Steps for Manager to Finalize Review

Complete the following steps after the Performance Review meeting with the employee
Eric successfully completed the advanced Excel skills class on July 15 to learn how to create pivot tables. He used these skills to create reports to analyze project completion data on a quarterly basis.

The quarterly reports that he has created since learning how to create pivot tables have been excellent, easy to follow with the right amount of data. In addition to the quarterly reports, Eric has used his advanced skills to create additional reports that have proven very helpful during budget time.

As a development opportunity for Eric, I would like him to teach others in the department how to create pivot tables. This would not only develop Eric’s Leadership competency, but increase the team’s expertise and technical knowledge as well.

From the employee’s Performance Review, navigate to the workflow by clicking on “Proceed to comments and rating”.
Once you have met with the employee, click on “Meeting has been completed”

Note, you must have completed the prior three workflow steps: Forward the Review to Next Level Manager, Print Employee Review, and Schedule Meeting with Employee
After completing the Performance Review Meeting, click “Finalize Review”. This will give the employee access to their review in the online system.

Note: Once you finalize the review, you can no longer make edits to the review text.
An email has been sent to your employee, 1111111‐eric.smith@tufts.edu. Once you click finalize, the system will send an email to your employee that the review is ready for them to complete their electronic signature.