



**Teachers College**  
COLUMBIA UNIVERSITY

# Intro to ACE Performance Management

Achieve Your Goals

Contribute to TC's Success

Excel in Your Profession

# What We'll Cover Today

- ACE Cycle
- ACE Stages
- How to Access
- Navigating the System
- Detailed Walk Through the System at Each Stage
  - Stage 1: Initial Goal Planning
  - Stage 2: Mid-Year Progress Review
  - Stage 3: Year-End Assessment
- Other Items
  - Cascading Goals as a Manager
  - Accepting New Reviews as a Manager
  - Printing Completed Reviews





# ACE Cycle

# ACE Cycle

# ACE

★ ACHIEVE | CONTRIBUTE | EXCEL ★



### Goal Setting

Translates organizational goals to your individual goals to help connect how your actions, roles, and responsibilities drive the larger organizational strategy.



### Mid-Year Assessment

Helps both the employee and the manager identify where performance is excelling and where there is room for opportunity.



### Year-End Assessment

This stage involves finalizing the performance category, which assess how you've **Achieved** your goals, **Contributed** to team and organizational success, and **Excelled** in your role.



### Ongoing Feedback

Regular 1:1 conversations designed to support employees in reaching goals and provide meaningful insights into enhancing performance.



**Human Resources**  
Teachers College, Columbia University

TC ACE enables employees to **ACHIEVE** their career aspirations, **CONTRIBUTE** to the success of the College and **EXCEL** in their profession.



# ACE Stages

# ACE Stages





# How to Access

# Log into the Employee Portal

The screenshot displays the Employee Portal interface. At the top, it says "Hello Hannah!". Below this, there are navigation buttons: "Go to Employee Information", "TIME, LEAVE, & PAY", and "MY BENEFITS". The "Applications" section features icons for Gmail, Zoom, Google Drive, Banner Admin PROD, Google Calendar, Banner Admin PPRD, Banner Admin TEST1, and a "MORE APPLICATIONS" button. The "Resources" section is highlighted with a red box and contains four items: "EMPLOYEE RESOURCES: Electronic Personnel Action Forms (EPAF)", "EMPLOYEE RESOURCES: Employee Class & Account Chart", "EMPLOYEE RESOURCES: Human Resources Forms", and "EMPLOYEE RESOURCES: Human Resources Website". Below these items is a "Customize/Add to My Resources" button and an "ALL RESOURCES >" link with a red arrow pointing to it. The "Knowledge Articles" section includes categories like "PAYROLL: 2024 Payroll Schedule", "PURCHASING: Buying and Paying", "TECHNOLOGY: Learn to Identify a Phishing Email", and "PAYROLL: Payroll User Guides", along with a search bar and an "ALL ARTICLES >" link.

Log into the Employee Portal, head to the **Resource** section and click **All Resources**



# Click the Employee Resources button

The screenshot shows the 'EMPLOYEE PORTAL' interface. On the left is a 'My Resources' sidebar with a list of bookmarked resources. The main area is titled 'Resources' and contains a search bar, a row of category buttons, and a grid of resource cards. A red arrow points to the 'Employee Resources' button in the category row.

**EMPLOYEE PORTAL**

**My Resources**

**MY BOOKMARKED RESOURCES**

Your bookmarked resources are listed below. Click the icon to add or remove a resource to your list.

- POLICIES/COMPLIANCE**  
TC Policy Library
- EMPLOYEE RESOURCES**  
Employee Class & Account Chart
- EMPLOYEE RESOURCES**  
Electronic Personnel Action Forms (EPAF)
- EMPLOYEE RESOURCES**  
Human Resources Forms
- EMPLOYEE RESOURCES**  
Human Resources Website
- EMPLOYEE RESOURCES**  
Recruitment Dashboard
- EMPLOYEE RESOURCES**  
Performance Management

**Resources**

**ALL RESOURCES**

Resources available to support you in your work at Teachers College.

Search all resources...

Academics Campus **Employee Resources** Faculty Resources Jobs/Career Library Policies/Compliance

Publications Reports Research TC Resources Technology

- ACADEMICS**  
Academic Calendar
- ACADEMICS**  
Academic Catalog Editor
- TECHNOLOGY**  
Accessibility First - TC's Digital Accessibility Website
- TECHNOLOGY**  
Banner Testing
- EMPLOYEE RESOURCES**  
Budget & Planning Office Website
- EMPLOYEE RESOURCES**  
Compensation Statement
- EMPLOYEE RESOURCES**  
Conflict of Interest Disclosure
- CAMPUS**  
Contractor ID Request
- TC RESOURCES**  
Digital Futures Institute
- POLICIES/COMPLIANCE**  
Discrimination, Harassment, and Gender-Based Misconduct course

**EMPLOYEE RESOURCES** **TECHNOLOGY**

You will be taken to an **All Resource** page where you can find all resources available to you. Find and click the **Employee Resource** button.

# Click the ACE Performance Management link

The screenshot shows a web interface for 'Resources'. At the top is a blue header with the word 'Resources'. Below it, the section is titled 'ALL RESOURCES' with a subtitle 'Resources available to support you in your work at Teachers College.' A search bar is present with the placeholder text 'Search all resources...'. Below the search bar are two rows of category buttons: 'Academics', 'Campus', 'Employee Resources' (which is dark blue and selected), 'Faculty Resources', 'Jobs/Career', 'Library', 'Policies/Compliance' in the first row; and 'Publications', 'Reports', 'Research', 'TC Resources', 'Technology' in the second row. Below the buttons are four resource cards. The first card is titled 'EMPLOYEE RESOURCES' and contains the text 'ACE (Achieve, Contribute, Excel) - Performance Management'. A red arrow points to this card. The other three cards are also titled 'EMPLOYEE RESOURCES' and contain 'Budget & Planning Office Website', 'Compensation Statement', and 'Conflict of Interest Disclosure' respectively.

You will be presented with all the resources categorized as **Employee Resources**. From there, you can find and click the ACE (Achieve, Contribute, Excel) - **Performance Management** link.

\*If you wish, you can click the icon next to the title and save this to your bookmarks.



# Navigating the System

# ACE Performance Home Page

Your  
Performance  
Reviews

The screenshot shows the ACE Performance Home Page for user Hannah. The page is divided into several sections:

- Header:** Navigation menu with "About me", "My team", "My community", "Reports", and "Create". A "Journal entry" button and user profile "Hannah" are on the right.
- Welcome Message:** "Welcome Hannah, you are logged in".
- My Performance Reviews:** A green header section containing:
  - NEW Performance Review 2020 - 2021:** Current step: Employee Suggested Goals. This card is circled in red.
  - Performance Review 2019 - 2020:** Current step: End of Year Final Review - Supervisor.
- Recruitment:** A blue header section with a link to "Administration".
- Team Performance Reviews:** A green header section containing:
  - Action Required:** "There are 2 performance reviews not assigned to you. [Show me](#)".
  - Emma Employee:** A dropdown menu.
  - NEW Performance Review 2019 - 2020 (OVERDUE):** Current step: Supervisor Finalization of Goals. This card is circled in red.
- Right Sidebar:** Two blue header sections:
  - My Profile:** View Profile
  - Onboarding:** Onboarding

Annotations:

- Red arrows point from the text "Performance Review Name" to the title of the first review card.
- Red arrows point from the text "Current Step" to the "Current step" text below the first review card.

