

Year-end Performance Evaluation System Guide for Managers

This document is designed to guide you through the steps you will take within the State of Montana Talent system as a manager to complete year-end performance evaluations for your employees.

Overall Process:



Navigation:

1. Login

- a. Go to <https://sabhrsi.mt.gov/>
 - i. Click on the **Talent** button under Quick Links
- b. Login:

If you are logged in on the State network, click the **Company Single Sign-On** button

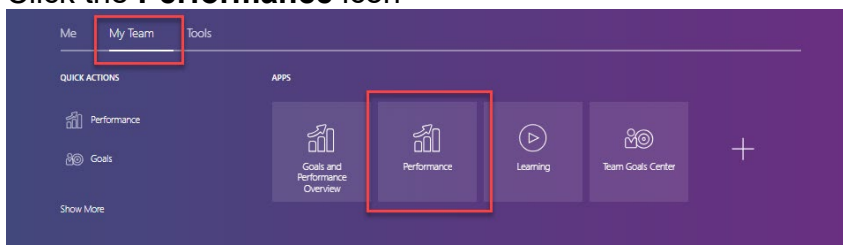
If you are on a mobile device or off the State network, go to sabhrs.mt.gov, click the Talent button under quick links and log in with your username and password:

Username = your employee ID number (6-digit number on your badge, not c#)

Password = if you are a new user OR don't remember your password, click **Forgot Password on the login screen to have an email sent to you with a link to reset your password**

**If you are still having trouble logging in, please email talent@mt.gov.*

2. Click the **My Team** tab
3. Click the **Performance** icon



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4. Click **2024 Employee Year-end Performance Evaluation** for the employee you wish to evaluate

Once the employee has completed the self-evaluation, you will receive an email letting you know it is complete. **Please note, you may begin the manager evaluation prior to the employee completing the self-evaluation, although you won't be able to submit the manager evaluation until the employee has submitted the self-evaluation.** You are now ready to start the goals section of the evaluation.

Review employee goals:

In this section, you will comment on the progress of each goal from the 2024 goal plan.

*NOTE: If you would like to add, edit, or update any of the goals for the 2024 goal plan, click the **Review employee goals** image.*

1 After the employee completes their self-evaluation, you can submit your evaluation.



- a. To add a goal, click the **+Add** button - *Required field: What's your goal? – Click **Add**
- b. To edit an existing goal, click the goal name, then click **Edit Goal, Update**
- c. To update progress, click the goal name and use the Goal Completion progress bar. You may enter comments. Click **Update** to save your goal progress.
- d. To return to the performance document click the back arrow next to your employee's initials

Goal Plan Section:

1. Click a goal to expand it and reveal the **Manager Comments** Textbox
2. Enter your **Manager Comments** in the textbox
 - a. If you do not see the Employee comments, they have not submitted their self-evaluation
3. Once you've commented, click **Save and Next** to go to the next goal in the list.
 - a. If you wish to **not** include a goal on the performance document, click the toggle button – **Not ready for evaluation**
 - i. You will still be able to see and comment on this goal

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4. When you have commented on the last goal, click **Save and Close**.
5. Once you've commented on each goal, scroll down to the Employee Competencies Section

Optional Review Check-Ins:

1. Click the **Show Other Info – this is located under Competencies**
2. Quarterly Check-Ins will be displayed on a pop-up window for your review. Click on the Check-Ins document you would like to review

Competency Section:

In this section you will select a rating and comment on each competency.

1. Click on a competency name
2. Review the employee's rating and comments (comments located below the Manager Comments textbox) on each competency.

The screenshot shows a form titled "Show competency info". It contains the following elements:

- Manager Rating:** A dropdown menu with "Exceeds Expectations" selected.
- Manager Comment:** A large text area with a rich text editor toolbar (bold, italic, underline, link, list, indent, outdent, align, link, unlink).
- Employee Rating:** A dropdown menu with "Exceeds Expectations" selected.
- Employee Comment:** A text area containing the word "Test".
- Required, minimum character limit 1.** A small blue icon and text indicating a requirement for the manager comment.

3. Select a rating for the employee in the **Manager Rating** dropdown and enter your comments regarding the employee's performance in relation to each competency in the **Manager Comments** textbox.
 - a. Click the **Show competency info** link to display the rating definition and ensure you understand the intent of each rating level.
4. Once you have selected a rating and entered a comment, click **Save and Next** to go to the next competency in the list.
5. When you have commented on the last competency, click **Save and Close**.
6. When you are satisfied with the evaluation, click **Submit** at the top of the Manager Evaluation page.

Manager Evaluation of Workers

Actions ▾

Submit

At this point, the employee still cannot see your comments and ratings, if you need an upper-level manager or HR to review prior to releasing to the employee, they now have access to view what you have submitted. Once you are ready to share the evaluation with the employee, move to the next step, Share Performance Document.

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If you want to verify that the self-evaluation was shared to the employee, go to My Team>Performance> Scroll to the **Employee Year-end Performance Evaluation** for the employee you wish to review

The screenshot shows a user interface for a performance evaluation system. At the top, there is a user profile for 'BT' (Becca Tower) with the title '2024 DOA TEST User goal sync'. Below this, a 'Document Progress' bar indicates '2 of 5 tasks' are completed. To the right, a red-bordered box highlights the 'Current Task' as 'Share Performance Document | Due by 12/31/2024'. At the bottom, both 'Employee Rating' and 'Manager Rating' are listed as 'Not rated yet'.



Manager Shares Performance Document with Employee

In this section you will share the completed evaluation with the employee.

1. From the home page, click **My Team**
2. Click **Performance**
3. Click **2024 Employee Performance Evaluation** next to employee's name
4. Click **Share and Release***

The screenshot shows a dark-themed interface for sharing a performance document. At the top, it says '< BT Share Performance Document' with 'Becca Tower' below the name. On the right, there are two buttons: 'Share and Retain' and 'Share and Release'. At the bottom, it displays 'Performance Document 2024 DOA TEST User goal sync' and 'Evaluated By Jane Smith'.

**If you click Share and Retain, you will not be able to continue to the next step until you click Share and Release.*

The employee will now receive an email letting them know that the evaluation is ready for their review. This is a good time to schedule the review meeting if you have not done so already. After the review meeting is held, continue to the next step, Confirm Review Meeting.

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Manager Confirms Review Meeting

You will complete this section after the review meeting has been held. This step records the date of the review meeting.

1. From the home page, click **My Team**
2. Click **Performance**
3. Click **2023 Year-end Performance Evaluation** next to employee's name
4. Select the date you held the review meeting
5. Add comments
6. Click **Confirm**

Congratulations! You have completed the manager portion of the performance evaluation. The employee will now receive an email notifying them to confirm the review meeting date and to provide final feedback.

Be sure to work with your employees to set goals for 2025. For more help with this, see [Goal Management for Managers](#).