



Toronto and Region Conservation Authority (TRCA)

Manager Training Aid – Dayforce Performance

January 2023

Purpose of Manager Training Aid

This training aid will help you understand features of **Dayforce Performance** that you will use in your role as a manager to complete performance reviews for your direct reports during TRCA's Performance process, including:

1. **Line-of-Sight** to your employees' Performance items, such as **Goals/Objectives, Competencies, Reviews** and **Development Plans**.
2. Completing **Review Forms** for your employees.
3. **Approval Process** for review forms.

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Dayforce Performance

Dayforce Performance is designed to support Toronto and Region Conservation Authority (“TRCA”) in its Performance Development process. It includes features to help employees and managers with:

- Goal/Objective Setting
- Competency Development
- Performance and Career Development Planning

TRCA Performance

TRCA’s Performance Development Program is based on open and ongoing dialogue, feedback, and support throughout an employee’s career. Key foundational pillars of the program include:

- Operationalizing employee work activities through Goals/Objectives that are aligned to TRCA’s Strategic Pillars and Strategic Outcomes.
- Formalized Competencies to align individual behavior and actions with TRCA’s Core Behaviours.
- Career and Development Planning with the primary purpose of improving employee job performance and supporting employees to reach short and long-term career development goals.

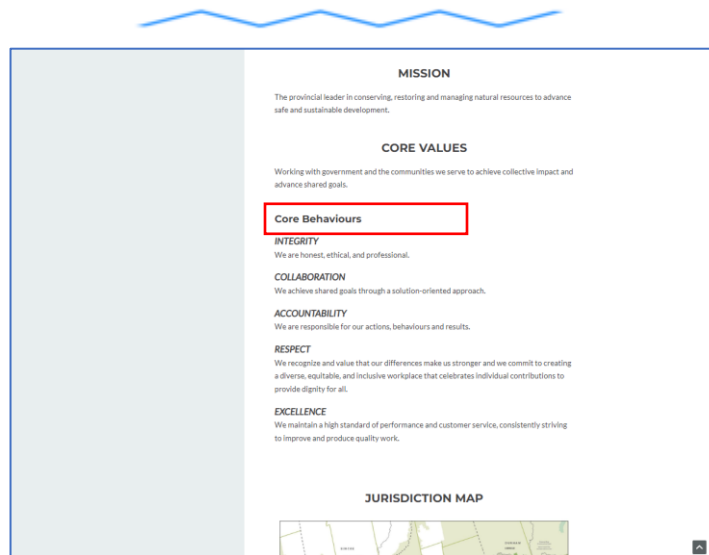
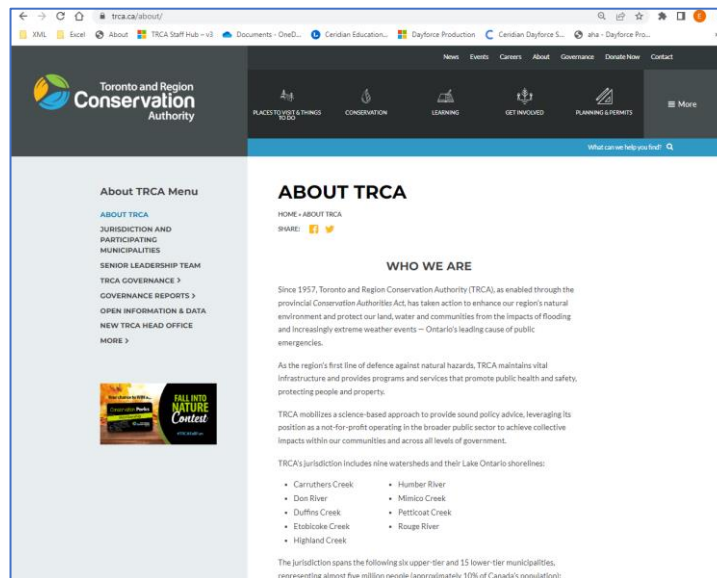
Directional Resources and Related Documents

TRCA's Performance Development Program incorporates elements that are aligned with TRCAs underlying governing mandates and operational objectives.

TRCA Mission, Vision, Core Values and Core Behaviours

Located on TRCA's public website under **About TRCA** webpage, TRCA's Core Behaviours are incorporated in TRCA's Performance Development Program and translate to competencies expected of all employees.

Link to:	TRCA Mission, Vision, Core Values and Core Behaviours
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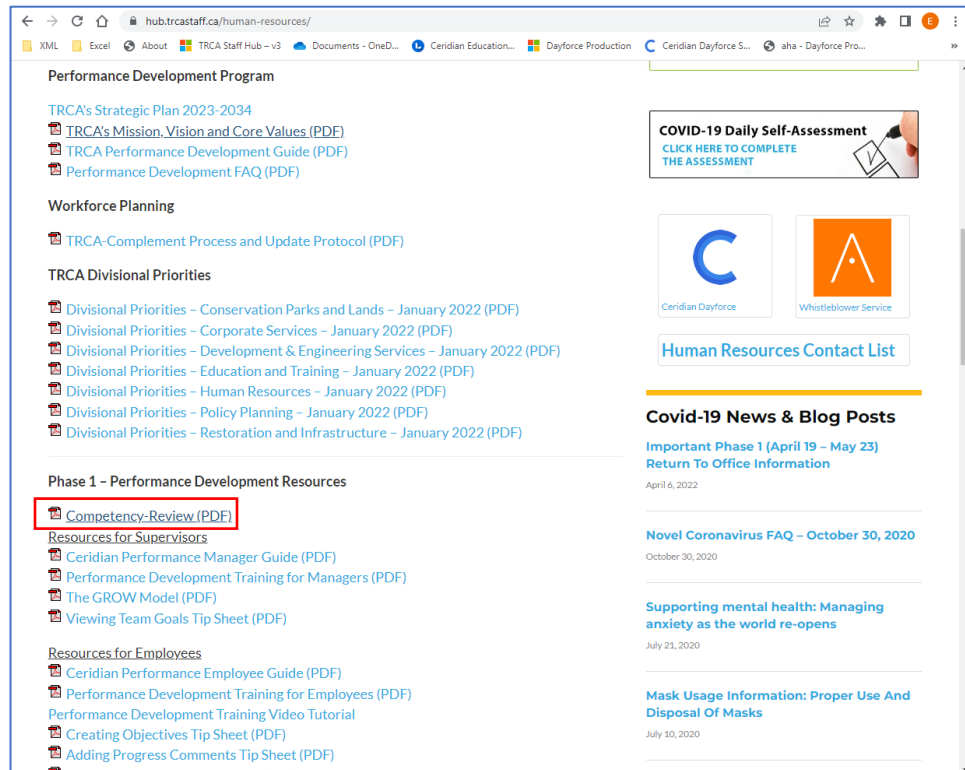


Core Behaviours: Competencies

TRCA's Performance Development Program encompasses formalized Competencies to align individual behavior and actions with TRCA's Core Behaviours.

A detailed outline of Core Behaviours is located on the **Staff Hub** under **Human Resources > Performance Development Resources**.

Link to:	Staff Hub > Human Resources
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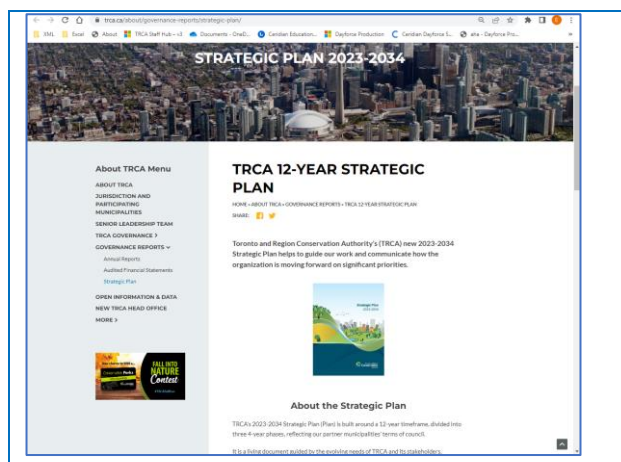
TRCA Strategic Plan 2023-2034 and TRCA Strategic Pillars

Located on TRCA's public website under **About TRCA > Governance Reports** webpage. There is also a link to download a PDF file version of the TRCA 2023-2034 Strategic Plan. The plan is also included on the internal **Strategic Business Planning and Performance** webpage.

It is a living document that guides TRCA towards its desired outcomes. A new plan starting in 2023, it orients around four strategic pillars and 12 strategic outcomes. The four pillars are included in TRCA's Performance Development Program as Goal Categories that must be set for every goal recorded. Core Behaviours are also listed in TRCA's Strategic Plan.

A summarized version of The Strategic Pillars and Strategic Outcomes is also included on the **Staff Hub** website under **CEO Update** in a November 2022 update.

Link to:	Strategic Plan 2023-2034	TRCA Strategic Pillars
Link to:	Strategic Business Planning and Performance	



TRCAStratPlan2023-2034-FA.pdf

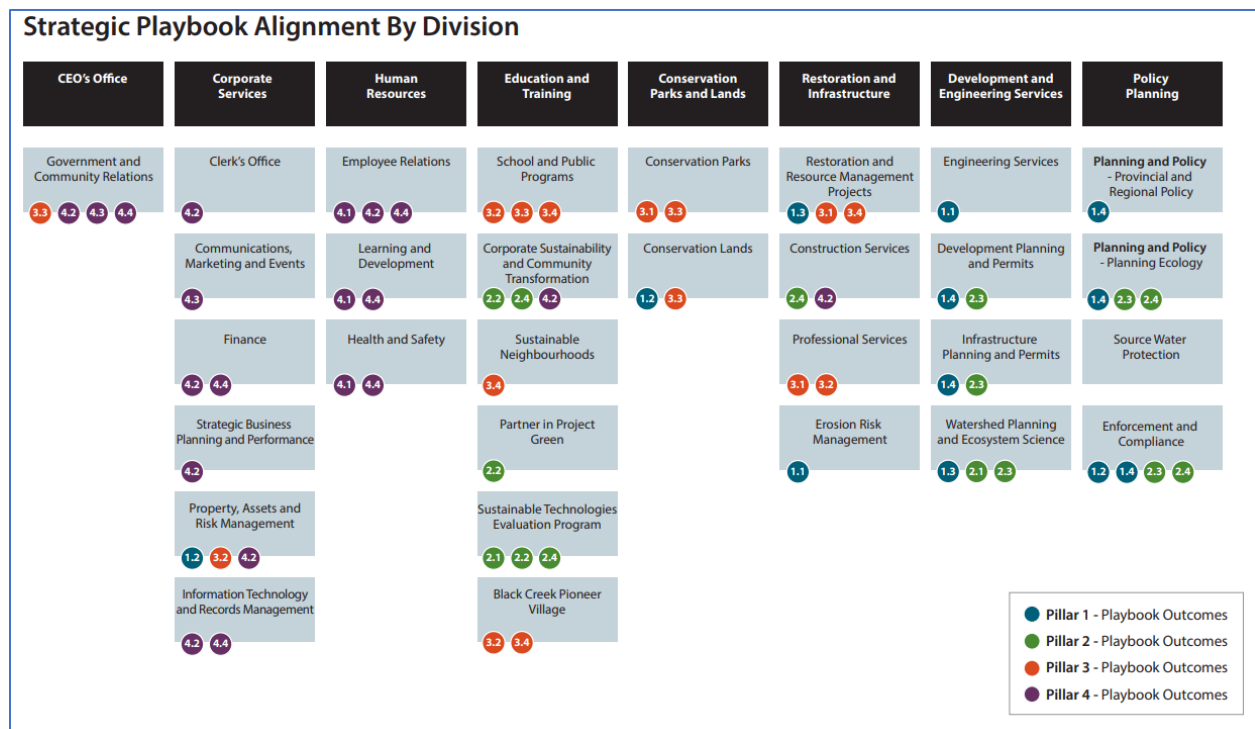
	PILLAR 1 Environmental Protection and Management
<ul style="list-style-type: none"> 1.1 Deliver provincially mandated services pertaining to natural hazards including flood and erosion 1.2 Leadership in greenspace conservation 1.3 Maintain healthy and resilient watershed ecosystems in the face of a changing climate 1.4 Balance development and growth to protect the natural environment ensuring safe sustainable development 	
	PILLAR 2 Knowledge Economy
<ul style="list-style-type: none"> 2.1 Research and development that drives innovation and climate-based solutions 2.2 Collaboration to advance a green transition 2.3 Advocacy and adaptability in the face of policy pressures 2.4 Integrate environmental considerations and science into decision making 	
	PILLAR 3 Community Prosperity
<ul style="list-style-type: none"> 3.1 Connect communities to nature and greenspace 3.2 A culture of diversity, equity and inclusion contributing to community wellbeing 3.3 Informed citizens are conservation champions 3.4 Inspired communities take environmental action 	
	PILLAR 4 Service Excellence
<ul style="list-style-type: none"> 4.1 A strong and skilled workforce 4.2 Provide and manage an efficient and adaptable organization 4.3 Responsive relationships and a trusted brand with a reputation for excellence 4.4 Transparent decision making and accountable results 	

Business Unit Alignment

A Business Unit Alignment Chart that cross references how your division and business unit goals align with the Strategic Plan Pillars and Outcomes.