Your Team's  
Performance  
Reviews

# Home Screen – Employee View

The screenshot shows the 'Home Screen – Employee View' interface. At the top, there is a blue navigation bar with a home icon, 'About me' (highlighted with a red box), 'My community', a 'Journal entry' button, and a user profile for 'Emma'. Below the navigation bar, the 'My' section is visible, with a dropdown menu showing 'Journal' and 'Performance reviews' (indicated by a red arrow). The 'ews' logo is also present. Below the menu, there is a 'Status:' dropdown set to 'Current', a 'Clear' button, and a 'Search' button. The main content area displays a table of review processes:

Review process	Review step	Manager	Role	Start date	Due date		
Performance Review 2018 - 19	Employee Confirmation	Svetla Eneva	Professional staff	3 Dec 2018	23 Nov 2019	I want to...	<a href="#">Open review</a>

# Home Screen – Manager View

The image shows a user interface for a manager's home screen. At the top, a dark blue navigation bar contains several items: a home icon, 'About me', 'My team', 'My community', 'Reports', and 'Create'. The 'My team' item is highlighted with an orange box. A red arrow points from this box to a dropdown menu that is open, listing 'Organizational chart', 'Team details', 'Recruitment', and 'Performance reviews'. Another red arrow points from the 'Performance reviews' option to a specific 'Open review' link in the team details section below.

Below the navigation bar, the main content area is divided into sections. On the left, there is a 'Welcome Hand' section and a 'My Performance' section with a green header. The 'Performance reviews' section is currently active, showing 'Current step: Employee Suggested Goals'.

The 'My team' section is highlighted with a red border and contains two employee profiles:

- Sr. HRIS Analyst**  
Position: Sr. HRIS Analyst  
Incumbent: Johanna Masbad
- HRIS Analyst I**  
Employee: Ann Garg  
Performance: Journal Open review  
View profile View details Create requisition from a Job description

A 'Flags' dropdown menu is visible next to the 'HRIS Analyst I' profile. A red arrow points from the 'Open review' link in the performance section to the 'Open review' text in the 'HRIS Analyst I' profile.

# Home Screen – Manager View

**My team performance reviews**

The following employees report to you, however their reviews are not assigned to you:

- Ann Garg, Journal [Action review](#) [View report](#)
- Ann Garg, Employee Suggested Goals [Action review](#) [View report](#)

Please [refresh the page](#) to see performance reviews that you have just taken ownership.

Employee first name:  Employee last name:

Level:  Status:

Review process step:  Role:

Employee	Review process	Review step	Role	Start date	Due date	I want to...	Action
Emma Employee	Performance Review 2019 - 2020	Employee Confirmation	Professional staff	24 Sep 2019	13 Sep 2020	I want to...	<input type="button" value="Open review"/>
Emma Employee	Performance Review 2019 - 2020	Employee Confirmation	Professional staff	14 Oct 2019	14 Oct 2020	I want to...	<input type="button" value="Open review"/>

# Umbrella View for all Direct Reports

Navigation: About me ▾ **My team ▾** My community ▾ Reports + Create

Dropdown menu options:  
Organizational chart  
Team details  
Recruitment  
Performance reviews

Employee profile sidebar:  
Employee: [Redacted]  
Performance: Mid Year Check in [Open review](#)  
[View profile](#) [View details](#) [Create requisition from a Job description](#)

**My team**

**You** **Your direct report**

Director - HRIS (Markus Olfend) > HRIS Manager (Redacted)

HRIS Manager  
Position: HRIS Manager  
Incumbent: [Redacted]

**HRIS Analyst 1** **Your direct report's team** [Flags ▾](#)  
Employee: [Redacted]  
Performance: Mid Year Check in [View report](#)  
[View profile](#) [View details](#) [Create requisition from a Job description](#)

**HRIS Coordinator** **Your direct report's team** [Flags ▾](#)  
Employee: [Redacted]  
Performance: Mid Year Check in [View report](#)  
[View profile](#) [View details](#) [Create requisition from a Job description](#)

**Click to view their performance review**



# ACE Process Home Page - Start Tab

## Emma Employee - Performance Review 2024 - 2025

Start | Goal Planning | Mid Year | Year End Assessment | Next steps

The **BOLD** font indicates you are in that tab

The name of the stage you are in will be displayed here

This text will describe what you should be doing during this stage

You are in the **Initial Goal Setting Stage**

This year, you have the opportunity to take control of your professional development through our simplified performance management process. It's up to you to establish clear, achievable goals that are in line with your personal growth and TC's strategic priorities. By actively participating in this process, you will assess your progress, have valuable discussions with your manager, and adjust your goals to ensure that you are contributing to TC's mission and strategic direction. Performance management is not just a yearly task—it is your means to achieve growth, make an impact, and succeed at TC.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit your goals to your manager for review and approval.

Tip: Initiate a goal planning discussion with your manager.

Next →

# Navigating through Tabs

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > Mid Year > Year End Assessment > Next steps

Last saved: Oct 21, 2024, 1:43pm Actions ▾

You are in the **Initial Goal Setting** Stage

This year, you have the opportunity to take control of your professional development through our simplified performance management process. It's up to you to establish clear,

- You will address each of these tabs at different stages during the review.
- They will always be displayed to you.
- To navigate between tabs, simply click on each one.

# Other Tabs Screen

Home About me ▾ My team ▾ My community ▾ Journal entry Emma ▾ i

Emma Employee - Performance 25

Start **Goal Planning** Mid Year Next steps

**BOLD font indicates you are in that tab**

**Each tab's top section provides help text to guide your actions**

**The tab name will also be displayed at the top of the section**

Goal Planning Saved Actions ▾

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the objectives of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit your goals to your manager for review and approval. Tip: Initiate a goal planning discussion with your manager.

**Manager's Responsibility:** Meet with your employee to ensure that their goals align with both the team and department objectives. Work to identify how their goals might offer opportunities for professional development.

