

# Third Party Review Guide

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University of Missouri System

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# Third Party Review: Overview

- A third party review can be used in any case where a supervisor would like to get feedback on an employee from someone outside of their reporting line
  - For instance, if an employee has two supervisors (e.g. dual positions or a matrix reporting environment), one manager would likely want the other's feedback
- Third party reviewers are not able to edit the appraisal; they can only provide annotations
- Evaluators can cancel a third party review at any time during the step of the process where the appraisal is drafted



# Third Party Review: Assignment

- If an evaluator would like to get feedback from another person, click on the button **Third Party Review** (top right)
- Search for the name, highlight, and click **Send**
- This can be done before or after evaluator has started drafting

The screenshot shows a web application interface for assigning a Third Party Review. A modal window titled "Third Party Review (optional)" is open, allowing the user to select an employee. The modal contains the following fields and options:

- Buttons: Save Changes, Submit, and Third Party Review (circled in yellow).
- Form fields: Last Name (zzz), First Name (hanna).
- Employee Information: No Filter (dropdown), = None (dropdown), and a Search button.
- Available Employees: 1 result(s) listed as zzz-halogenVicePres, Hanna.
- Show: No Additional Information (dropdown).
- Buttons: Send and Cancel.

The background interface shows a "Rating: Successful" section and a comment field with a "ABC" icon and a plus sign.



# Third Party Review: View Appraisal

- The evaluator cannot work on the appraisal (only view) while out for review

Write appraisals for your employees ✕

Page 1 of 1 | Displaying 1 - 1 of 1

Employee Name ▲	Task
Haley zzz-halogenEmployee	<span>⏸</span> Sent for Review   <a href="#">View Appraisal</a>

Close



# Third Party Review: Cancel

- Cancel third party review to get it back if they have not returned it timely

Write appraisals for your employees Help

Haley zzz-halogenEmployee

FY19 Appraisal Process  
By Hal zzz-halogenManager

[Print](#) | [Employee Records](#) | [Appraisals](#)

**Cancel Review**

**Form Navigator**

- Management Performance Appraisal F
- Demographics
- General Instructions
- Rating Scale
- Success Factors
  - Accountability
  - Collaboration
  - Communication
  - Customer Focus
  - Diversity & Inclusion
  - Judgment
  - Time Management
- Fill in the blank (optional)
- Overall Rating
- Supporting Comments
- New Performance Goals (optional)
- Employee Acknowledgment
- Employee Final Comments

**myPerformance**

### Management Performance Appraisal FY19

**Demographics**

Name: Haley zzz-halogenEmployee	Employee ID:
Job Title: Support Analyst	Supervisor: HalManager
Department:	

**General Instructions**

The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for the coming year. Use the rating scale definitions below to help accurately document performance. Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.

**Rating Scale**



**Third Party Reviewer:  
How to Access the Appraisal and Submit  
Your Review**

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# Access: myPerformance

- From myHR, choose the **Training & Performance** tile
- Log in to myPerformance using your single sign on

The screenshot displays the 'myHR: Employee Self Service' interface. At the top, there is a navigation bar with a home icon, a search icon, a menu icon, and a refresh icon. Below the navigation bar, the text 'UM SYSTEM' is prominently displayed. The main content area is a grid of eight tiles, each representing a different HR function. The tiles are: 'Benefits' (with a heart and money bag icon), 'Careers' (with a magnifying glass over the word 'JOB'), 'Time' (with a person and clock icon), 'Personal Details' (with a document and pencil icon), 'Payroll' (with a stack of money icon and the text 'Last Pay Date 02/28/2019'), 'Employee Actions' (with the University of Missouri seal), 'Additional Employee Info' (with a document and pencil icon), and 'Training & Performance' (with a stack of books and an apple icon). The 'Training & Performance' tile is highlighted with a yellow border. In the bottom right corner of the interface, there is a refresh icon.



# Access: Your Tasks

- If you receive a feedback request as a third party, you will see it on your home screen
- Click on the pending task to access the appraisal form

The screenshot displays the user interface of the myPerformance system. At the top left, there is a navigation menu with a home icon. The header contains the 'myPerformance' logo. The main content area is divided into several sections: a 'Tasks (1) | All Tasks | Settings' section with a highlighted task card for '4/30/19 Provide feedback for an employee appraisal (1 To-Do)'; a 'Shortcuts' section with buttons for 'View Reports' and 'View My Employees'; and a 'Bookmarks' section with links for 'MU myPerformance Webpage' and 'UMKC myPerformance Webpage'.



# Third Party Review: Edit Appraisal

- Click on **Edit Appraisal**

Provide feedback for an employee appraisal ✕

⏪ ⏩ | Page  of 1 | ⏪ ⏩ Displaying 1 - 1 of 1

Employee Name ▲	Task
Haley zzz-halogenEmployee	<input type="radio"/> Edit Appraisal

Close



# Third Party Review: Navigation

- Use the **Form Navigator** to go to specific sections such as Rating Scale or Success Factors
- Use the buttons across the top to **Save Changes** and **Submit** your review
- Annotations to review (if the evaluator added any)

Print Employee Records Appraisals Save Changes Complete

Form Navigator < Annotations to review: 1

myPerformance

Management Performance Appraisal FY19

**Demographics**

Name: Haley zzz-halogenEmployee Employee ID:

Job Title: Support Analyst Supervisor: HalManager

Department:

**General Instructions**

The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for the coming year. Use the rating scale definitions below to help accurately document performance. Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall



# Third Party Review

- Click on the **exclamation icon** to review an annotation
- Add comments regarding the same Success Factor as the annotation if desired

Accountability	Manager	Self
Owns decisions, outcomes, work products, etc. that are within the scope of one's role. <ul style="list-style-type: none"><li>• Ensures employees are aware of own responsibilities and those of others, while integrating all responsibilities to accomplish goals and objectives</li><li>• Measures and tracks performance of individual and/or team(s) against goals and objectives, ensuring each employee contributes to overall outcomes</li><li>• Conducts status updates with employees to manage work, including changes, delays and/or risks; ensures realistic and achievable results; coaches individuals on how to manage expectations</li></ul>	<input type="radio"/> Outstanding <input checked="" type="radio"/> Exceeds Expectations <input type="radio"/> Successful <input type="radio"/> Improvement Expected <input type="radio"/> Unacceptable	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>



Annotation Details ✕

Section: Success Factors MGMT

Previous Annotations: (Most Recent First)

Hal zzz-halogenManager-3/5/19] Annotations can be used during the editing process to communicate with other evaluators.