Located on the Staff Hub website under a January 10, 2023, **CEO Update**.

Link to:	Located on the Staff Hub website under a January 10, 2023, CEO Update webpage. Welcoming 2023 - Business Unit Alignment
Link to:	Located on the Strategic Business Planning and Performance webpage. Strategic Business Planning and Performance <ul style="list-style-type: none"> Business Unit Alignment Chart



Playbook

The Playbook is TRCA's living implementation plan. It operationalizes a 12-year plan into shorter, four-year phases. The Playbook is organized by Pillars and Outcomes and should inform annual business unit planning as well as performance development program objective setting. The Playbook will be updated regularly and is available on the dedicated Staff Hub SBPP hub space page.

Link to:	Located on the Staff Hub website under a January 10, 2023, CEO Update webpage. Welcoming 2023 - Playbook
Link to:	Located on the Strategic Business Planning and Performance webpage. Strategic Business Planning and Performance <ul style="list-style-type: none"> Playbook (Excel)

Strategic Plan - Outcome Statement	Performance Indicator (12 Year)	Action - Annual Steps to Achieve
1.1 Deliver provincially mandated service pertaining to flood and erosion hazards • Conducting all provincially mandated services pertaining to flood, erosion and hazards • Flood Risk Identification, warning, and mitigation • Erosion Inventory & Monitoring • Green Infrastructure & Capital Works Projects • Public Outreach	% of known flood and erosion risks that will be mitigated with active or funded projects	
INFO PROVIDED BY (DIVISION/BUSINESS UNIT) PLAYBOOK IMPACT - FIRST TERM - THIS IS WHAT YOU ARE TRYING TO ACHIEVE IN THE FIRST 4 YEARS TARGET - IMPACT METRIC - YOU WILL REPORT ON THIS AT THE END OF THE FIRST TERM Target # for Term 1 (2026) ACTION - ANNUAL STEPS TO ACHIEVE COLUMN "C"		
RIERM AD	Reduce risks to people and property through a well-managed network of erosion control structures	65% (80% is longer term target) Complete asset management report
RIERM AD	Develop erosion risk mapping and screening tools using high-accuracy remote sensing data (LIDAR, photogrammetry, etc.)	85% Acquire LIDAR or other relevant datasets at a more frequent interval in order to improve erosion risk mapping and accuracy through remote sensing data (LIDAR, photogrammetry, etc.) screening tools
DES. ENGINEERING A D	Meet industry/regulatory/performance standards and criteria for management of TRCA flood-control infrastructure	80% Operate and maintain 12 dams according to regulatory standards
DES. ENGINEERING A D		Develop dam inspection procedures and tools to conduct rigorous inspections
DES. ENGINEERING A D		Train staff to conduct proper inspections of dam structures
DES. ENGINEERING A D		Operate and maintain 8 dikes according to regulatory requirements
DES. ENGINEERING A D		Develop dike inspection procedures and tools to conduct rigorous inspections
DES. ENGINEERING A D		Train staff to conduct proper inspections of dike structures
DES. ENGINEERING A D		Operate and maintain 11.5 km of flood control channels according to regulatory requirements
DES. ENGINEERING A D		Routine cleaning of debris and sediment from

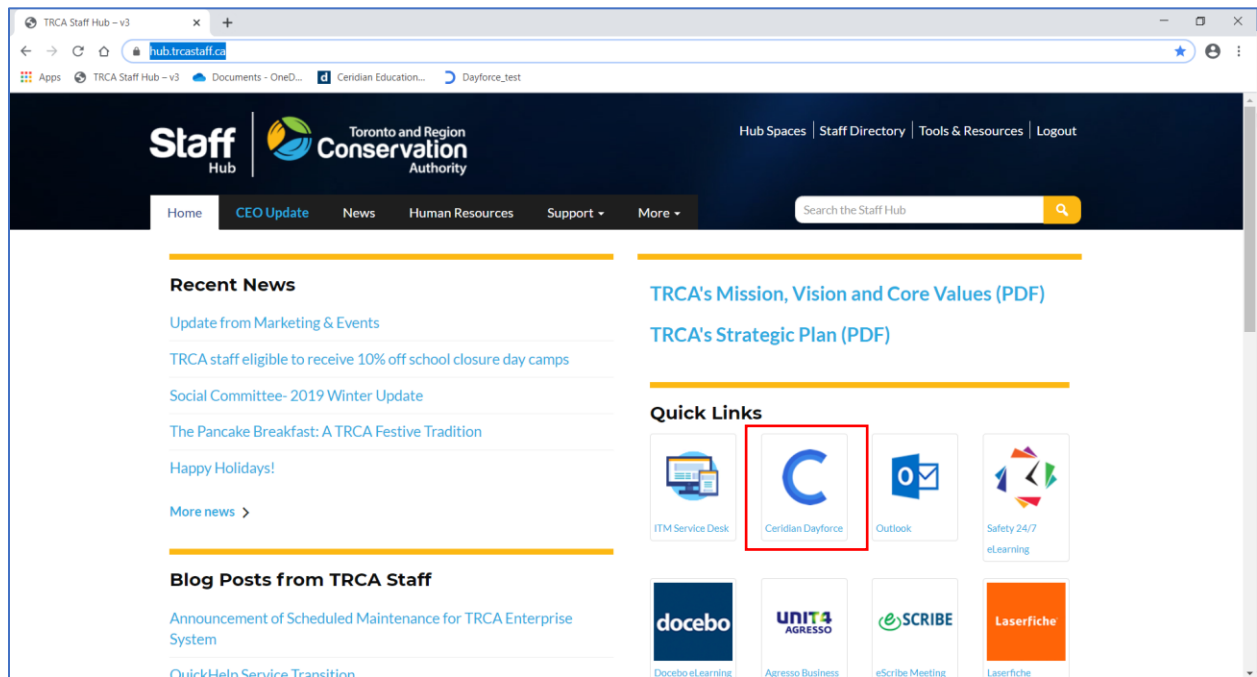
PDF versions of the Paybook specific to your division are also available.

Located on the **Strategic Business Planning and Performance** webpage.

Link to:	<u>Government and Community Services</u>
Link to:	<u>Corporate Services</u>
Link to:	<u>Human Resources</u>
Link to:	<u>Conservation Parks and Lands</u>
Link to:	<u>Restoration and Infrastructure</u>
Link to:	<u>Development and Engineering Services</u>
Link to:	<u>Policy Planning</u>
Link to:	<u>Education and Training</u>

Launching Ceridian Dayforce

You can launch **Dayforce** by clicking on the **Dayforce** link on TRCA's Staff Hub.

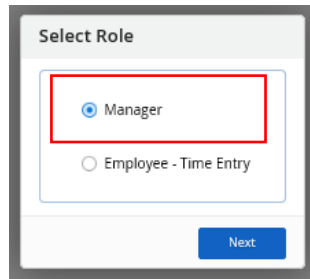


You can also copy and paste the link below into your browser's address bar.

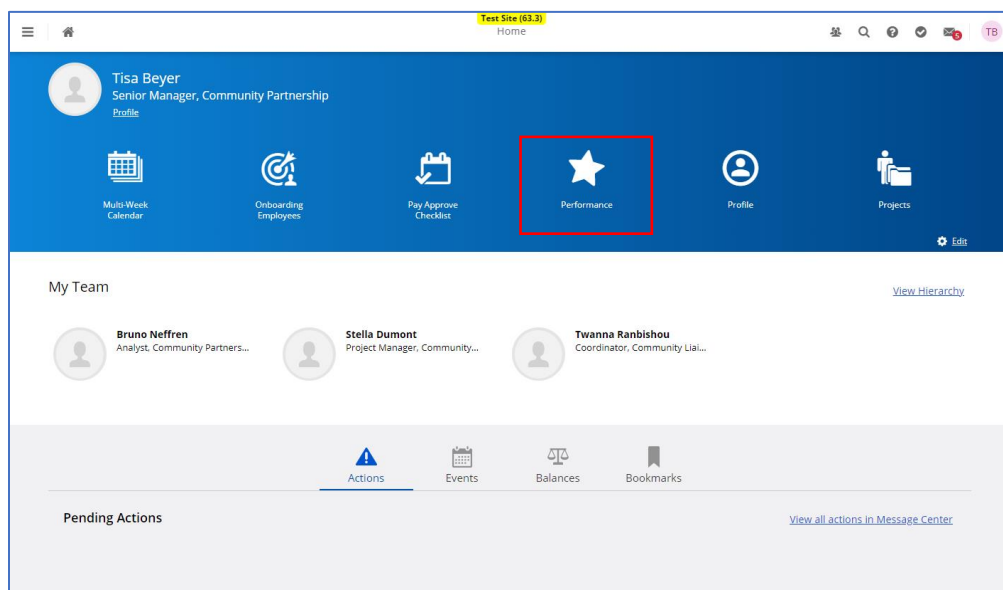
- <http://dayforce.trcastaff.ca/>

Manager Login Role

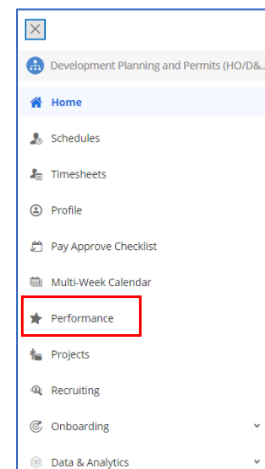
To complete performance reviews for your direct reports – input comments and ratings - you log in under your **Manager** (or **Supervisor**) user role.



Dayforce opens with the **Home** screen displayed. Click the **Performance** icon on the Home screen to access **Dayforce Performance**.



If the icon is not on your screen, click the Menu button (☰) at the top left-hand corner of the screen and select **Performance** from the menu to access **Dayforce Performance**



Dayforce Performance Module Screens for Manager

When you access the Dayforce Performance module under your **Manager** user role, the module includes the following screens. Each screen is a tab.

Goals	Lists your direct reports and the goals they created in their Goals screen.
Competencies	Lists your direct reports and the Competencies that are assigned to them.
Reviews	Includes performance review forms that are assigned to your employees. You use these forms to record comments and ratings for your direct reports.
Development Plans	Includes development plans your employees set up, for example to track career development and performance improvement.




Goals Screen

The **Goals** screen always displays first by default when you access the **Performance** module under your Manager user role.

The screen displays the goals / objectives your employees recorded.

If you are on one of the other screens when you are in the Performance module, click the [Goals](#) button in the ribbon to display the **Goals** screen.

There is a [Team Goals](#) button under the [Goals](#) button, an indication that that you are viewing your team's / employees' (i.e., direct report) goals. The information in this view lists your employee's name and related status details of their goals.

Goals Competencies Reviews Development Plans							
Team Goals							
Period: Current Year		Team: My Direct Reports		Group By: Employees			
▼	 Bruno Neffren Analyst, Community Partners...	Not started 0	In Progress 1	At Risk 2	Overdue 0	Completed 0	Total 3
▼	 Stella Dumont Project Manager, Community...	Not started 0	In Progress 0	At Risk 3	Overdue 0	Completed 0	Total 3
▼	 Twanna Ranbishou Coordinator, Community Liaison...	Not started 0	In Progress 0	At Risk 3	Overdue 0	Completed 0	Total 3

Goals – Period list

You select a value in the **Period** list to filter goals by year based on the Goal Start Date (i.e., 'Previous Year', 'Current Year', 'Next year', 'Future Periods').

The screenshot shows the 'Team Goals' section of the TRCA Performance system. A dropdown menu for 'Period' is open, showing options: 'Future Periods', 'Next Year', 'Current Year' (highlighted), 'Previous Year', and 'Archived'. The main table lists goals for three team members: Bruno Neffren, Stella Dumont, and Twanna Ranbishou. The table columns are: Not started, In Progress, At Risk, Overdue, Completed, and Total.

Team	Not started	In Progress	At Risk	Overdue	Completed	Total
Bruno Neffren Analyst, Community Partners...	0	1	2	0	0	3
Stella Dumont Project Manager, Community...	0	0	3	0	0	3
Twanna Ranbishou Coordinator, Community Liaison...	0	0	3	0	0	3

Goal Start Date and Due Date – Best Practice

Ensure both the 'Goal Start Date' and 'Due Date' that are recorded by your employee fall in the same calendar year.

Even if the same goal spans multiple years, ensure that your employee records the previous goal entry with a Due Date equal to 'December 31, 20XX' and that a new entry for the goal be recorded for the following year accordingly.

Dayforce Performance does allow dates to be recorded for a goal to span more than one year, but there is a small chance the review form will not pick up the goal when this is the case.

Best practice is that the 'Goal Start Date' and 'Due Date' recorded fall in the same calendar year.

Add Goal

Add Goal - English (US)

Name *

Description

Goal Category *

Select an Option...

Start Date *

1/1/2023

Due Date *

12/31/2023

Measure Type *

Select an Option...