SPECIFIC MEASURABLE ACHIEVABLE RELEVANT TIME-BOUND EVALUATED REVISED

# Stage 1: Initial Goal Planning

Initial Goal  
Planning

Mid-Year  
Progress  
Review

Year-End  
Assessment

# Goal Planning Tab

The screenshot shows a user interface for a performance review. At the top, there is a navigation bar with a home icon, 'About me', 'My team', and 'My community'. On the right, there is a 'Journal entry' button, a user profile for 'Emma', and an information icon. Below the navigation bar, the title 'Emma Employee - Performance Review 2024 - 2025' is displayed. A progress bar contains five steps: 'Start', 'Goal Planning', 'Mid Year', 'Year End Assessment', and 'Next steps'. The 'Goal Planning' step is circled in red. Below the progress bar, the 'Goal Planning' section is active. It features a red callout box with the text 'Each tab's top section has help text to guide your actions' and an arrow pointing to a red-bordered box containing help text. The help text reads: 'In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College. **Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit your goals to your manager for review and approval. Tip: Initiate a goal planning discussion with your manager.' To the right of the help text, there is a 'Saved' status and an 'Actions' dropdown menu.

- In this tab, you will document your SMARTER goals for the year

# Adding New Goals

Item title 🗑️

Title\*  **← Input Goal Name here**

Description

**B I U** | | | | | | | | | Source

**Provide a detailed description of the goal in this text box**

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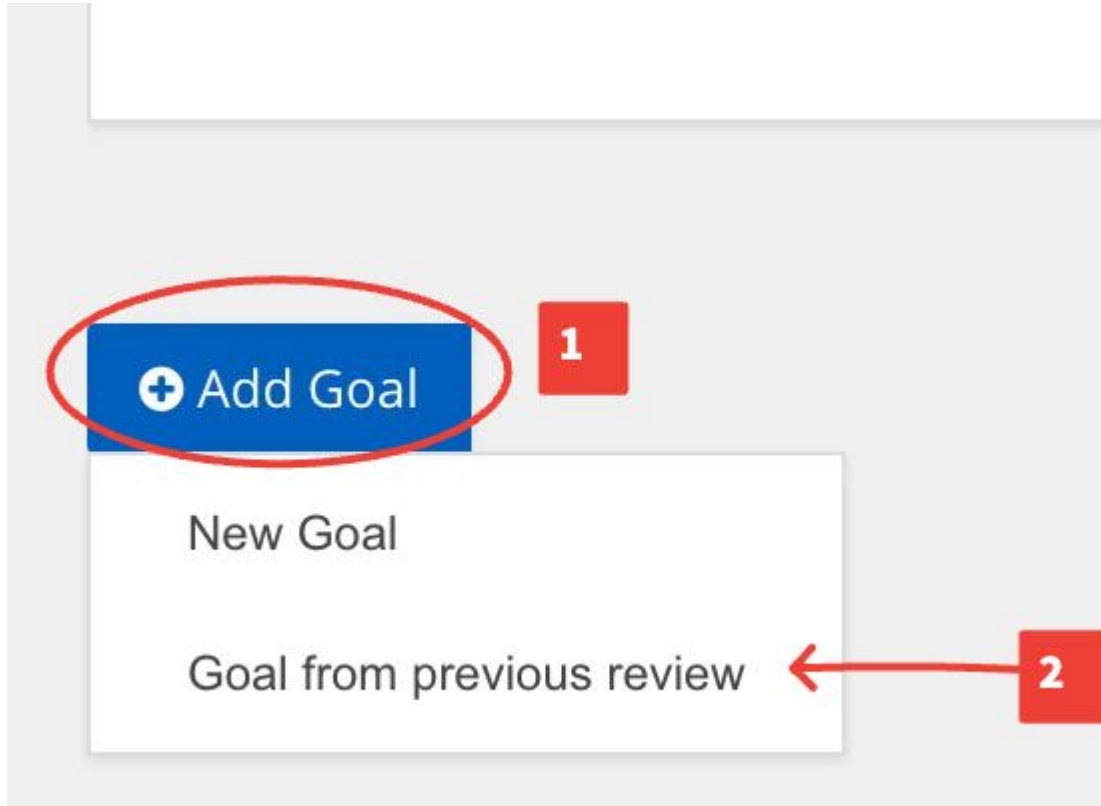
Status  ▾ **← Input other goal details here**