New Annotation:

Entered By:



# Third Party Review:

- **Save Changes** to continue to work on the draft later
- **Complete** to return the appraisal to the evaluator

Provide feedback for an employee appraisal Help 

Haley zzz-halogenEmployee

FY19 Appraisal Process  
By Hal zzz-halogenManager

 Print |  Employee Records |  Appraisals

 Save Changes  Complete

**Form Navigator** 

- Management Performance Appraisal F
- Demographics
- General Instructions
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  - Collaboration
  - Communication
  - Customer Focus
  - Diversity & Inclusion
  - Judgment
  - Time Management
  - Fill in the blank (optional)

**Overall Rating** Rating: **Successful**

**Supporting Comments**

Use this comment box to provide specific examples that support your Success Factor ratings. A comment is required.

**Self:** Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.

**Comments:** Use the comment box at the end of the appraisal to provide specific examples that support your ratings. An overall comment must be provided.





**Access the Third Party Review Feedback**

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# Third Party Review: Annotations

- Once the Third Party Review is back, review **annotations**, and complete the appraisal

Write appraisals for your employees Help 

Haley zzz-halogenEmployee

FY19 Appraisal Process  
By Hal zzz-halogenManager

       

Print Spelling Check Language Employee Records Appraisals Save Changes Submit Third Party Review

Form Navigator   Annotations to review: 2

Management Performance Appraisal Form \*Indicates required field

Demographics  
General Instructions  
Rating Scale  
Success Factors  
Accountability  
Collaboration  
Communication  
Customer Focus  
Diversity & Inclusion  
Judgment  
Time Management  
Fill in the blank (optional)  
Overall Rating

  
Management Performance Appraisal FY19

**Demographics**

Name:	<input type="text" value="Haley zzz-halogenEmployee"/>	Employee ID:	<input type="text"/>
Job Title:	<input type="text" value="Support Analyst"/>	Supervisor:	<input type="text" value="HalManager"/>
Department:	<input type="text"/>		



# Third Party Review: Annotations

- Review all annotations to be able to **Submit** for second level approval

The screenshot shows a performance appraisal form with a modal dialog box overlaid. The form has a top navigation bar with icons for Print, Spelling, Check Language, Employee Records, Appraisals, Save Changes, Submit, and Third Party Review. A left sidebar contains a 'Form Navigator' with various sections like Demographics, Rating Scale, Success Factors, Overall Rating, and Employee Final Comments. The main content area is divided into sections: 'scope of one's role', 'Collaboration', and 'Communication'. Each section has a list of bullet points and a rating scale with radio buttons. A modal dialog box is open, displaying the text: 'global.hgncloud.com says You cannot perform this action until you have reviewed all unread annotations.' with an 'OK' button.

Print Spelling Check Language Employee Records Appraisals Save Changes Submit Third Party Review

Form Navigator

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  - Fill in the blank (optional)
- Overall Rating
- Supporting Comments
- New Performance Goals (optional)
- Employee Acknowledgment
- Employee Final Comments

scope of one's role.

- Ensures employees are aware of own responsibilities and those of others, while integrating all responsibilities to accomplish goals and objectives
- Measures and tracks performance of individual and/or team(s) against goals and objectives, ensuring each employee contributes to overall outcomes
- Conducts status updates with employees to manage work, including changes, delays and/or risks; ensures realistic and achievable results; coaches individuals on how to manage expectations

Collaboration

Works inclusively to build trust and accomplish tasks, goals, and initiatives.

- Offers information and support to team members, peers, and leaders and participates in cross-functional/departmental teams
- Communicates effectively within and across teams to streamline efficiency, ensure collaboration, and achieve team goals
- Collaborates with all team members, peers, and leaders to integrate various viewpoints; encourages and acknowledges others' contributions

Communication

Provides information clearly and accurately in various settings, ensuring understanding and participation.

- Determines and delivers the appropriate messages effectively to any level ensuring clarity and understanding
- Understands various audiences and their nuances, adjusting style and content to appeal to their needs; coaches others on how to adjust tone and style when communicating
- Listens actively to determine unstated needs and concerns, verify messages, and clarify expectations; coaches and offers constructive feedback when appropriate

global.hgncloud.com says

You cannot perform this action until you have reviewed all unread annotations.

OK



# Third Party Review: Annotations

- Click on the **annotation icon** to review the annotation

Annotation Details

Section: Success Factors MGMT

Previous Annotations:  
(Most Recent First)

Hanna zzz-halogenVicePres-3/5/19] Third party reviewers can reply to annotations or create new ones.

Hal zzz-halogenManager-3/5/19] Annotations can be used during the editing process to communicate with other evaluators.

New Annotation: |

Entered By:

OK Cancel



# Third Party Review: Considerations

- It is important to note that annotations are viewable to the evaluator conducting the appraisal, and to the second level approver, but not to the employee
- If you wish to make the annotations available to the employee, please copy and paste into the comment section at the end of the appraisal