Language

Select the languages that you want this goal to be available in.

☒ English (US)

☐ Français (Canada)

Save as Draft

✓ Finish

Cancel

Displaying Goal Details

You display a list of the goals that your employees are working on by clicking the arrow next to their **Name**. A panel appears for each goal.

The screenshot shows the 'Performance' section of the TRCA system. Under the 'Goals' tab, the 'Team Goals' view is selected. The filters are set to 'Period: Next Year', 'Team: My Direct Reports', and 'Group By: Employees'. A list of employees is shown, with Bruno Neffren selected. His goals are listed below his name:

Goal Name	Period	Not Started	In Progress	At Risk	Overdue	Completed	Total
Goal 1 - 2023	1/1/2023 - 12/31/2023	0	0	0	0	0	3
Goal 2 - 2023	1/1/2023 - 12/31/2023	0	0	0	0	0	3
Goal 3 - 2023	1/1/2023 - 12/31/2023	0	0	0	0	0	3

You display the description / contents of each goal by clicking the arrow next to the **Goal Name**. The panel for the Goal expands.

The screenshot shows the same view as the previous one, but with 'Goal 1 - 2023' expanded. The expanded panel shows the following details:

- Description:** Use the SMART method of create Goals/Objectives.
 - S - specific
 - M - measurable
 - A - attainable
 - R - relevant
 - T - time-based
- Goal Category:** Pillar 2 - Knowledge Economy
- Created By:** Bruno Neffren

Goal Progress

Your *employee* updates the goal **Progress** percentage on their **Goals** screen.

Once the employee makes the update, it is reflected in your view of their goals.

The screenshot displays the 'Performance' section of the TRCA system, specifically the 'Goals' tab. The interface shows a list of goals for Bruno Neffren, an Analyst at Community Partners. The goals are categorized by status: Not started (0), In Progress (3), At Risk (0), Overdue (0), Completed (0), and Total (3). The period is set to 'Next Year' and the team is 'My Direct Reports'. The group is 'Employees'.

Three goals are listed:

- Goal 1 - 2023**: Description: Use the SMART method of create Goals/Objectives. S - specific, M - measurable, A - attainable, R - relevant, T - time-based. Goal Category: Pillar 2 - Knowledge Economy. Created By: Bruno Neffren. Status: In Progress (25%).
- Goal 2 - 2023**: Status: In Progress (25%).
- Goal 3 - 2023**: Status: In Progress (50%).

The progress bars for each goal are shown as a blue bar with a slider. The progress for Goal 1 is 25%, Goal 2 is 25%, and Goal 3 is 50%.

Goal Status

Dayforce automatically displays the progress **status** for each goal by using a colour-coded bar on the left edge of the goal panel.






Gray: Not Started. The goal is 0% completed.

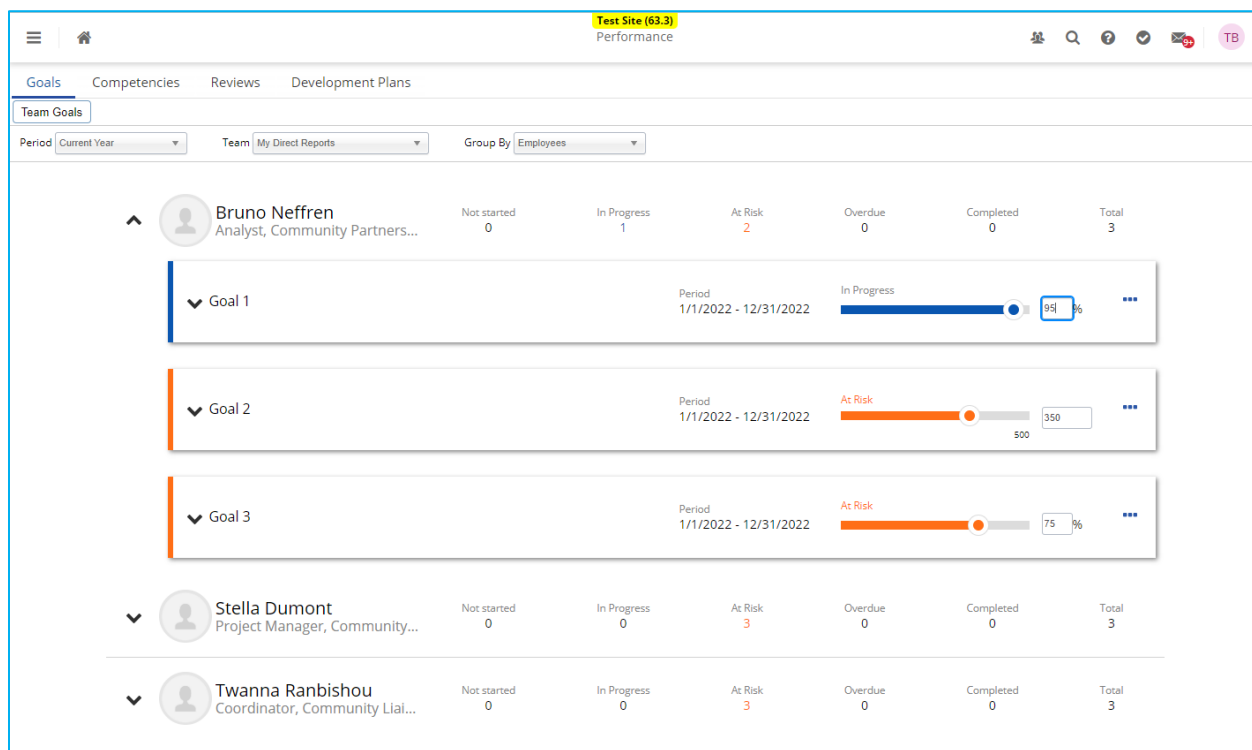
Green: Completed. The goal is 100% completed.

Blue: In Progress. The goal is on track to be completed by the due date.

Red: Overdue. The goal has passed the due date and is not completed.

Orange: At Risk. The goal progress is 10% or more behind the expected progress, calculated by an algorithm that projects progress based on Start Date and the Due Date.

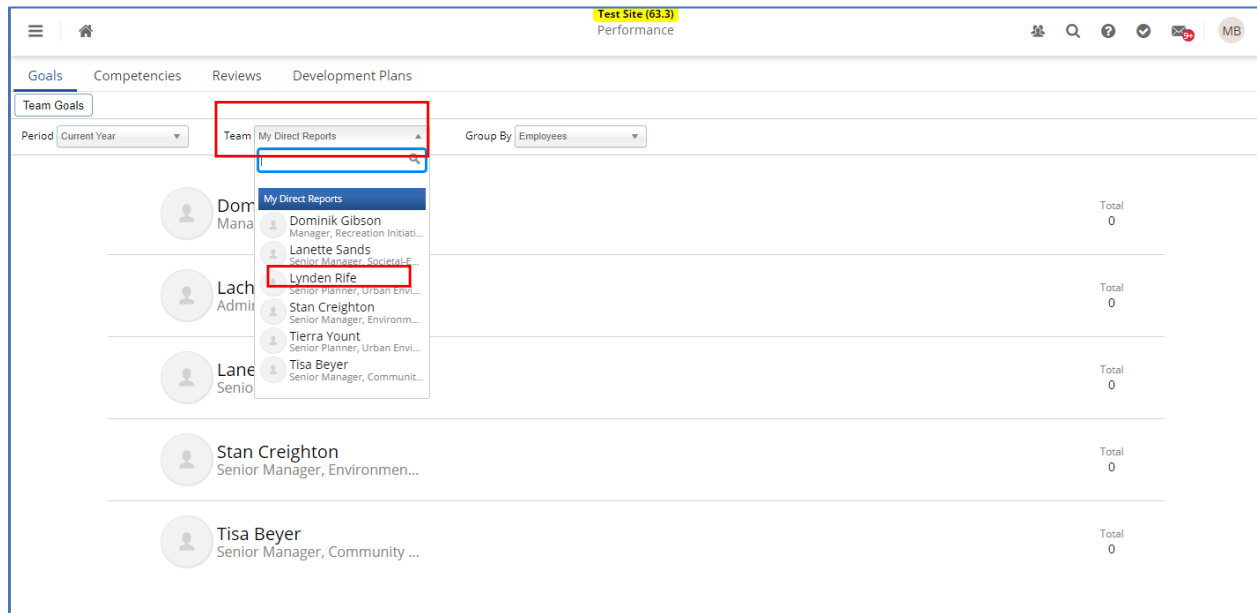
At Risk	The goal progress is 10% or more behind the expected progress.	
Overdue	The goal has passed the due date and is not completed.	
In Progress	The goal is on track to be completed by the due date.	
Not Started	The goal is 0% completed.	
Completed	The goal is 100% completed.	



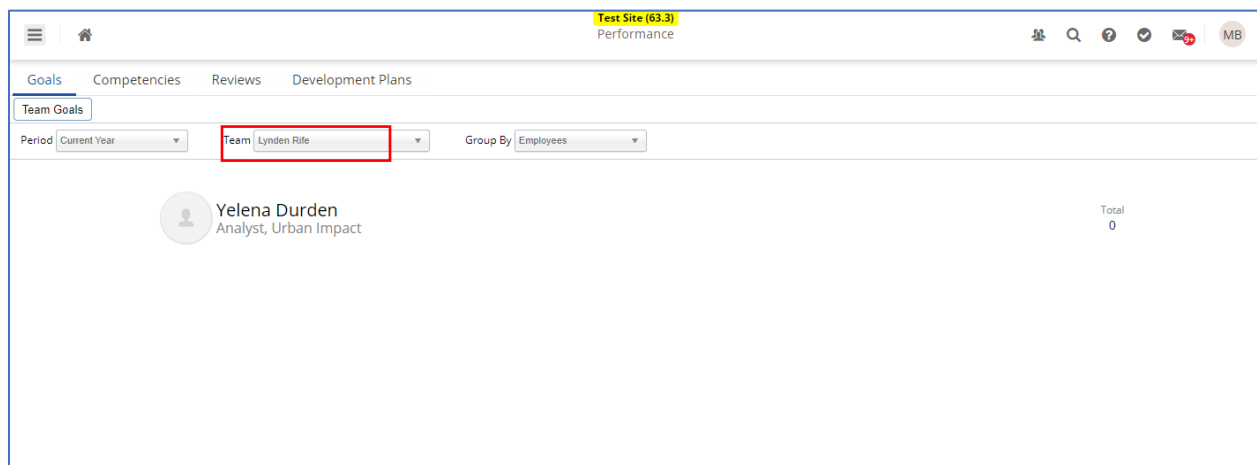
Team List - Span of Control

By default, the employee list shown within the **(Team) Goals** tab displays only the employees that report directly to you. However, you can use the **Team list** to display your indirect employees. This drop-down list displays the names of all the managers that report to you (or to which you have access because of Location Access).

If you have a span of control greater than one level or Location Access, then in the **Team list** drop-down list you can select a name of a manager under you and the application will display that manager's direct reports for the specified period.

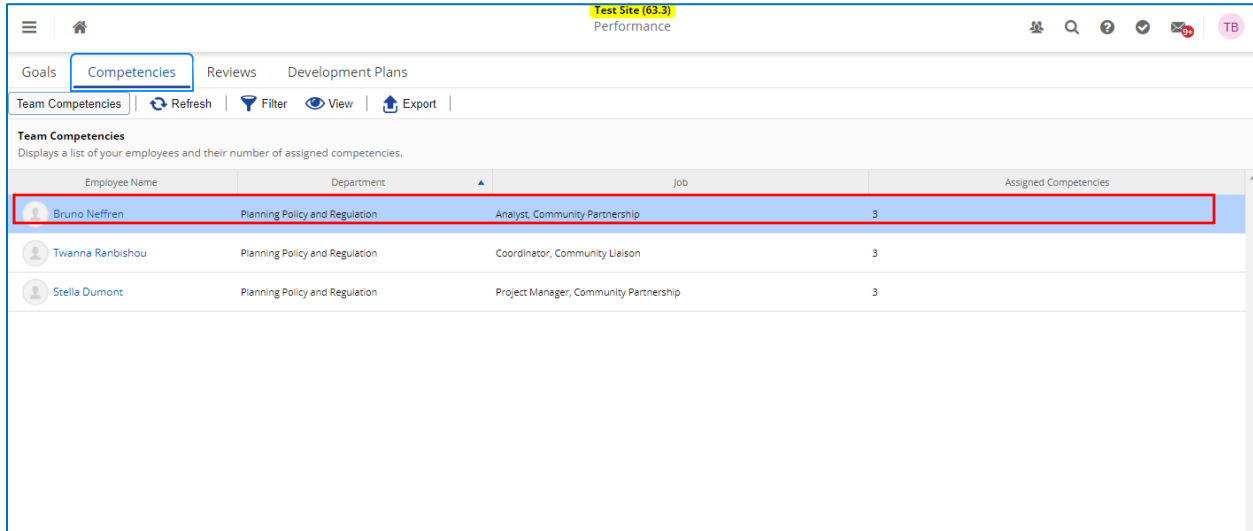


In this example, the user has a span of control of more than one level. They select the name of one of the managers under them - Lynden Rife. The direct report(s) under Lynden then results.