Target date  **← Input other goal details here**

Attachment  **← Input other goal details here**

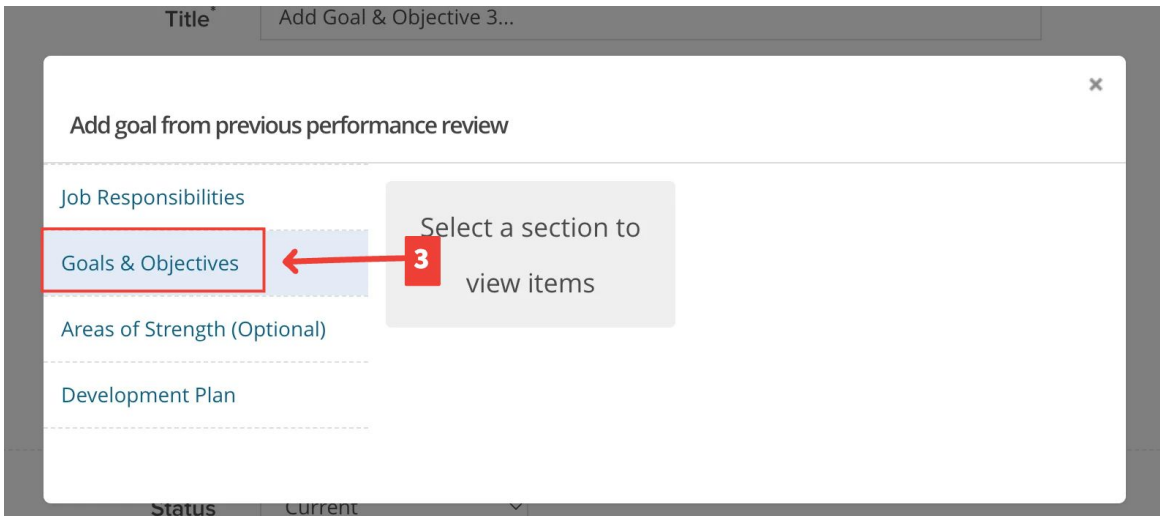
# Adding Goals from Previous Review

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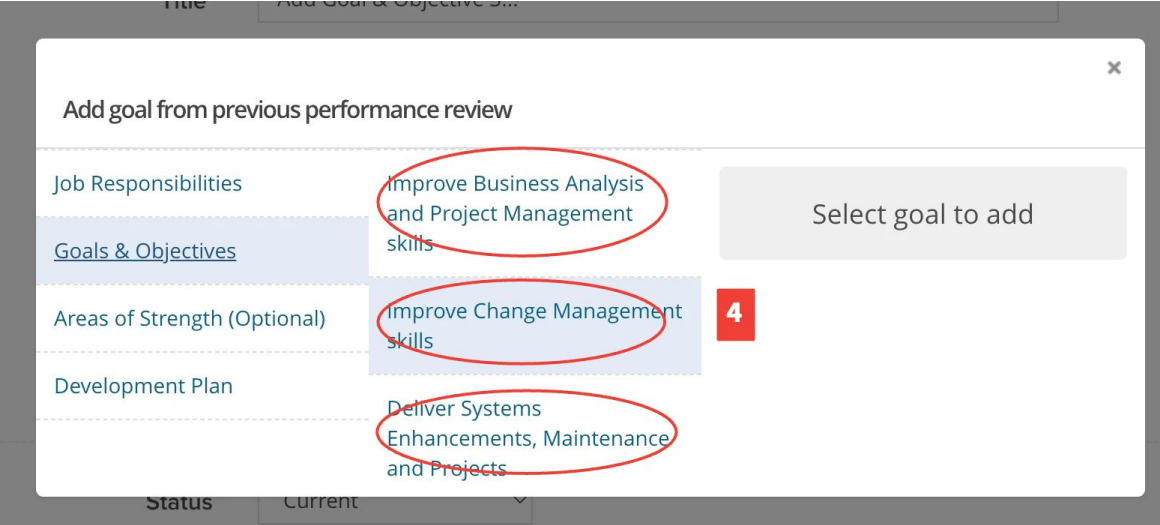
1. Click **Add Goal** (located towards the bottom of the screen)
2. Click **Goal from previous review**

# Adding Goals from Previous Review



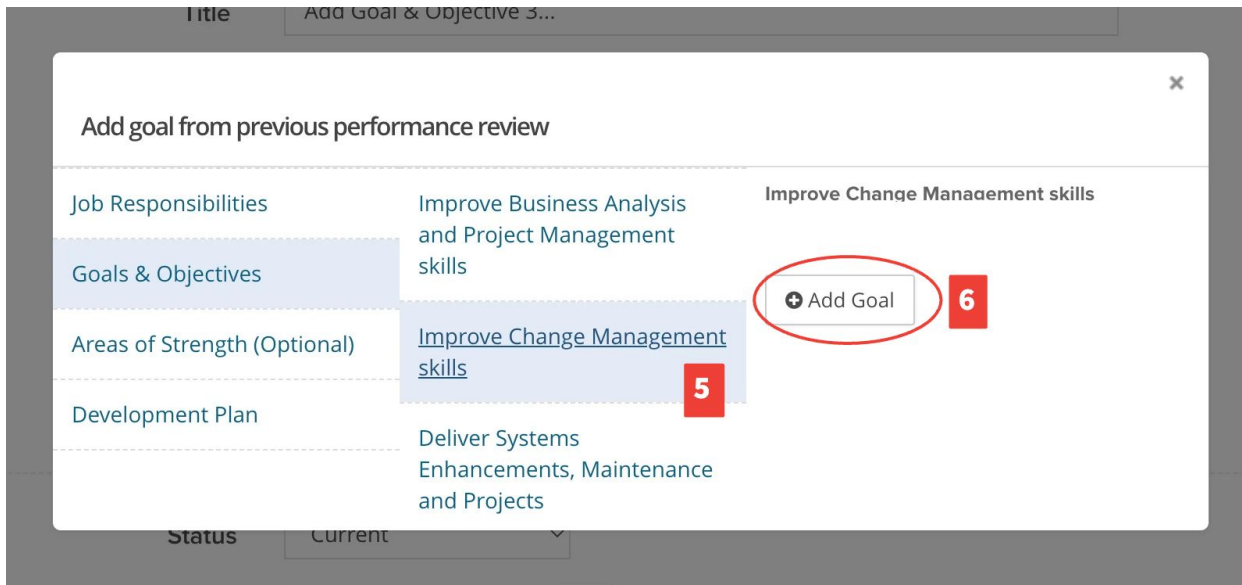
3. Click **Goals & Objectives**

4. Review goals from your previous review



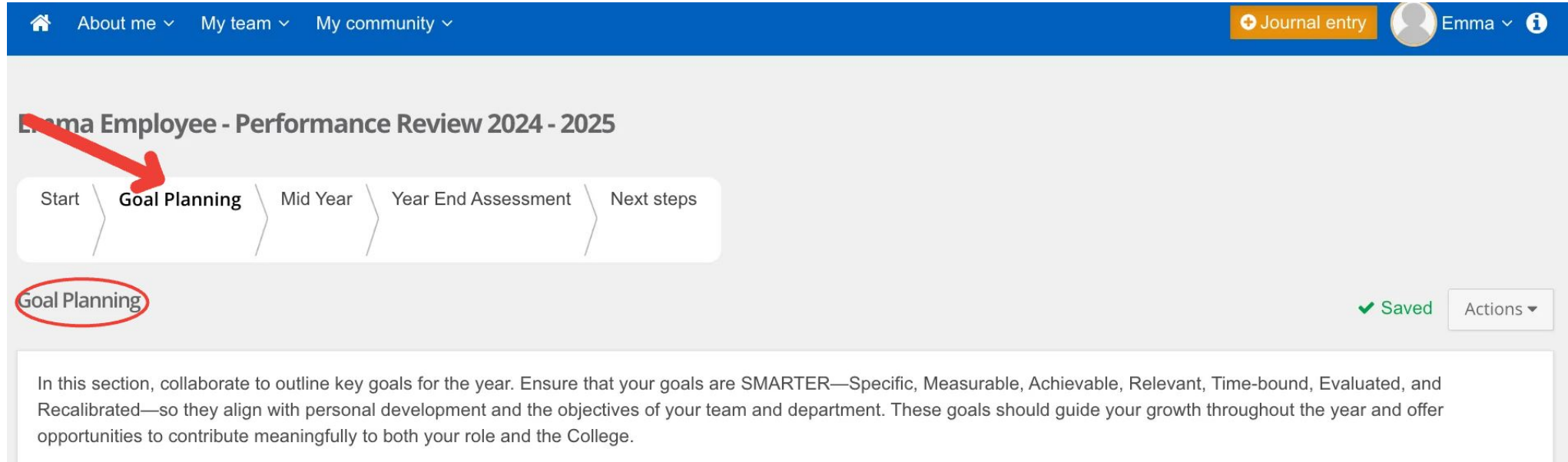


# Adding Goals from Previous Review



5. Select a specific goal. It will be highlighted in blue.
6. Click **Add Goal**. It will be added to your goal listing in the Goal tab.

# Moving to the Next Tab



Emma Employee - Performance Review 2024 - 2025

Start | **Goal Planning** | Mid Year | Year End Assessment | Next steps

Goal Planning

✓ Saved Actions ▾

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the objectives of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

- To navigate between tabs, simply push the tab name
- To help you keep track of which tab you're in, refer to the top of the section, where the tab name is also displayed

# Mid Year & Year End Assessment Tabs

Although these tabs are visible, please skip them during the Initial Goal Planning stage. The items are locked, and no action is required.

