

**Step 6**  
Enter required comments on your goal progress, including challenges and accomplishments.

**Step 7**  
Click the check mark icon near the top of the section to save your changes.

**Step 8**  
Repeat steps 4 – 8 above to update remaining goals.

**Step 9**  
Click **Next**.

The screenshot shows a page titled "The 'Way' I do it" with the following elements and callouts:

- 10:** A progress bar at the top of the page.
- 11:** An orange "Next" button at the bottom of the page.

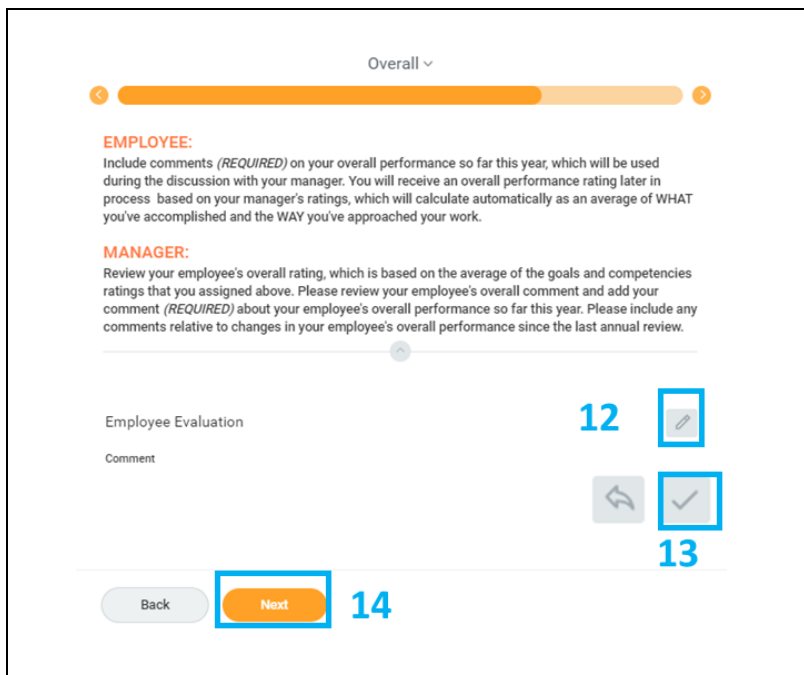
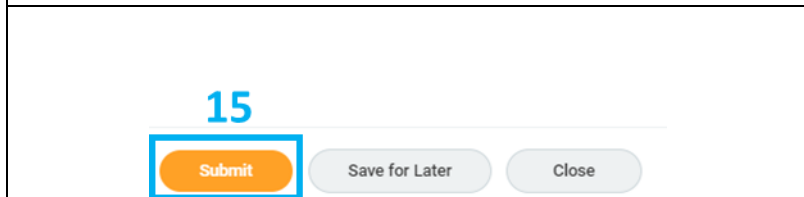
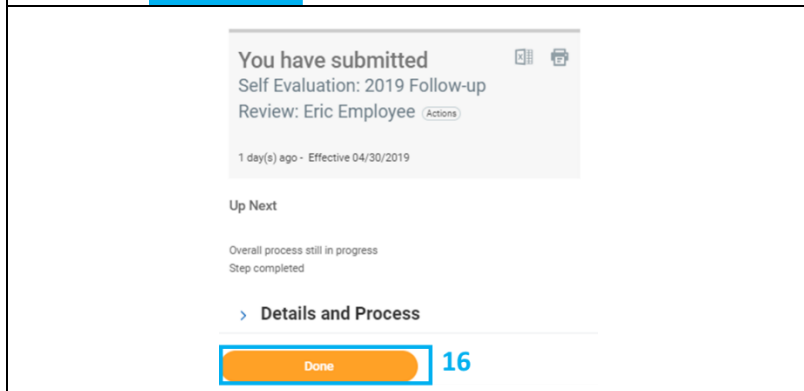
The page content includes:

- A dropdown menu for "The 'Way' I do it".
- A note: "The WAY we work is equally important as WHAT we accomplish. The following five competencies are used to measure the WAY we work." and "Note: This section is editable by manager only."
- Competency: Customer-Centric
- Category: Core Behaviors
- Description: Puts our customers first. Number one priority is to provide an exceptional customer experience before, during, and after the sale of our product and expertise.
- Competency: Collaborative

**Step 10**  
Review each competency and description detailing the "Way" we are expected to work.

**Note: This page is not editable by you. Only your manager can add comments and ratings.**

**Step 11**  
Click **Next**.

	<p><b>Step 12</b> Click the pencil icon to add an overall comment (required) about your performance for the year.</p> <p><b>Step 13</b> Click the check mark icon near the top of the section to save your changes.</p> <p><b>Step 14</b> Click <b>Next</b>.</p>
	<p><b>Step 15</b> Review your annual review and make any changes if desired. If you are satisfied with your work, click <b>Submit</b></p>
	<p><b>Step 18</b> Click <b>Done</b>.</p>

## FAQs

**What if I get an error when I submit my review?** You may get an error message if you do not complete all required fields (\*) during your self-review. You will also get an error if you do not meet the goal requirements. You must submit a status for 4-5 goals. Goals must be active (i.e deferred or cancelled should not be included). One of these goals must be a Development goal.

**What happens next?** Your Self Evaluation: Follow-up Review will route to your Manager. Your Manager will complete the Manager Evaluation and the review will be routed to your manager’s manager for approval. After this is completed, your manager will meet with you to discuss your performance.

**Who can see my Follow-up review?** The review is visible to you, your management chain, and HR.

**Where can I see the completed Follow-up Review?** The Follow-up Review is visible to you in the Talent and Performance worklet and on your Profile in the Performance Profile Group.