Competencies Screen

Click on the [Competencies](#) button to display the **Competencies** screen. By default, it displays a list of your employees that have competencies assigned to them.



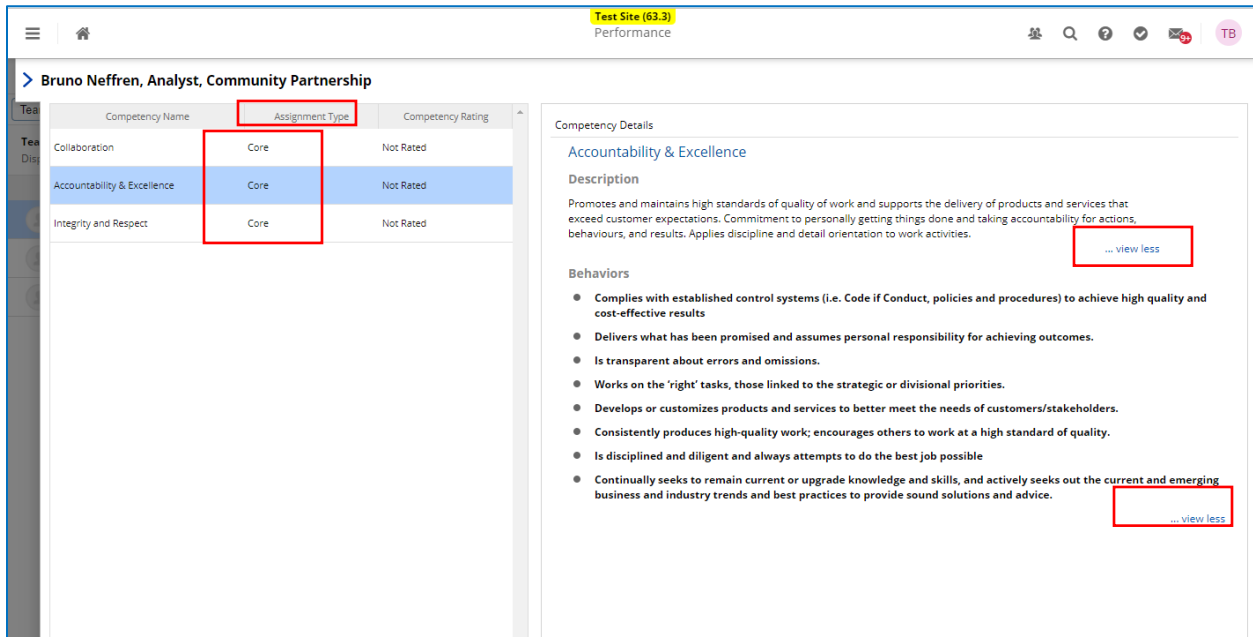
The screenshot shows the 'Competencies' screen with a table of employees and their assigned competencies. The table has four columns: Employee Name, Department, Job, and Assigned Competencies. Bruno Neffren is highlighted in the first row.

Employee Name	Department	Job	Assigned Competencies
Bruno Neffren	Planning Policy and Regulation	Analyst, Community Partnership	3
Twanna Ranbishou	Planning Policy and Regulation	Coordinator, Community Liaison	3
Stella Dumont	Planning Policy and Regulation	Project Manager, Community Partnership	3

Click on any of the employee names to view further details.

Another screen opens, as per below, and the specific competencies that are assigned to the employee you clicked are displayed.

Click on any of the assigned competencies to view related **Description** and **Core Behaviours**. Click “[..view more](#)” or “[...view less](#)” to expand and contract correspondingly.



The screenshot shows the 'Competency Details' screen for Bruno Neffren. It displays a table of competencies with columns for Competency Name, Assignment Type, and Competency Rating. The 'Accountability & Excellence' competency is highlighted. To the right, the details for this competency are shown, including a description and a list of behaviors. The 'view less' link is highlighted.

Competency Name	Assignment Type	Competency Rating
Collaboration	Core	Not Rated
Accountability & Excellence	Core	Not Rated
Integrity and Respect	Core	Not Rated

Competency Details
Accountability & Excellence
Description
 Promotes and maintains high standards of quality of work and supports the delivery of products and services that exceed customer expectations. Commitment to personally getting things done and taking accountability for actions, behaviours, and results. Applies discipline and detail orientation to work activities.
[... view less](#)

Behaviours

- Complies with established control systems (i.e. Code of Conduct, policies and procedures) to achieve high quality and cost-effective results
- Delivers what has been promised and assumes personal responsibility for achieving outcomes.
- Is transparent about errors and omissions.
- Works on the 'right' tasks, those linked to the strategic or divisional priorities.
- Develops or customizes products and services to better meet the needs of customers/stakeholders.
- Consistently produces high-quality work; encourages others to work at a high standard of quality.
- Is disciplined and diligent and always attempts to do the best job possible
- Continually seeks to remain current or upgrade knowledge and skills, and actively seeks out the current and emerging business and industry trends and best practices to provide sound solutions and advice.

[... view less](#)

Note the **Assignment Type**.

Competency Assignment Matrix

Competencies are assigned by **Competency Type**, as follows.

Competency Type	Assignment		
	All Employees	Managers	Senior Leadership
Core	✓		
Leadership	✓	✓	
Senior Leadership	✓	✓	✓

Development Plan Screen

Click on the [Development Plans](#) button to display the **Development Plans** screen. It displays development plans that your employees recorded on their **Development Plans** screen.

Development plans are separate from goals. Development plans are set up for various reasons, for example to track and manage career development or to improve performance.

The screenshot shows the TRCA Performance system interface. At the top, there's a navigation bar with tabs: Goals, Competencies, Reviews, and Development Plans (highlighted with a red box). Below the navigation bar, there are filters for 'Period' (Next Year), 'Team' (My Direct Reports), and 'Employee' (Select an Option...). The main content area displays a list of four development plans:

Employee	Plan Name	Period	Status	Progress
Bruno Neffren Analyst, Community Partnership	Development Plan 1	1/1/2023 - 12/31/2023	Not Started	0 %
Bruno Neffren Analyst, Community Partnership	Development Plan 2		Not Started	0 %
Stella Dumont Project Manager, Community Pa...	Development Plan 1	1/1/2023 - 12/31/2023	Not Started	0 %
Twanna Ranbishou Coordinator, Community Liaison	Development Plan 1	1/1/2023 - 12/31/2023	Not Started	0 %

TRCA Performance

You display more detailed information about each development plan that your employees are working on by clicking the arrow next to your employee's **Name** on the applicable development plan. A panel appears for each Development Plan.

The screenshot displays the 'Performance' section of the TRCA system, specifically the 'Development Plans' tab. The interface includes a top navigation bar with 'Goals', 'Competencies', 'Reviews', and 'Development Plans'. Below this, there are filters for 'Team Plans' and 'Draft Plans', and a dropdown menu for 'Period' set to 'Next Year'. The main content area lists development plans for three employees: Bruno Neffren, Stella Dumont, and Twanna Ranbishou. Each entry shows the employee's name, title, plan name, period, and progress status. Red boxes highlight the upward arrow icons next to Bruno Neffren's name in the first two entries, indicating that clicking these arrows expands the plan details.

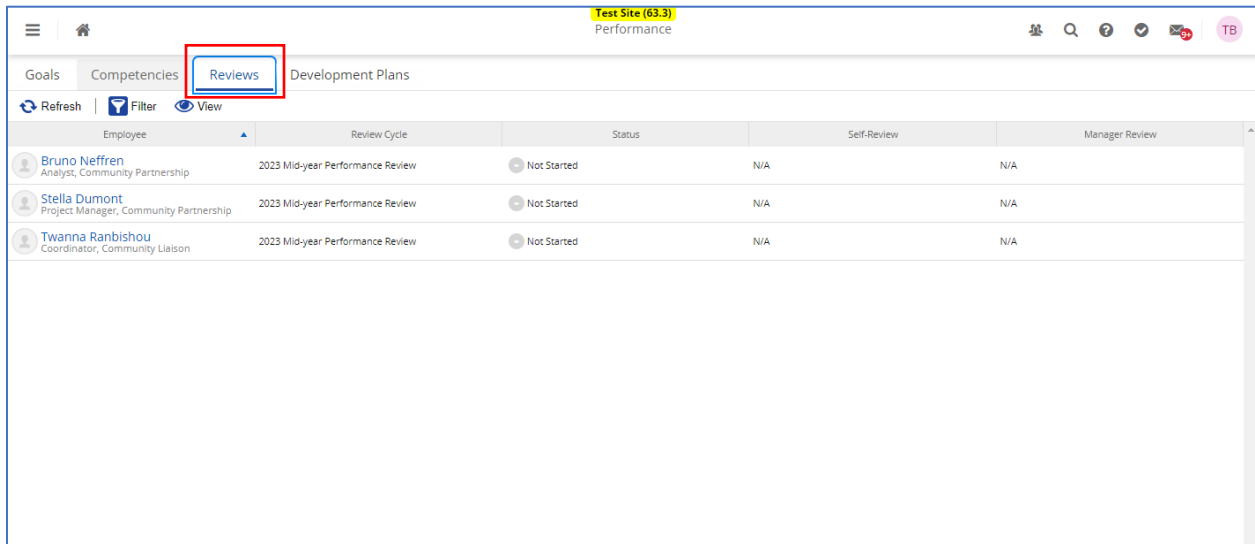
Employee	Plan Name	Period	Status
Bruno Neffren Analyst, Community Partnership	Development Plan 1	1/1/2023 - 12/31/2023	Not Started
Bruno Neffren Analyst, Community Partnership	Development Plan 2		Not Started
Stella Dumont Project Manager, Community Pa...	Development Plan 1	1/1/2023 - 12/31/2023	Not Started
Twanna Ranbishou Coordinator, Community Liaison	Development Plan 1	1/1/2023 - 12/31/2023	Not Started

Reviews Screen

Click on the [Reviews](#) button to display the **Reviews** screen. This screen lists performance review forms that are assigned to your employees.

You record performance comments and ratings for your employees' goals in these forms.

You also record comments for your employees' development plans in these forms.



Employee	Review Cycle	Status	Self-Review	Manager Review
Bruno Neffren Analyst, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A
Stella Dumont Project Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A
Twanna Ranbishou Coordinator, Community Liaison	2023 Mid-year Performance Review	Not Started	N/A	N/A

Reviews – Span of Control and Indirect Employees

If you are a higher level manager or director, the **Reviews** screen will include both your direct and indirect reports. But unlike the **Goals** screen, there is no 'Team' list to filter by managers beneath you. Instead, you use the [Filter](#) feature to filter your view.

Below is an example screen of a director that accesses the **Reviews** screen, one that is not filtered, and all employees under their span of control are listed.


TRCA Performance


You can see how such a lengthy list can be challenging to navigate.

Test Site (63.3)					
Performance					
Goals Competencies <u>Reviews</u> Development Plans					
Refresh Filter View					
Employee	Review Cycle	Status	Self-Review	Manager Review	
Yelena Durden Analyst, Urban Impact	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Yelena Durden Analyst, Urban Impact	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Yelena Durden Analyst, Urban Impact	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Twanna Ranbishou Coordinator, Community Liaison	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Twanna Ranbishou Coordinator, Community Liaison	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Twanna Ranbishou Coordinator, Community Liaison	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Tisa Beyer Senior Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Tisa Beyer Senior Manager, Community Partnership	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Tisa Beyer Senior Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Tierra Yount Senior Planner, Urban Enviro Impact	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Tierra Yount Senior Planner, Urban Enviro Impact	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Tierra Yount Senior Planner, Urban Enviro Impact	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Stella Dumont Project Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Stella Dumont Project Manager, Community Partnership	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Stella Dumont Project Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Stan Creighton Senior Manager, Environmental Stewardship	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Stan Creighton Senior Manager, Environmental Stewardship	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Stan Creighton Senior Manager, Environmental Stewardship	2023 Mid-year Performance Review	Not Started	N/A	N/A	

Applying a filter is the logical next step.

Reviews Filter

To filter your **Review** screen, click on the  button.

Test Site (63.3) Performance					
Goals Competencies Reviews Development Plans					
Refresh  View					
Employee	Review Cycle	Status	Self-Review	Manager Review	
Yelena Durden Analyst, Urban Impact	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Yelena Durden Analyst, Urban Impact	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Yelena Durden Analyst, Urban Impact	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Twanna Ranbishou Coordinator, Community Liaison	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Twanna Ranbishou Coordinator, Community Liaison	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Twanna Ranbishou Coordinator, Community Liaison	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Tisa Beyer Senior Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Tisa Beyer Senior Manager, Community Partnership	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Tisa Beyer Senior Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Tierra Yount Senior Planner, Urban Enviro Impact	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Tierra Yount Senior Planner, Urban Enviro Impact	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Tierra Yount Senior Planner, Urban Enviro Impact	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Stella Dumont Project Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Stella Dumont Project Manager, Community Partnership	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Stella Dumont Project Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A	
Stan Creighton Senior Manager, Environmental Stewardship	2022 Mid-year Performance Review	Self Review	N/A	N/A	
Stan Creighton Senior Manager, Environmental Stewardship	2022 Year End Performance Review	Self Review	Not Rated	Not Rated	
Stan Creighton Senior Manager, Environmental Stewardship	2023 Mid-year Performance Review	Not Started	N/A	N/A	

The **Reviews** screen alters to include a section for the filter.