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > **Mid Year** > Year End Assessment > Next steps

Mid Year ✓ Saved Last saved: Oct 21, 2024, 1:43pm Actions ▾

At this stage of Initial Goal Planning, please skip this tab. You will enter information in this section during the Mid-Year Progress Review.

🔒 Is your employee on track to achieve their performance goals?

← Back Next →

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > Mid Year > **Year End Assessment** > Next steps

Year End Assessment ✓ Saved Last saved: Oct 21, 2024, 1:43pm Actions ▾

At this stage of Initial Goal Planning, please skip this tab. You will enter information in this section during the Year-End Assessment.

🔒 What were your key achievements this year, and how did you accomplish them?  
Description

🔒 How have you grown and developed in your role over the past year?  
Description

← Back Next →

# Next steps Tab

- Each stage will also include a **Next Steps** tab, where you can view a summary of your progress so far.
- You'll also see the upcoming stage name.
- You'll have the option to proceed to it if desired.

Start > Goal Planning > Mid Year > Year End Assessment > **Next steps**

Last saved: Oct 23, 2024, 1:35pm Action

Summary

Summary

▼ Goal Planning

1. final test  
2. goal 1

► Mid Year

► Year End Assessment

Your next step: **Mid-Year Progress Review** Employee

**This will always show the next stage you're moving to.**

**This button will progress the review to the next step**

Go to next step

**i** Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

# Stage 2: Mid-Year Progress Review

Initial Goal  
Planning

Mid-Year  
Progress  
Review

Year-End  
Assessment

# Stage 2: Mid-Year Progress Review

Home About me My team My community Journal entry Emma

WARNING: You are controlling an employee. Close your controlling session

### Emma Employee - Performance Review 2024 - 2025

Start Goal Planning Mid Year Year End Assessment Next steps

Last saved: Oct 21, 2024, 2:47pm Actions

You are in the **Mid Year Progress Review - Employee** Stage

**Employee's Responsibilities:** In this section, reflect on your progress towards the SMARTER Goals you set at the beginning of the performance year. Evaluate the actions you've taken, the milestones achieved, and any challenges encountered. Once completed, submit your mid-year review to your manager for discussion and feedback.

Tip: Schedule a check-in with your manager to review your progress and, if needed, recalibrate your goals to ensure you stay aligned and on track.

Next →

The **Mid-Year Progress Review** begins with the employee, who will reflect on their progress toward the SMARTER goals. Afterward, the employee will pass it on to their manager for their feedback.

# Goal Planning tab as the Employee

## Emma Employee - Performance Review 2024 - 2025

Start **Goal Planning** Mid Year Year End Assessment Next steps

✓ Saved Last saved: Oct 24, 2024, 2:00pm Actions ▾

### Goal Planning

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit

#### Deliver Systems Enhancements, Maintenance and Projects Current

- both planned and ad hoc request

📅 Target date

---

Save & Share Save as Private Cancel

**This button will save your comments as a draft**

**This button will save your comments and share them with your manager**

There are no comments for this item.

During the **Mid Year Progress Review**, please review each listed goal and add your comments towards your progress.

# Mid Year tab as the Employee

- In the **Mid Year** tab, please reflect on your progress towards the SMARTER goals and record your thoughts here. This will be viewable by your manager
- Afterwards, you'll pass the review to your manager.
- They will also reflect on your progress.
- You will be able to review their feedback after that.

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > **Mid Year** > Year End Assessment > Next steps

Mid Year ✓ Saved Last saved: Oct 21, 2024, 2:47pm Actions

**Employee's Responsibilities:** In this section, reflect on your progress towards the SMARTER Goals you set at the beginning of the performance year. Evaluate the actions you've taken, the milestones achieved, and any challenges encountered. Once completed, submit your mid-year review to your manager for discussion and feedback.

**Manager's Responsibilities:** Allow your employee time to reflect on their progress and submit their feedback. Once they have completed this step, you will receive the review for your input. You can then assess their progress, provide feedback on their strengths, and identify areas for improvement to help enhance their performance.

The mid-year review is an opportunity to assess progress toward the goals set at the beginning of the year. Reflect on key achievements, actions taken, and any obstacles encountered. This stage is also a chance to engage in a constructive dialogue to receive feedback, recalibrate goals if necessary, and ensure alignment with evolving team and organizational priorities.

Is your employee on track to achieve their performance goals?

