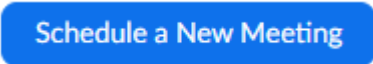


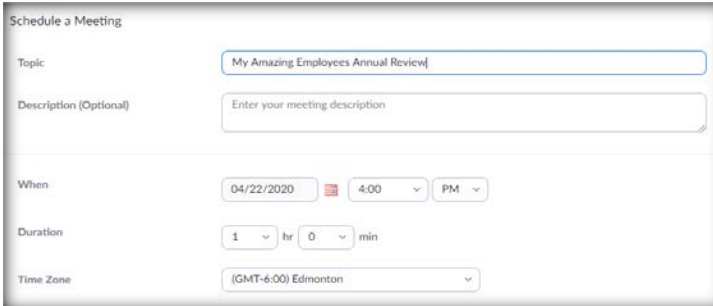
Faculty Tips for Conducting Performance Reviews Remotely

Overview

Performance reviews likely need to take place even if you're working remotely. However, if the performance review is likely to be negative, please contact your HR advisor before proceeding.

Getting Started:

1. Have a conversation with your employee giving them a heads up that this will be occurring and work together to find a time in their day when distractions will be at a minimum.
2. Set up the meeting invite.
 - a. If you need assistance setting up a Zoom account please see the "Adapting Your Workflow During the COVID-19 Pandemic" section through the Office of Faculty Development and Performance – [Setting up a Zoom Account for Virtual Teaching](#)
 - i. Launch Zoom <https://ucalgary.zoom.us/meeting>
 - ii. Click 
 - iii. Enter the information for your meeting.



Schedule a Meeting

Topic: My Amazing Employees Annual Review

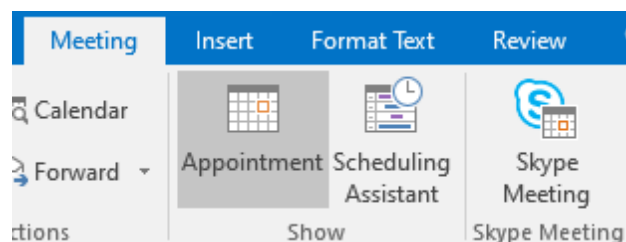
Description (Optional): Enter your meeting description

When: 04/22/2020 4:00 PM

Duration: 1 hr 0 min

Time Zone: (GMT-6:00) Edmonton

- b. If you chose to use Skype for Business
 - i. In Outlook, when you create a new meeting, click the Skype Meeting option.



3. Outline your agenda for the meeting. And ask the employee for an agenda as well.
 - a. If you need assistance to help guide your conversations, Effective Annual Review Conversations - [Leader Guide](#) is available to assist.
4. Have your meeting with video enabled if possible.

At the time of the Meeting:

1. Pay close attention to what your body language is communicating. Nonverbal cues count! Try to keep your eyes on the screen whenever possible.
2. Ensure the tools are working for the both of you. Is the video and sound working? Ask if they have any questions.
3. Review the relevant parts of the performance review form. Discuss challenges and successes. Listen carefully and take notes.
4. Discuss ideas for development/action plan. Because of the virtual format, your language may need to be even more direct than usual.
5. Agree upon specific actions to be taken by each of you.

Ending the meeting

1. Summarize the performance review meeting conversation and explain available supports.
2. Always solicit feedback. As with any conversation, great performance reviews should be a two-way discussion.
3. Recap action items and clarify next steps for your employee.

If you planned it well, this should give both the employee and the manager feedback for future success.

After the meeting

1. After finalizing comments and ratings, managers click "Share with Employee." Once shared, employees can review and acknowledge the completed assessment. The review process won't be complete until the employee acknowledges the manager assessment on my.ucalgary.ca.

Go to: *My work > People Management > Manager Self-Service > Performance Management > Performance Documents > Current Documents > Select an Employee > Finalize Ratings and Comments > Share with Employee*

2. Remind the employee of the deadline to review and acknowledge manager assessments.

Go to: *All About Me > Performance Management > My Performance Documents > Current Documents > Performance Document Support > Review Manager Assessment > Acknowledge.*