Test Site (63.3)
Performance

Goals Competencies **Reviews** Development Plans


[Refresh](#) | [Filter](#) | [View](#)

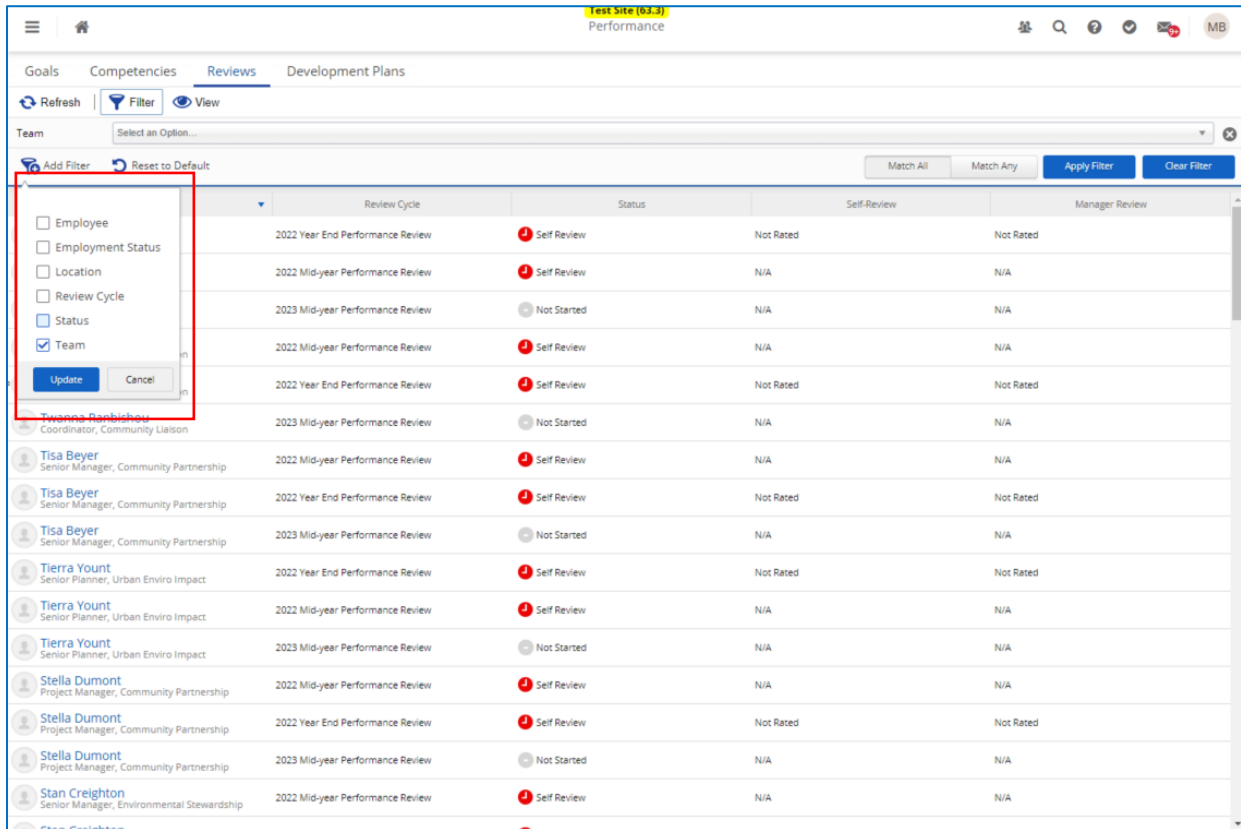
Team

[Add Filter](#) [Reset to Default](#) [Match All](#) [Match Any](#) [Apply Filter](#) [Clear Filter](#)

Employee	Review Cycle	Status	Self-Review	Manager Review
Yelena Durden Analyst, Urban Impact	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Yelena Durden Analyst, Urban Impact	2022 Mid-year Performance Review	Self Review	N/A	N/A
Yelena Durden Analyst, Urban Impact	2023 Mid-year Performance Review	Not Started	N/A	N/A
Twanna Ranbishou Coordinator, Community Liaison	2022 Mid-year Performance Review	Self Review	N/A	N/A
Twanna Ranbishou Coordinator, Community Liaison	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Twanna Ranbishou Coordinator, Community Liaison	2023 Mid-year Performance Review	Not Started	N/A	N/A
Tisa Beyer Senior Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A
Tisa Beyer Senior Manager, Community Partnership	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Tisa Beyer Senior Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A
Tierra Yount Senior Planner, Urban Enviro Impact	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Tierra Yount Senior Planner, Urban Enviro Impact	2022 Mid-year Performance Review	Self Review	N/A	N/A
Tierra Yount Senior Planner, Urban Enviro Impact	2023 Mid-year Performance Review	Not Started	N/A	N/A
Stella Dumont Project Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A
Stella Dumont Project Manager, Community Partnership	2022 Year End Performance Review	Self Review	Not Rated	Not Rated

TRCA Performance

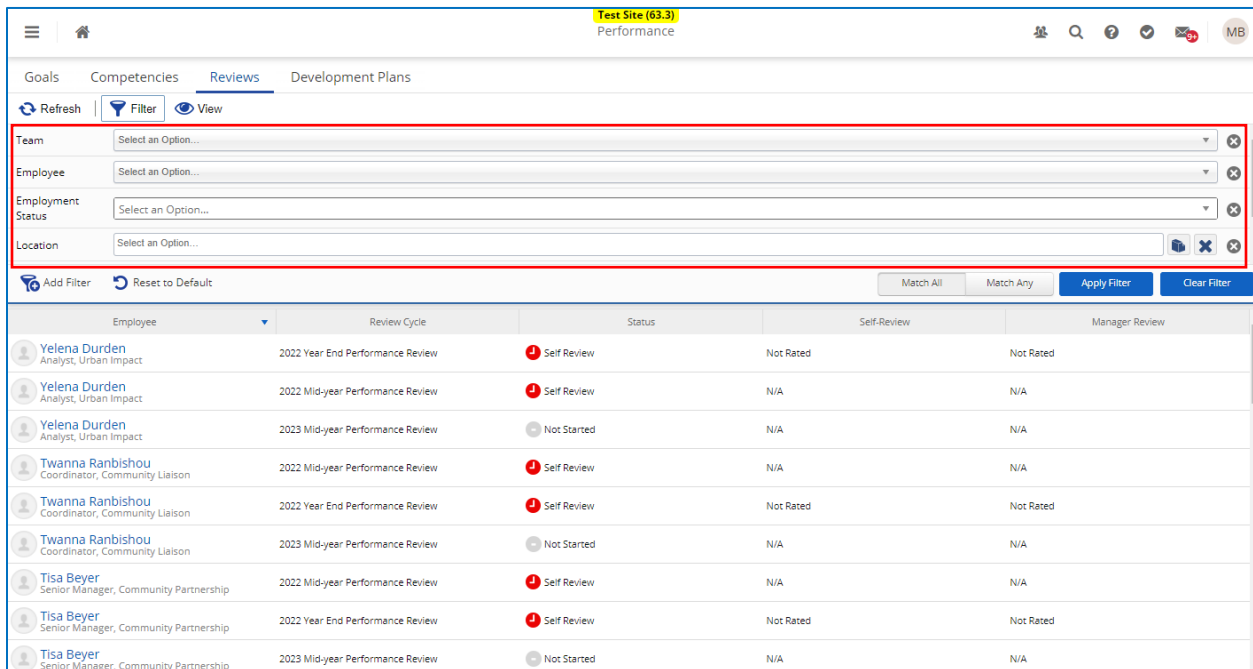
Click the  button to click and choose which fields you want included in the filter.



The screenshot shows the 'Performance' tab in the TRCA Performance system. The 'Add Filter' dropdown menu is open, showing a list of fields to filter by: Employee, Employment Status, Location, Review Cycle, Status, and Team. The 'Team' field is selected with a checkmark. Below the dropdown, the 'Update' button is visible. The main table displays performance reviews for various staff members, including Twanna Ranbishou, Tisa Beyer, and Tierra Yount.

Employee	Review Cycle	Status	Self-Review	Manager Review
Twanna Ranbishou	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Twanna Ranbishou	2022 Mid-year Performance Review	Self Review	N/A	N/A
Twanna Ranbishou	2023 Mid-year Performance Review	Not Started	N/A	N/A
Twanna Ranbishou	2022 Mid-year Performance Review	Self Review	N/A	N/A
Twanna Ranbishou	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Twanna Ranbishou	2023 Mid-year Performance Review	Not Started	N/A	N/A
Tisa Beyer	2022 Mid-year Performance Review	Self Review	N/A	N/A
Tisa Beyer	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Tisa Beyer	2023 Mid-year Performance Review	Not Started	N/A	N/A
Tierra Yount	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Tierra Yount	2022 Mid-year Performance Review	Self Review	N/A	N/A
Tierra Yount	2023 Mid-year Performance Review	Not Started	N/A	N/A
Stella Dumont	2022 Mid-year Performance Review	Self Review	N/A	N/A
Stella Dumont	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Stella Dumont	2023 Mid-year Performance Review	Not Started	N/A	N/A
Stan Creighton	2022 Mid-year Performance Review	Self Review	N/A	N/A

After you click 'Update', the filter section alters to include the chosen fields.



The screenshot shows the 'Performance' tab in the TRCA Performance system after the filter has been updated. The filter section now includes dropdown menus for Team, Employee, Employment Status, and Location. A red box highlights these filter fields. The main table displays performance reviews for various staff members, including Yelena Durden and Twanna Ranbishou.

Employee	Review Cycle	Status	Self-Review	Manager Review
Yelena Durden	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Yelena Durden	2022 Mid-year Performance Review	Self Review	N/A	N/A
Yelena Durden	2023 Mid-year Performance Review	Not Started	N/A	N/A
Twanna Ranbishou	2022 Mid-year Performance Review	Self Review	N/A	N/A
Twanna Ranbishou	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Twanna Ranbishou	2023 Mid-year Performance Review	Not Started	N/A	N/A
Tisa Beyer	2022 Mid-year Performance Review	Self Review	N/A	N/A
Tisa Beyer	2022 Year End Performance Review	Self Review	Not Rated	Not Rated
Tisa Beyer	2023 Mid-year Performance Review	Not Started	N/A	N/A

TRCA Performance

Use the scroll bar at the far right of the filter section to scroll down to view the other fields you chose.

Below, the filter is set to include:

- 'Team' = 'Tisa Beyer', and,
- 'Review Cycle' = '2023 Mid-year Performance Review'.

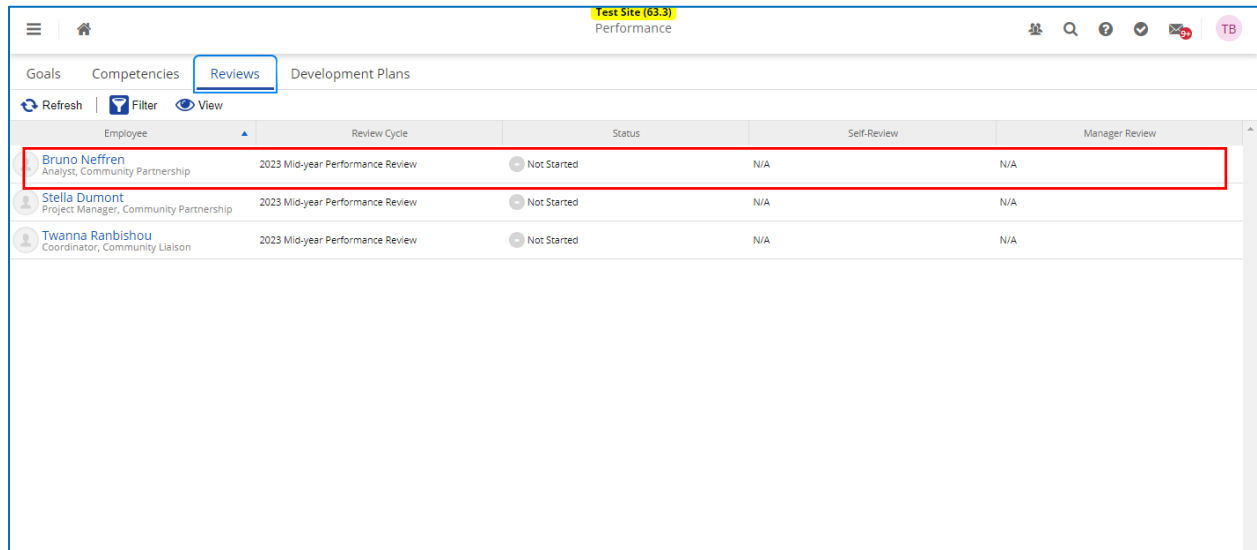
The screenshot shows the TRCA Performance system interface. At the top, there is a navigation bar with tabs for Goals, Competencies, Reviews, and Development Plans. The 'Reviews' tab is selected. Below the navigation bar, there is a filter section with a 'Filter' button and a 'View' button. The filter section contains several fields: 'Team' (set to 'Tisa Beyer'), 'Employee' (set to 'Select an Option...'), 'Employment Status' (set to 'Select an Option...'), and 'Review Cycle' (set to '2023 Mid-year Performance Review'). The 'Team' and 'Review Cycle' fields are highlighted with red boxes. To the right of the filter section, there is a vertical scroll bar, which is also highlighted with a red box. Below the filter section, there is a table with columns for Employee, Review Cycle, Status, Self-Review, and Manager Review. The table contains three rows of data:

Employee	Review Cycle	Status	Self-Review	Manager Review
Twanna Ranbishou Coordinator, Community Liaison	2023 Mid-year Performance Review	Not Started	N/A	N/A
Stella Dumont Project Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A
Bruno Neffren Analyst, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A

The **Reviews** screen is filtered accordingly.