**Respond to question by adding a comment**

Add comment

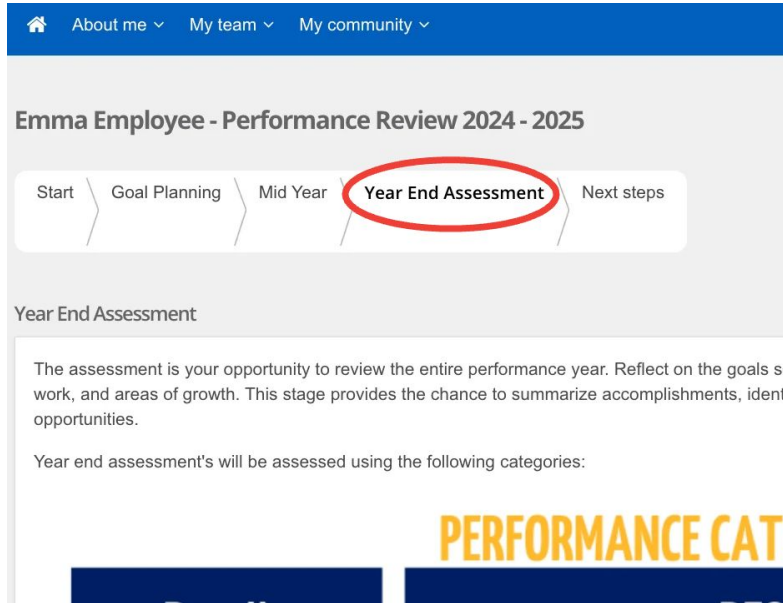
Hannah Masbad  
★ ★  
Not rated

**Manager's response to question. Employee to review response at later stage.**

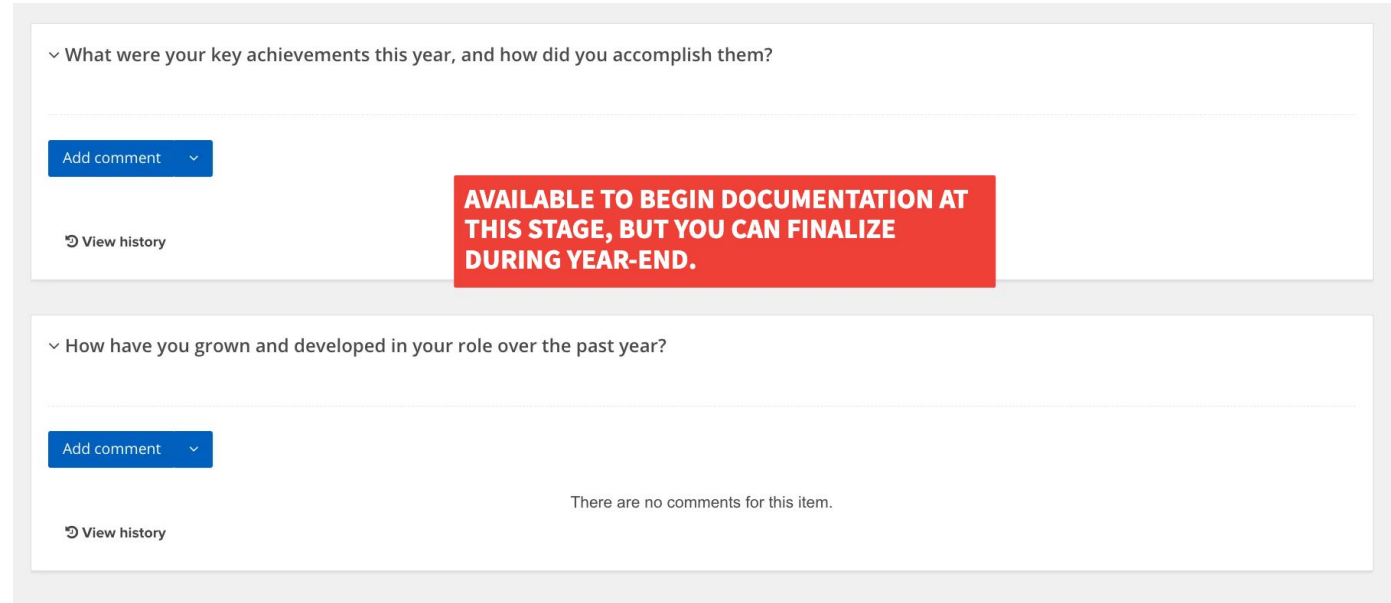
There are no comments for this item.



# Year End Assessment tab as the Employee



The screenshot shows a navigation bar with 'About me', 'My team', and 'My community'. Below it, the title 'Emma Employee - Performance Review 2024 - 2025' is displayed. A progress bar contains five steps: 'Start', 'Goal Planning', 'Mid Year', 'Year End Assessment' (circled in red), and 'Next steps'. Below the progress bar, the 'Year End Assessment' section is titled, followed by a paragraph of introductory text and a list of assessment categories. A 'PERFORMANCE CAT' logo is partially visible at the bottom.



The screenshot displays two assessment questions. The first question is 'What were your key achievements this year, and how did you accomplish them?'. Below it is a text input area, an 'Add comment' button, and a 'View history' link. A red callout box is overlaid on this section with the text: 'AVAILABLE TO BEGIN DOCUMENTATION AT THIS STAGE, BUT YOU CAN FINALIZE DURING YEAR-END.' The second question is 'How have you grown and developed in your role over the past year?'. It also features a text input area, an 'Add comment' button, and a 'View history' link. Below the input area, it states 'There are no comments for this item.'

During the Mid-Year Progress Review stage, you may begin documentation to these questions. However, you will have the opportunity to address and finalize your responses during the final stage of the performance process.

# Next steps tab as the Employee

The screenshot shows a navigation bar at the top with five tabs: 'Start', 'Goal Planning', 'Mid Year', 'Year End Assessment', and 'Next steps'. The 'Next steps' tab is highlighted with a red circle. Below the navigation bar, there is a section for 'Supervisor Overall Rating' which is 'Not rated'. The main content area is titled 'Item summary' and shows a list of items. The first item is 'Goal Planning' by 'Hannah Masbad', with a list of tasks: '1. Deliver Systems Enhancements, Maintenance and Projects' and '2. Improve Change Management'. Below this are sections for 'Mid Year' and 'Year End Assessment' with a five-star rating. At the bottom, there is a progress bar with five steps. The second step, 'Mid-Year Progress Review - Manager', is highlighted with a red box. Below the progress bar, there is a yellow warning box with the text: 'Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step'. Below the warning box, there is a red callout box with the text: 'Press this button to pass the review to your manager' and a blue button labeled 'Go to next step'.

Now the employee will pass the **Mid-Year Progress Review** to their manager.

Please push the “Go to next step” button

# Goal Planning tab as the Manager

## Emma Employee - Performance Review 2024 - 2025

Start **Goal Planning** Mid Year Year End Assessment Next steps

✓ Saved Last saved: Oct 24, 2024, 2:00pm

Actions ▾

### Goal Planning

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit

▼ Deliver Systems Enhancements, Maintenance and Projects Current

- both planned and ad hoc request

📅 Target date

Save & Share Save as Private Cancel

**This button will save your comments and share them with your manager**

**This button will save your comments as a draft**

There are no comments for this item.

During the **Mid Year Progress Review**, please review each listed goal and new comments the employee may have added. You can add your comments on your employee's progress.

# Mid Year tab as the Manager

Home About me My team My community Reports Create Journal entry Hannah

## Emma Employee - Performance Review 2024 - 2025

Start Goal Planning **Mid Year** Year End Assessment Next steps

Mid Year ✓ Saved Last saved: Oct 21, 2024, 2:51pm Actions

**Employee's Responsibilities:** In this section, reflect on your progress towards the SMARTER Goals you set at the beginning of the performance year. Evaluate the actions you've taken, the milestones achieved, and any challenges encountered. Once completed, submit your mid-year review to your manager for discussion and feedback.

**Manager's Responsibilities:** Allow your employee time to reflect on their progress and submit their feedback. Once they have completed this step, you will receive the review for your input. You can then assess their progress, provide feedback on their strengths, and identify areas for improvement to help enhance their performance.

The mid-year review is an opportunity to assess progress toward the goals set at the beginning of the year. Reflect on key achievements, actions taken, and any obstacles encountered. This stage is also a chance to engage in a constructive dialogue to receive feedback, recalibrate goals if necessary, and ensure alignment with evolving team and organizational priorities.

Is your employee on track to achieve their performance goals?

**Respond to this question by clicking "Yes" or "No"**

Hannah Masbad  
★ ★  
Yes

Manager writing a comment **Provide feedback for your employee here**

Save & Share Save as Private Cancel

Comment Emma Employee  
Emma writing if she's on track or not. **You can read your employee's self reflection here**

Today at 2:50 PM

- Please review your employee's Mid Year reflection.
- Then you can write your feedback.
- Lastly, you will use the stars to respond "Yes" or "No" to the question

# Year End Assessment tab as the Manager

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > Mid Year > **Year End Assessment** > Next steps

Year End Assessment

The assessment is your opportunity to review the entire performance year. Reflect on the goals set, work, and areas of growth. This stage provides the chance to summarize accomplishments, identify opportunities.

Year end assessment's will be assessed using the following categories:

**PERFORMANCE CATEGORIES**

What were your key achievements this year, and how did you accomplish them?

Add comment

View history

**AVAILABLE TO BEGIN DOCUMENTATION AT THIS STAGE, BUT YOU CAN FINALIZE DURING YEAR-END.**

How have you grown and developed in your role over the past year?

Add comment

View history

There are no comments for this item.

During the Mid-Year Progress Review stage, you may begin documentation to these questions. However, you will have the opportunity to address and finalize your responses during the final stage of the performance process.

# Next steps tab as the Manager

- A score will now populate in the manager Overall Rating section. Please disregard as it is intended to compile all ratings accumulated over the course of the entire process
- Click “Go to the next step” to progress the ACE review along

Start > Goal Planning > Mid Year > Year End Assessment > **Next steps**

**Please disregard this rating during the Mid-Year Progress Review, as it is intended to compile all ratings accumulated over the course of the entire process**

Supervisor Overall Rating 2 / 5

Met some but not all expectations: Sometimes meets expectations, or Partially completed the objective - Inconsistent Performance. Does not perform the job satisfactorily; Does not produce the quantity, quality, and timelines of work expected;

Item summary Hannah Masbad

- Item summary
- Goal Planning
- Mid Year
- Year End Assessment ★★★★★

Your next step: **Year-End Assessment - Employee**

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

**Click to progress to next stage** → [Go to next step](#)

# Stage 3: Year-End Assessment

Initial Goal  
Planning

Mid-Year  
Progress  
Review

Year-End  
Assessment

# Stage 3: Year-End Assessment

Emma Employee - Performance Review 2024 - 2025

Start > Goal Planning > Mid Year > Year End Assessment > Next steps

Last saved: Oct 25, 2024, 6:45pm Actions ▾

You are in the Year End Assessment - Employee Stage

**Employee's Responsibilities:** In this section, reflect on your performance over the entire year, focusing on the goals and objectives you set. These responses should highlight the progress you've made, your contributions to the team and department, and the ways in which you've expanded your skills and capabilities. Once completed, submit your assessment to your manager for review and a year-end performance discussion. As part of your review, please provide thoughtful answers to the following questions.

Tip: Use this opportunity to take pride in your accomplishments and identify areas for continued growth as you prepare for the upcoming year.

The **Year End Assessment** also begins with the employee, who will reflect on their progress toward the SMARTER goals. Afterward, the employee will pass it on to their manager for their final feedback.



# Goal Planning tab as the Employee

## Emma Employee - Performance Review 2024 - 2025

Start **Goal Planning** Mid Year Year End Assessment Next steps

✓ Saved Last saved: Oct 24, 2024, 2:00pm

Actions ▾

### Goal Planning

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit

▼ Deliver Systems Enhancements, Maintenance and Projects Current

- both planned and ad hoc request

📅 Target date

Save & Share Save as Private Cancel

**This button will save your comments and share them with your manager**

**This button will save your comments as a draft**

There are no comments for this item.

During the **Year End Assessment**, you have one last opportunity to provide any self reflection on each goal

# Mid Year tab as the Employee

No action is needed by the employee on this tab during the Year End Assessment.

Instead, you may review the feedback from your manager

The screenshot shows a performance review interface for Emma Employee for the 2024-2025 period. The top navigation bar includes 'About me', 'My team', and 'My community'. The main header is 'Emma Employee - Performance Review 2024 - 2025'. A progress bar shows the current stage as 'Mid Year', with other stages being 'Start', 'Goal Planning', 'Year End Assessment', and 'Next steps'. A 'Journal entry' button and the user's name 'Emma' are in the top right. Below the progress bar, the 'Mid Year' section is active, with a 'Saved' status and a timestamp of 'Oct 21, 2024, 2:56pm'. The content area contains instructions for 'Employee's Responsibilities' and 'Manager's Responsibilities'. Below this, a question asks 'Is your employee on track to achieve their performance goals?'. A response from 'Hannah Masbad' is shown with a 'Yes' rating and two stars. A comment section at the bottom shows a comment from 'Manager writing a comment' and a comment from 'Emma writing if she's on track or not.'.

# Year End Assessment tab as the Employee

What were your key achievements this year, and how did you accomplish them?

[Save & Share](#) [Save as Private](#) [Cancel](#)

[View history](#) There are no comments for this item.

How have you grown and developed in your role over the past year?

[Add comment](#)

[View history](#) There are no comments for this item.

Summary: Year End Assessment

**Hannah Masbad**

★★★★★  
Not rated

[View history](#)

Self reflect and respond to each listed question.

Afterwards, you will pass the review to your manager for year-end feedback.

# Next steps tab as the Employee

- A score will now populate in the manager Overall Rating section. Please disregard as it is intended to compile all ratings accumulated over the course of the entire process. You may see all of your manager's feedback at the end of the process
- Click the "Go to next step" button to pass the year end assessment to your manager

The screenshot displays a performance review interface with a navigation bar at the top containing 'Start', 'Goal Planning', 'Mid Year', 'Year End Assessment', and 'Next steps'. The 'Next steps' tab is highlighted with a red circle. Below the navigation bar, a red-bordered box contains the 'Supervisor Overall Rating' section, showing a score of '2 / 5' and a descriptive text: 'Met some but not all expectations: Sometimes meets expectations, or Partially completed the objective - Inconsistent Performance. Does not perform the job satisfactorily; Does not produce the quantity, quality, and timelines of work expected;'. Below this is an 'Item summary' section with a dropdown arrow, listing 'Goal Planning' (with a sub-item '1. Add your goal(s) here'), 'Mid Year', and 'Year End Assessment' (with a five-star rating). A progress bar below the item summary shows the current step as 'Year-End Assessment - Manager'. At the bottom, a yellow callout box contains a warning icon and the text: 'Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step'. A red arrow points to a blue 'Go to next step' button.

# Goal Planning tab as the Manager

Emma Employee - Performance Review 2024 - 2025

Start **Goal Planning** Mid Year Year End Assessment Next steps

✓ Saved Last saved: Oct 24, 2024, 2:00pm Actions ▾

Goal Planning

In this section, collaborate to outline key goals for the year. Ensure that your goals are SMARTER—Specific, Measurable, Achievable, Relevant, Time-bound, Evaluated, and Recalibrated—so they align with personal development and the goals of your team and department. These goals should guide your growth throughout the year and offer opportunities to contribute meaningfully to both your role and the College.