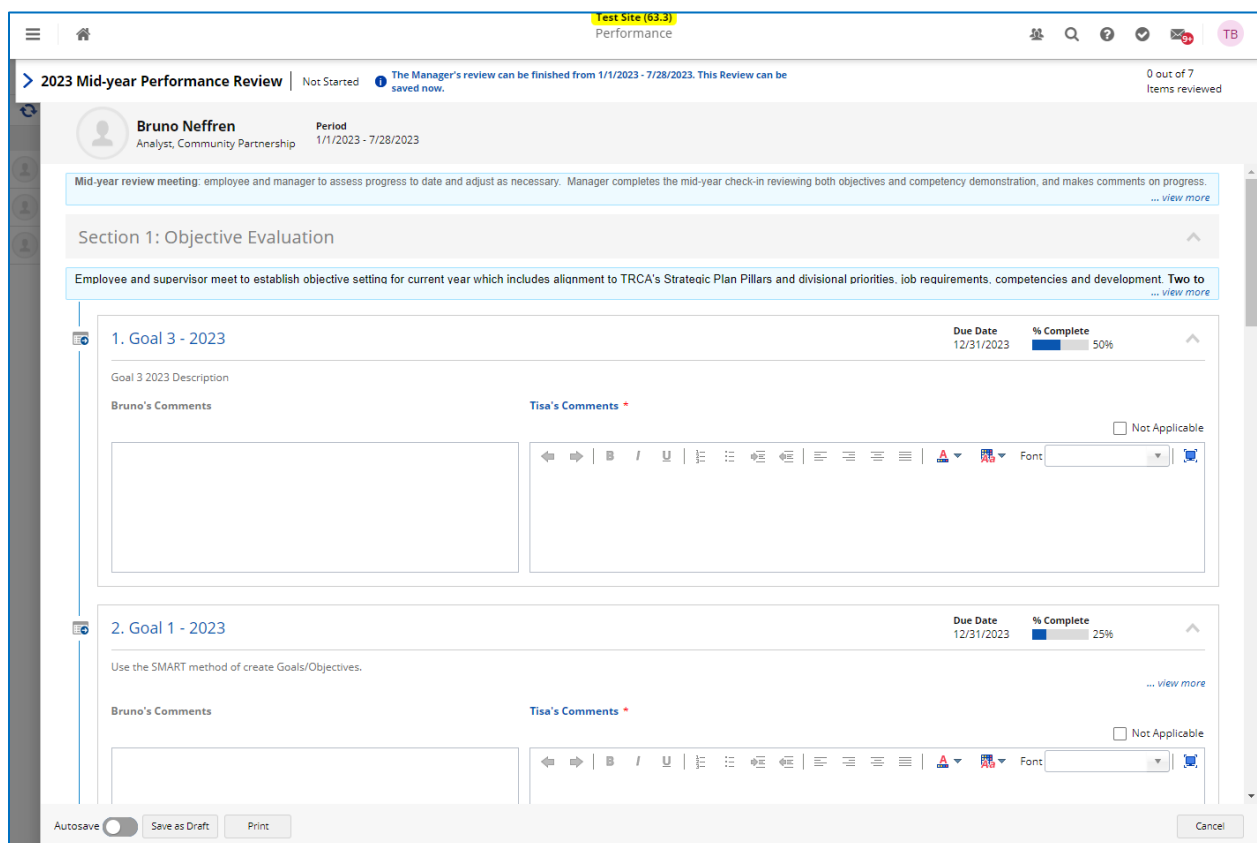
Reviews Screen: Review Form

Click on the row for the employee to open their review form.



Employee	Review Cycle	Status	Self-Review	Manager Review
Bruno Neffren Analyst, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A
Stella Dumont Project Manager, Community Partnership	2023 Mid-year Performance Review	Not Started	N/A	N/A
Twanna Ranbishou Coordinator, Community Liaison	2023 Mid-year Performance Review	Not Started	N/A	N/A

The screen alters and displays their review form.



2023 Mid-year Performance Review | Not Started | The Manager's review can be finished from 1/1/2023 - 7/28/2023. This Review can be saved now. | 0 out of 7 Items reviewed

Bruno Neffren
Analyst, Community Partnership | Period: 1/1/2023 - 7/28/2023

Mid-year review meeting: employee and manager to assess progress to date and adjust as necessary. Manager completes the mid-year check-in reviewing both objectives and competency demonstration, and makes comments on progress. [... view more](#)

Section 1: Objective Evaluation

Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development. [Two to ... view more](#)

1. Goal 3 - 2023 | Due Date: 12/31/2023 | % Complete: 50%

Goal 3 2023 Description

Bruno's Comments

Tisa's Comments

☐ Not Applicable

2. Goal 1 - 2023 | Due Date: 12/31/2023 | % Complete: 25%

Use the SMART method of create Goals/Objectives. [... view more](#)

Bruno's Comments

Tisa's Comments

☐ Not Applicable

Autosave ☐ Save as Draft Print Cancel

Review Form – Goals and Development Plans

Review forms are defined for a period (i.e., Mid-year, Year-end) with a Start Date and Due Date. They are designed to include Goals and Development Plans that overlap the review period.

Test Site (63.3)

Performance

> 2023 Mid-year Performance Review | Not Started | The Manager's review can be finished from 1/1/2023 - 7/28/2023. This Review can be saved now. | 0 out of 7 Items reviewed

Bruno Neffren
Analyst, Community Partnership

Period: 1/1/2023 - 7/28/2023

Mid-year review meeting: employee and manager to assess progress to date and adjust as necessary. Manager completes the mid-year check-in reviewing both objectives and competency demonstration, and makes comments on progress. ... view more

Section 1: Objective Evaluation

Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development. Two to ... view more

1. Goal 3 - 2023

Due Date: 12/31/2023 | % Complete: 50%

Use the SMART method of create Goals/Objectives.

Bruno's Comments

Tisa's Comments

2. Goal 1 - 2023

Due Date: 12/31/2023 | % Complete: 25%

Use the SMART method of create Goals/Objectives.

Since the period for the goal overlaps the period for the review, the goal is included in the review.

(Your employee recorded the goal below.)

Add Goal

Add Goal - English (US)

Name *
Goal 3

Description
Goal 3 Description

Goal Category *
Pillar 3 - Community Prosperity

Start Date *
1/1/2023

Due Date *
12/31/2023

Measure Type *
Percentage

Language
Select the languages that you want this goal to be available in.
☒ English (US)
☐ Français (Canada)

Goal progression is defined as percentage complete, as updated by the individuals assigned to the goal.

Save as Draft | Finish | Cancel

2023 Mid-year Performance Review | Not Started | The Manager's review can be finished from 1/1/2023 - 7/28/2023. This Review can be saved now. | 0 out of 7 Items reviewed

Bruno Neffren
Analyst, Community Partnership

Period
1/1/2023 - 7/28/2023

Section 3 - Development Plan

Development goals are developed based on gaps and opportunities identified through the performance cycle, as well as in support of future career planning development. Supervisor and employee should work ... view more

1. Development Plan 1 | Due Date: 12/31/2023 | Activities: 0 / 1 | % Complete: 0%

Improve skills and competencies to plan for desired promotion to manager.

Bruno's Comments

Tisa's Comments

Autosave | Save as Draft | Print | Cancel

Similarly, since the period for the development plan overlaps the period for the review, the development plan is included in the review.

(Your employee recorded the development plan below.)

Edit Plan

Plan Details

Enter the details for the development plan, including the plan purpose and the period during which the plan will be active.

Employee *
Bruno Neffren

Name *
Development Plan 1

Description
Improve skills and competencies to plan for desired promotion to manager.

Purpose *
Improve specific skills / Comp...

Purpose Description

Start Date
1/1/2023

Due Date
12/31/2023

Next | Cancel

Performance Review Form Sections

The **Review Form** is where you enter comments and ratings for your employee's performance.

Your employee accesses their form under their login and records comments and ratings as well.

The form consists of up to four sections.

Goal Evaluation	Includes the goals your employee created in the Goals screen.
Competency Evaluation	Includes the competencies assigned to your employee in the Competency screen.
Career and Development Planning	Includes custom questions set by the Human Resources to collect supplementary information.
Development Goal Evaluation	Includes development goals your employee created in the Development Goals screen.

View More / View Less

When a **Review Form** is opened there are sections and sub-sections that can be expanded or collapsed by clicking on '[..view more](#)' or '[...view less](#)'.

The screenshot displays the '2023 Mid-year Performance Review' interface. At the top, it identifies the employee as Bruno Neffren, Analyst, Community Partnership, with a review period from 1/1/2023 to 7/28/2023. A status bar indicates 'Not Started' and provides a deadline for the manager's review. The form is divided into sections: 'Mid-year review meeting' (with a 'view more' link), 'Section 1: Objective Evaluation' (with a 'Two to view more' link), and 'Goal Evaluation' (showing '1. Goal 3 - 2023' and '2. Goal 1 - 2023'). Each goal section includes a description, a 'Due Date' (12/31/2023), a '% Complete' progress bar, and a 'Comments' section for both Bruno and Tisa. The bottom of the form features 'Autosave', 'Save as Draft', 'Print', and 'Cancel' buttons.

Below the banner for the **Goal Evaluation** section is expanded to display its contents.

2023 Mid-year Performance Review | Not Started | The Manager's review can be finished from 1/1/2023 - 7/28/2023. This Review can be saved now.

0 out of 7 items reviewed

Bruno Neffren
 Analyst, Community Partnership
 Period: 1/1/2023 - 7/28/2023

Mid-year review meeting: employee and manager to assess progress to date and adjust as necessary. Manager completes the mid-year check-in reviewing both objectives and competency demonstration, and makes comments on progress. ... view more

Section 1: Objective Evaluation

Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development. Two to three objectives should be aligned to TRCA's Strategic Plan Pillars and Strategic Outcomes and two to three objectives should be aligned to divisional/business unit priorities (maximum of five total objectives).

STRATEGIC PLAN PILLARS AND STRATEGIC OUTCOMES
1 - Environmental Protection and Hazard Management
Deliver provincially mandated service pertaining to flood and erosion hazard.
Leaders in greenspace conservation.
Maintain healthy and resilient watershed ecosystems in the face of a changing climate.
Balance development and growth to protect the natural environment ensuring safe sustainable development.
2 - Knowledge Economy
Research and development that drives innovation and climate-based solutions.
Collaboration to advance a green transition.
Advocacy and adaptability in the face of policy pressures.
Integrate environmental considerations and science into decision making.
3- Community Prosperity
Connect communities and nature to greenspace.
A culture of diversity, equity and inclusion contributing to community well-being.
Informed citizens are conservation champions.
Inspired communities take environmental action.
4 - Service Excellence
A strong and skilled workforce.
Provide and manage an efficient and adaptable organization.
Responsive relationships and a trusted brand with a reputation for excellence.
Transparent decision making and accountable results.

... view less


Autosave ☐ Save as Draft Print Cancel

TRCA Performance

Below, the description for a specific goal is expanded to display its contents, as the review form will display the Goal Name only by default when it loads.

> 2023 Mid-year Performance Review | Not Started | i The Manager's review can be finished from 1/1/2023 - 7/28/2023. This Review can be saved now.

0 out of 7
Items reviewed



Bruno Neffren
Analyst, Community Partnership

Period
1/1/2023 - 7/28/2023

2. Goal 1 - 2023

Due Date
12/31/2023

% Complete
 25%

Use the SMART method to create Goals/Objectives.
S - specific
M - measurable
A - attainable
R - relevant
T - time-based

[View Log](#)

Bruno's Comments **Tisa's Comments ***

3. Goal 2 - 2023

Due Date
12/31/2023

% Complete
 25%

Goal 2 2023 Description

Bruno's Comments **Tisa's Comments ***

Autosave ☐
Save as Draft
Print
Cancel

Mid-year Review Form

The **Mid-year Performance Evaluation Form** includes three sections.

Goal Evaluation	Includes the goals your employee created in the Goals screen.
Competency Evaluation	Includes the competencies assigned to your employee in the Competency screen.
Development Plans	Includes the development plans your employee created in their Development Plans screen

Goals Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how your employees are progressing with their goals. Ratings are not part of the Mid-year review form.

1. Click on the **Comments** field next to your employee's comments field and add your comments.
2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other goals.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the **Review Form**.

Competency Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how your employees are progressing with competencies.

The screenshot displays the TRCA Performance Review interface. At the top, the user is logged in as 'Twanna Ranbishou', Coordinator, Community Liaison. The review period is from 1/1/2022 to 7/29/2022, with a due date of 6/17/2022. The form is titled '2022 Mid-year Performance Review' and is in 'Self Review' mode. The '1. Collaboration' competency is selected, showing a list of behaviors. The 'Comments' section has two text areas: 'Employee comment' and 'Manager comment'. The 'Manager comment' area is highlighted with a red box. The 'Save as Draft' button is also highlighted with a red box. The '2. Accountability & Excellence' competency is visible below.

To record your comments in the form:

1. Click on the **Comments** field next to your employee's comments field and add your comments
2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other competencies.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the **Review Form**.

Development Plans Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how your employees are progressing with development plans.

The screenshot displays the '2022 Mid-year Performance Review' form for Twanna Ranbishou. The form is titled 'Self Review' and shows '7 out of 7 Items reviewed'. The employee's name is Twanna Ranbishou, Coordinator, Community Liaison. The period is 1/1/2022 - 7/29/2022, and the due date is 6/17/2022. The form includes a section for 'Development Plan' with a description: 'Development goals are developed based on gaps and opportunities identified through the performance cycle, as well as in support of future career planning development. Supervisor and employee should work...'. Below this, there is a table with one row for '1. Development Plan 1', showing a due date of 12/31/2022 and 0% completion. The form also includes fields for 'Employee comment' and 'Manager comment' (labeled 'Tisa's Comments'). A red box highlights the 'Manager comment' field, and another red box highlights the 'Save as Draft' button at the bottom left. A scroll bar is visible on the right side of the form.

To record your comments in the form:

1. Click on the **Comments** field next to your employee's comments field and add your comments
2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other development plans.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the **Review Form**.

Mid-year Review – Form Routing Process

There is no approval with the **Mid-year** review form. The form is routed to statuses as follows:

Mid-year Performance Review	<ol style="list-style-type: none"> 1. Self Review 2. Manager Review 3. Employee Signature 4. Manager Signature
------------------------------------	--

Visibility

You can always view your employee's comments, under any status.

Your employee only sees your comments when the form reaches 'Employee Signature' status.

Reopen

If your employee submitted their review it becomes locked for them, but you have the option to **Reopen** your employee's review form which means you are giving your employee the opportunity to make changes to the comments they recorded. They then submit it all over again.

To reopen the view, click the **Reopen** button.

The screenshot displays the '2022 Mid-year Performance Review' form for Twanna Ranbishou, Coordinator, Community Liaison. The form is currently in the 'Manager Review' status, as indicated by the red box around the status tab. The form includes sections for 'Section 1: Objective Evaluation' and 'Section 2: Goal 2'. Each section contains a 'Goal Description', 'Employee comment' field, and 'Manager comment' field. The 'Reopen' button is highlighted in the bottom right corner of the form.

After clicking **Reopen**, the review status will revert to 'Self Review'.

Preview/Submit

When you are completed making updates to your employee's review form, you then **Submit** it.

When you are ready to submit, click the **Preview** button at the bottom of the form.

Test Site (63.3)

Performance

2022 Mid-year Performance Review | Manager Review

7 out of 7 Items reviewed

Twanna Ranbishou
Coordinator, Community Liaison

Period: 1/1/2022 - 7/29/2022
Due Date: 7/29/2022

Mid-year review meeting: employee and manager to assess progress to date and adjust as necessary. Manager completes the mid-year check-in reviewing both objectives and competency demonstration, and makes comments on progress. The [view more](#)

Section 1: Objective Evaluation

Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development. [Two to view more](#)

1. Goal 1 Due Date: 12/31/2022 % Complete: 0%

Goal 1 Description

Twanna's Comments

Employee comment.

Tisa's Comments *

Manager comment.

☐ Not Applicable

2. Goal 2 Due Date: 12/31/2022 % Complete: 0%

Goal 2 Description

Twanna's Comments

Employee comment.

Tisa's Comments *

Manager comment.

☐ Not Applicable

Autosave ☐ Save as Draft Print Reopen **Preview** Cancel

TRCA Performance

The **Preview** screen displays the review form in a different layout, but it consists of everything just as you and your employee recorded. Click the **Submit** button.

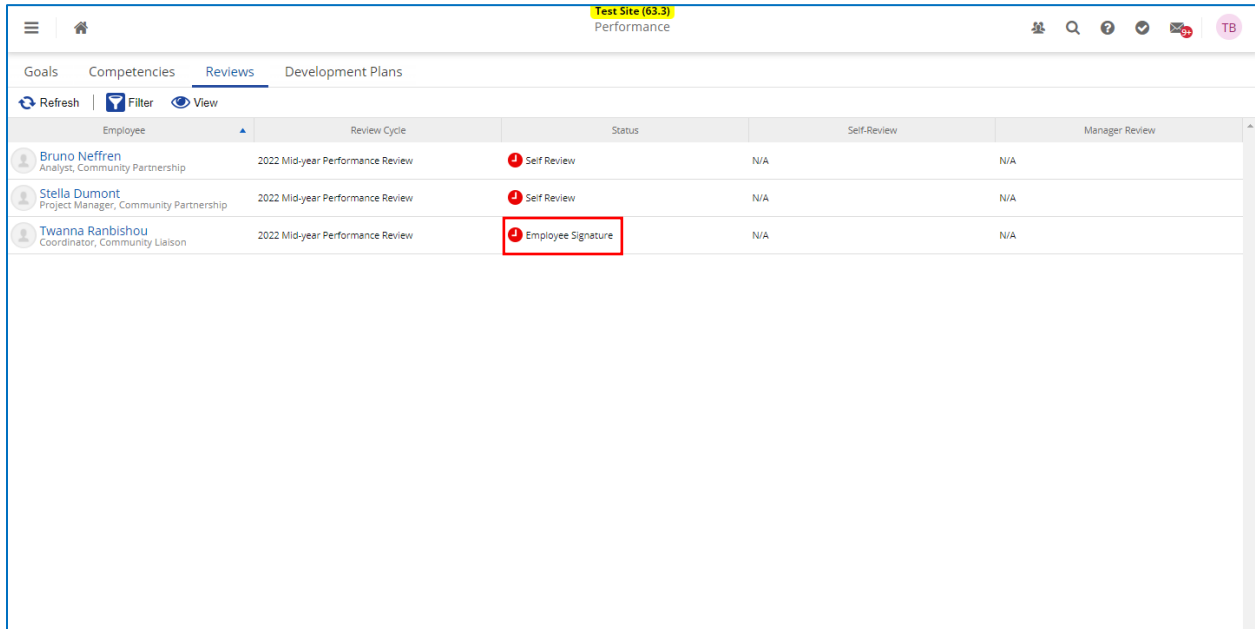
The screenshot shows the 'Preview' screen for a '2022 Mid-year Performance Review'. The header includes a navigation menu on the left, a title bar with 'Test Site (63.3)' and 'Performance', and a top right area with user icons and '7 out of 7 Items reviewed'. The main content area is titled 'Preview' and shows the review period '1/1/2022 - 7/29/2022' and the due date '6/17/2022'. It also displays 'Tisa Beyer's Avg. Rating' as 'N/A'. The review form is divided into two sections: 'Section 1: Objective Evaluation' and 'Section 2: Competency Evaluation'. Each section contains three goals with corresponding comments from 'Twanna's Comments' (Employee comment) and 'Tisa's Comments' (Manager comment). At the bottom right, there is a 'Submit' button highlighted with a red box, and a 'Cancel' button next to it.

A pop-up box with a message asking you to confirm submission will appear. Click 'OK'.

This screenshot shows the same 'Preview' screen as the previous one, but with a 'Please Confirm' pop-up box in the center. The pop-up box contains the text: 'You are about to submit the review after which it cannot be changed. Do you want to Continue?'. There are 'OK' and 'Cancel' buttons at the bottom of the pop-up, with the 'OK' button highlighted by a red box. The background of the review form is dimmed.

TRCA Performance

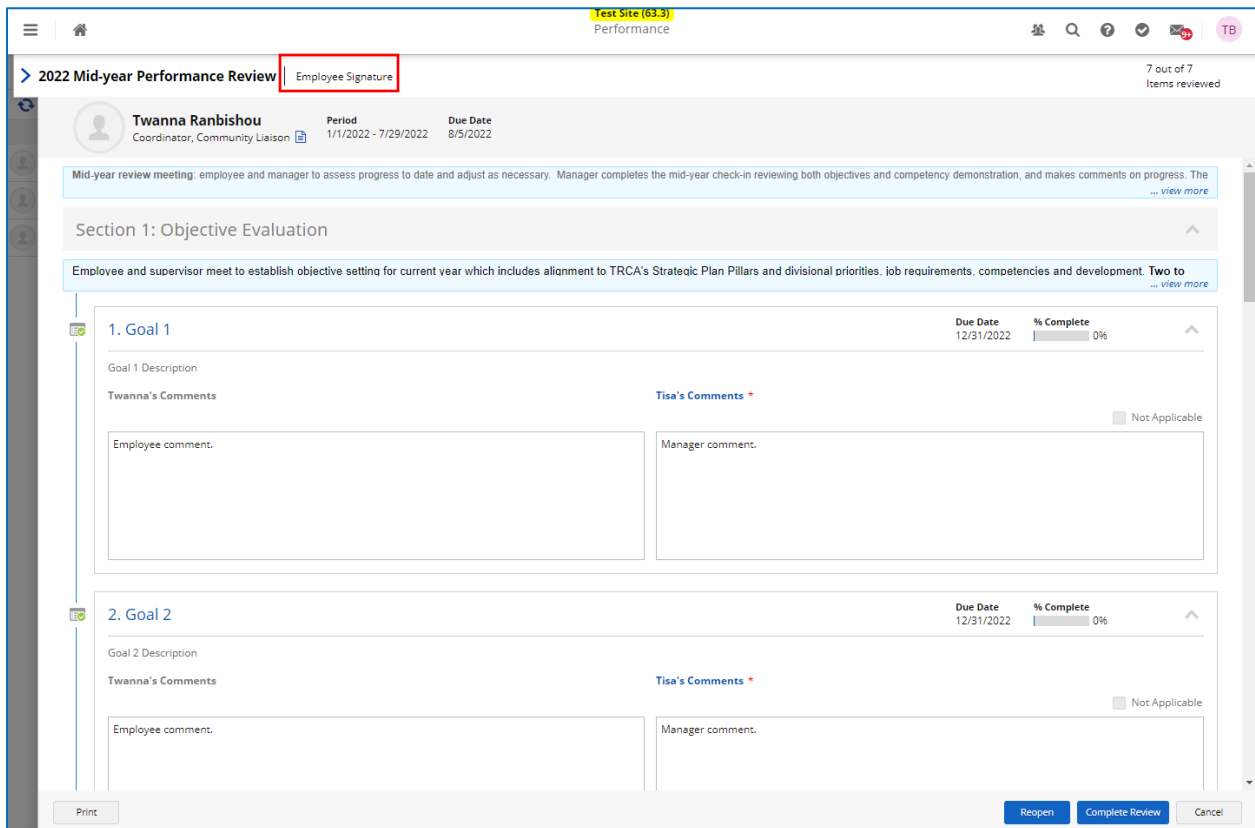
The **Reviews** screen will display after you submit a review form – it lists all your employees and their review forms. The subject employee's Review Status now shows 'Employee Signature'.



The screenshot shows the 'Reviews' tab in the TRCA Performance system. The table lists three employees: Bruno Neffren, Stella Dumont, and Twanna Ranbishou. The 'Status' column for Twanna Ranbishou is highlighted with a red box and shows 'Employee Signature'.

Employee	Review Cycle	Status	Self-Review	Manager Review
Bruno Neffren Analyst, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A
Stella Dumont Project Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A
Twanna Ranbishou Coordinator, Community Liaison	2022 Mid-year Performance Review	Employee Signature	N/A	N/A

If you click to open the form, it will again show Review Status equal to 'Employee Signature'. The form is locked, and you cannot record any more updates.



The screenshot shows the '2022 Mid-year Performance Review' form for Twanna Ranbishou. The 'Status' is 'Employee Signature'. The form is locked, and the 'Review Status' is 'Employee Signature'. The form contains sections for 'Section 1: Objective Evaluation' and 'Section 2: Goal 2'. The 'Due Date' is 12/31/2022, and the '% Complete' is 0%.

2022 Mid-year Performance Review | Employee Signature

7 out of 7 Items reviewed

Twanna Ranbishou
Coordinator, Community Liaison

Period: 1/1/2022 - 7/29/2022 Due Date: 8/5/2022

Mid-year review meeting: employee and manager to assess progress to date and adjust as necessary. Manager completes the mid-year check-in reviewing both objectives and competency demonstration, and makes comments on progress. The ... view more

Section 1: Objective Evaluation

Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development. Two to ... view more

1. Goal 1

Due Date: 12/31/2022 % Complete: 0%

Goal 1 Description

Twanna's Comments

Tisa's Comments *

Employee comment.

Manager comment.

2. Goal 2

Due Date: 12/31/2022 % Complete: 0%

Goal 2 Description

Twanna's Comments

Tisa's Comments *

Employee comment.

Manager comment.

Print Reopen Complete Review Cancel

Employee Signature

It is in this status that your employee will be able to view your comments.

Your employee is required 'sign-off' and complete the Employee Signature step. They check a checkbox signifying that they accept, they record a comment, and then submit.

After this, the review form status updates to 'Manager Signature'.

Manager Signature

You are now required to 'sign-off'.

1. Access and display the review form. Scroll down to the bottom.
2. Check the '**I Agree**' box.
3. Enter any **Comments**.
4. Click **Complete Review**.

Test Site (63.3)
Performance

> 2022 Mid-year Performance Review | Manager Signature 7 out of 7 Items reviewed

Twanna Ranbishou
Coordinator, Community Liaison

Period: 1/1/2022 - 7/29/2022 Due Date: 8/12/2022

1. Development Plan 1 Due Date: 12/31/2022 % Complete: 0%

Development Plan 1 description

Twanna's Comments

Employee comment.

Tisa's Comments +

Manager comment.

Not Applicable

Signature

Twanna Ranbishou's Signature

☒ I agree. 12/20/2022

Comments

Employee comment

Manager's Signature

☐ I agree.

Comments

Complete Review Cancel

TRCA Performance

A pop-up box with a message asking you to confirm submission will appear. Click OK.

Test Site (63.3)
Performance

2022 Mid-year Performance Review | Manager Signature

7 out of 7
Items reviewed

Twanna Ranbishou
Coordinator, Community Liaison

Period: 1/1/2022 - 7/29/2022
Due Date: 8/12/2022

1. Development Plan 1

Due Date: 12/31/2022
% Complete: 0%

Development Plan 1 description

Twanna's Comments

Tisa's Comments *

Employee comment.

Manager comment.

Signature

Twanna Ranbishou's Signature
☒ I agree.
12/20/2022

Manager's Signature
☒ I agree.

Comments

Employee comment

Manager comment

Print

Complete Review

Cancel

The **Reviews** screen will display after you submit for Manager Signature – it lists all your employees and their associated review forms. The subject employee's Review Status now shows 'Completed'.

Test Site (63.3)
Performance

Goals Competencies **Reviews** Development Plans

Refresh Filter View

Employee	Review Cycle	Status	Self-Review	Manager Review
Bruno Neffren Analyst, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A
Stella Dumont Project Manager, Community Partnership	2022 Mid-year Performance Review	Self Review	N/A	N/A
Twanna Ranbishou Coordinator, Community Liaison	2022 Mid-year Performance Review	Completed	N/A	N/A

Year-end Review Form

The **Year-end Review Form** includes four sections.

Goal Evaluation	Includes the goals created in the Goals screen.
Competency Evaluation	Includes the competencies assigned to you in the Competency screen.
Career and Development Planning	Includes custom questions set by Human Resources to collect supplementary information.
Development Goal Evaluation	Includes development goals you created in the Development Plans screen.

Performance Evaluation Rating Matrix

The header for the review form contains the **Evaluation Rating Matrix**. Click '[..view more](#)'. if this header collapsed.

You refer to this to help gauge the ratings you record for your performance.

Test Site (63.3)
Performance

2022 Year End Performance Review | Self Review

4 out of 10
Items reviewed

Emp Stat
Loca
Stat
Revi

Twanna Ranbishou
Coordinator, Community Liaison

Period
1/1/2022 - 12/31/2022

Due Date
11/4/2022

Twanna Ranbishou's Avg. Rating
Not Rated

Tisa Beyer's Avg. Rating
Not Rated

Year-end Appraisal to discuss results and evaluate performance. It should be a re-cap of the supervisor feedback and coaching which takes place throughout the year. The employee completes a self-assessment first and then a discussion takes place with the supervisor. Development opportunities are identified and connected to performance gaps, performance enhancements, skill development or key aspects of the employee's role.

Performance Evaluation Rating			
Does Not Meet Expectations (DNME)	Partially Meets Expectations or Developing Towards Expectations (PME)	Consistently Meets Expectations (ME)	Continually and Consistently Performs Above Expectations (AE)
<p>Expected behaviours are seldomly demonstrated;</p> <p>SMART objectives were not set or were not met;</p> <p>Fails to meet the criteria of the job;</p> <p>Falls short of performance targets;</p> <p>Provides inadequate support for the mission, vision or strategic objectives of the organization;</p> <p>Performs below the beginner or developmental stage of demonstrable knowledge, skills and abilities;</p> <p>Exhibits deficient work and competencies.</p>	<p>Developmental opportunity to consistently demonstrate desired behaviours;</p> <p>Delivers on some but not all established SMART objectives;</p> <p>Requires improvement to fully meet performance targets;</p> <p>Provides basic support to the mission, vision or strategic objectives of the organization;</p> <p>Developmental stage of demonstrable knowledge, skills and abilities;</p> <p>Exhibits some but not all competencies and work;</p> <p>Requires guidance and training to improve performance.</p>	<p>Expected behaviours demonstrated consistently;</p> <p>Consistently meets established SMART objectives;</p> <p>Achieves results at a level that meets performance targets;</p> <p>Demonstrates commendable support to the mission, vision or strategic objectives of the organization;</p> <p>Demonstrates fully proficient knowledge, skills and abilities, required work, and competencies.</p>	<p>Mastered behaviours, viewed as a role model;</p> <p>Exceeds in delivering on the established SMART objectives;</p> <p>Sustains consistent exemplary performance throughout the review period;</p> <p>Provides excellent service in support of the mission, vision or strategic objectives of the organization;</p> <p>Consistently exceeds and sometimes far exceeding the criteria of the job;</p> <p>Consistently demonstrates initiative for the benefit of the organization, their division and business unit;</p> <p>Demonstrates full mastery of knowledge, skills and abilities, required work and competencies.</p>

Autosave ☐ Save as Draft Print Preview Cancel

Goals Evaluation

As part of the **Year-end** review form, in addition to comments, you are required to provide ratings on how your employees are progressing with their goals.

The screenshot displays the '2022 Year End Performance Review | Self Review' form. At the top, it shows the user's name 'Twanna Ranbushou' and the period '1/1/2022 - 12/31/2022'. The form is divided into sections for 'Section 1 - Objective Evaluation' and 'Section 2 - Subjective Evaluation'. Each section contains goal descriptions, rating scales for 'Twanna's Rating' and 'Tisa's Rating', and comment fields for 'Employee comment' and 'Manager comment'. The 'Tisa's Rating' field is highlighted with a red box. The 'Comments' field is also highlighted with a red box. The bottom of the form has buttons for 'Autosave', 'Save as Draft', 'Print', 'Preview', and 'Cancel'.

To record your comments and ratings in the form:

1. Click on the **Comments** field next to your employee's comments field and add your comments.
2. Record a **Rating** for performance by clicking / dragging the slider on the scale.
3. Use the scroll bar to navigate to other **Comment** fields and **Rating** scales to update same information for other goals.
4. To save, click **Save as Draft**.
5. Click arrow at top left corner of screen to exit the review form.

Competency Evaluation

As part of the **Year-end** review form, in addition to comments, you are required to provide ratings on how your employees are progressing with their competencies.

Test Site (63.3)

Performance

> 2022 Year End Performance Review | Self Review

4 out of 10 Items reviewed

Twanna Ranbishou
Coordinator, Community Liaison

Period 1/1/2022 - 12/31/2022 Due Date 11/4/2022

Twanna Ranbishou's Avg. Rating Not Rated Tisa Beyer's Avg. Rating Not Rated

Section 2 - Competency Evaluation

Twanna's Avg. Rating Not Rated Tisa's Avg. Rating Not Rated

This section is used to evaluate demonstration of TRCA's required competencies. ... view more

1. Collaboration

Effectively works with others across the organization and external to the organization toward a common goal. Works with the organizations best interest at the core. Builds and maintains broad cooperative work relationships. ... view more

Behaviors

- Builds and maintains cooperative work relationships with others.
- Openly shares relevant and important information with appropriate individuals to assist in achievement of common goals.
- Li ... view more

Twanna's Rating

Tisa's Rating * Not Rated

Comments *

Employee comment.

Manager comment.

2. Accountability & Excellence

Promotes and maintains high standards of quality of work and supports the delivery of products and services that exceed customer expectations. Commitment to personally getting things done and taking accountability for ... view more

Behaviors

- Complies with established control systems (i.e. Code of Conduct, policies and procedures) to achieve high quality and cost-effective results
- Delivers what has been promised and assumes personal responsibility

Autosave Save as Draft Print Preview Cancel

To record your comments and ratings in the form:

1. Click on the **Comments** field next to your employee's comments field and add your comments.
2. Record a **Rating** for performance by clicking / dragging the slider on the scale.
3. Use the scroll bar to navigate to other **Comment** fields and **Rating** to update same information for other competencies.
4. To save, click **Save as Draft**.
5. Click arrow at top left corner of screen to exit the review form.

Career and Development Planning

As part of the Performance Review cycle for **Year-end** you are required to provide feedback on comments recorded by your employees for **Career and Development Planning - Additional Questions**.

The questions are text based. Record your comments.

The screenshot shows the '2022 Year End Performance Review' form for Twanna Ranbishou. The form is titled 'Section 3 - Career and Development Planning'. It contains three questions, each with a 'Twanna's Answer' field (Employee comment) and a 'Tisa's Answer' field (Manager comment). The 'Tisa's Answer' fields are highlighted with red boxes. A red box also highlights the 'Save as Draft' button at the bottom left. A red box highlights the '2022 Year End Performance Review' link in the top left navigation bar. A red box highlights the scroll bar on the right side of the form.

To record your comments in the form:

1. Click on the **Comments** field next to your employee's comments field and add your comments.
2. Use the scroll bar to navigate to other **Comment** fields to update same information for other additional questions.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the **Review Form**.

Development Plan Evaluation

As part of the review cycle for **Year-end**, you are required to provide comments on how your employees are progressing with their development plans.

The screenshot displays the TRCA Performance Review System interface. The top navigation bar shows the user is logged in as 'TB'. The main header indicates the current review is for '2022 Year End Performance Review' (Self Review). The sidebar on the left contains navigation links, with the '2022 Year End Performance Review' link highlighted by a red box. The main content area shows the review details for Twanna Ranbushou, including her title (Coordinator, Community Liaison), the review period (1/1/2022 - 12/31/2022), and the due date (11/4/2022). The review form includes sections for 'Twanna's Answer' (Employee comment) and 'Tisa's Answer' (Manager comment). Below this is 'Section 4 - Development Plan', which contains a table for development plans. The first plan, '1. Development Plan 1', has a due date of 12/31/2022 and is 0% complete. The 'Tisa's Comments' field for this plan is highlighted by a red box. At the bottom of the form, there are buttons for 'Autosave', 'Save as Draft' (highlighted by a red box), 'Print', 'Preview', and 'Cancel'. A red box also highlights the 'Tisa's Comments' field in the development plan section.

To record your comments in the form:

1. Click on the **Comments** field next to your employee's comments field and add your comments.
2. Use the scroll bar to navigate to other **Comment** to enter additional information for other development plans.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the review form.

Year-end Review – Approval Process

The routing, status and related approval in the process are as follows:

Year End Performance Review	<ol style="list-style-type: none"> 1. Self Review 2. Manager Review 3. Human Resources Approval (Pending Approval) 4. Employee Signature 5. Manager Signature
------------------------------------	--

You take the same steps for approval of your employee's Performance Evaluation Review Form under **Year- end Performance Evaluation** as you do under **Mid-year Performance Evaluation**.

The only difference in the process is that **Pending Approval** (i.e., “Human Resources Approval”) is slotted in between **Manager Review** and **Employee Signature**.

Reopen

If your employee submitted their review, you have the option to **Reopen** your employee's review form which means you are giving your employee the opportunity to make changes to the comments they recorded. They then submit it all over again.

To reopen the view, click the **Reopen** button.

The screenshot shows the '2022 Year End Performance Review' interface. At the top, the 'Manager Review' tab is selected. The user profile for Twanna Ranbishou is displayed, along with the review period (1/1/2022 - 12/31/2022) and due date (12/9/2022). The interface is divided into sections for 'Section 1 - Objective Evaluation' and 'Section 2 - Goal 2'. Each section contains a goal description, a rating bar for Twanna's Rating, and a comments section for both Employee and Manager. The 'Reopen' button is highlighted in a red box at the bottom right of the interface.