**Employee's Responsibilities:** Use this section to capture 3 - 5 SMARTER Goals for the current performance year. Once completed, you can submit

▼ Deliver Systems Enhancements, Maintenance and Projects Current

- both planned and ad hoc request

📅 Target date

**This button will save your comments and share them with your manager**

**This button will save your comments as a draft**

Save & Share Save as Private Cancel

There are no comments for this item.

During the **Year-End Assessment**, please review each listed goal and your employee's comments. Then, you can add any final comments on your employee's goals.

# Mid Year tab as the Manager

During the **Year-End Assessment**, you can bypass the Mid Year tab. You have already completed this tab

Home About me My team My community Journal entry Emma

### Emma Employee - Performance Review 2024 - 2025

Start Goal Planning **Mid Year** Year End Assessment Next steps

Mid Year ✓ Saved Last saved: Oct 21, 2024, 2:56pm Actions

**Employee's Responsibilities:** In this section, reflect on your progress towards the SMARTER Goals you set at the beginning of the performance year. Evaluate the actions you've taken, the milestones achieved, and any challenges encountered. Once completed, submit your mid-year review to your manager for discussion and feedback.

**Manager's Responsibilities:** Allow your employee time to reflect on their progress and submit their feedback. Once they have completed this step, you will receive the review for your input. You can then assess their progress, provide feedback on their strengths, and identify areas for improvement to help enhance their performance.

The mid-year review is an opportunity to assess progress toward the goals set at the beginning of the year. Reflect on key achievements, actions taken, and any obstacles encountered. This stage is also a chance to engage in a constructive dialogue to receive feedback, recalibrate goals if necessary, and ensure alignment with evolving team and organizational priorities.

Is your employee on track to achieve their performance goals?

Hannah Masbad  
★★  
Yes

Add comment

Comment Hannah Masbad  
Manager writing a comment Today at 2:54 PM

Comment Emma Employee  
Emma writing if she's on track or not. Today at 2:50 PM

# Year End Assessment tab as the Manager

▼ What were your key achievements this year, and how did you accomplish them?

manager comment at year end assessment **Provide feedback by adding a comment**

Save & Share Save as Private Cancel

Comment Emma Employee  
year end comment from emma Today at 3:10 PM

View history

▼ How have you grown and developed in your role over the past year?

Add comment

Comment Emma Employee  
year end comment from emma Today at 3:10 PM

View history

Summary: Year End Assessment

Hannah Masbad  
★★★★★  
Exceeded Expectations

View history  
Exceeded Expectations

**Select a performance review category by selecting a star. Use the chart in the help text section for guidance**

- Review your employee's response to the year end questions
- Provide feedback by using the "Add comment" button
- In the Summary box, use the stars to select your employee's performance category

# Next steps tab as the Manager

- The ACE Performance Review is now complete.
- You will see the complete “manager Overall Rating” now listed.
- Click the “Go to the next step” button to share your final feedback with your employee

The screenshot displays the 'Next steps' tab of the ACE Performance Review 2024-2025 v2 interface. The navigation bar at the top includes 'Start', 'Goal Planning', 'Mid Year', 'Year End Assessment', and 'Next steps'. The main content area shows a 'Supervisor Overall Rating' of 5/5, with a description: 'Exceeded expectation(s) - Exceeds position requirements even on the most difficult and complex aspects of his/her job; Takes on additional assignments without negatively affecting other work;'. Below this is an 'Item summary' section for 'Hannah Masbad', listing 'emma's first goal' and 'emma's second goal'. A progress bar at the bottom indicates the current step is 'Employee Acknowledgement', and a 'Go to next step' button is visible.



# Employee Acknowledgement

Start > Goal Planning > Mid Year > Year End Assessment > Next steps

✓ Saved Last saved: Oct 26, 2024, 6:40pm Actions ▾

Supervisor Overall Rating

5 / 5

Exceeded expectation(s) - Exceeds position requirements even on the most difficult and complex aspects of his/her job; Takes on additional assignments without negatively affecting other work;

Item summary

Item summary Hannah Masbad

▼ Goal Planning

1. Deliver Systems Enhancements, Maintenance and Projects  
2. Improve Change Management

► Mid Year

► Year End Assessment ★★★★★

Final comments

Emma Employee

**B I U** | | | | | | | Source

Hannah Masbad

- ACE is only available for the employee at this time.
- Editing is disabled; the purpose is solely to review all comments.
- Employee may add any last comments at this time

# Other Actions

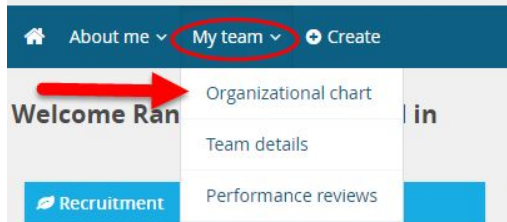


# Cascading Goals as a Manager

## Step 1

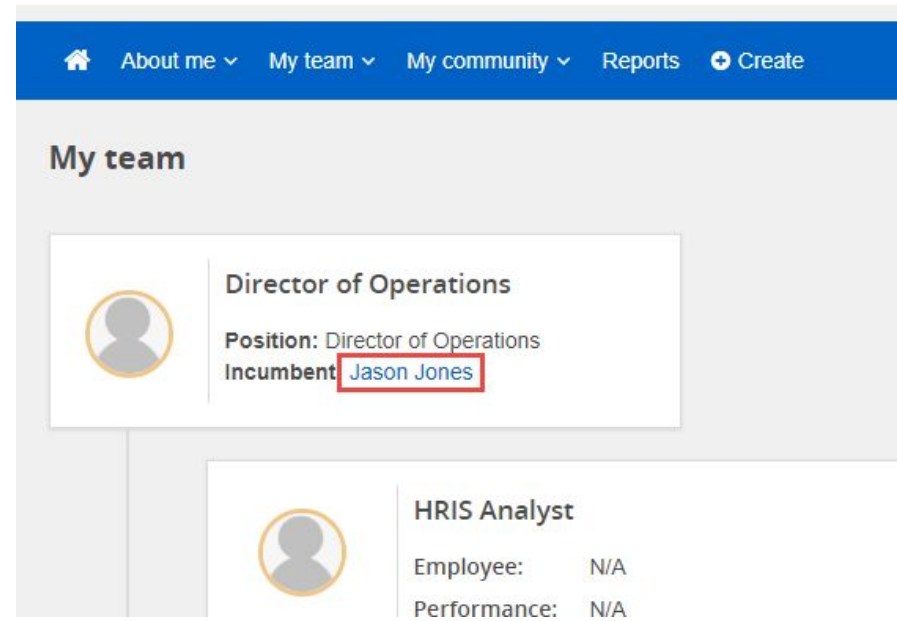
Go to the **Performance Module** home page

Hover over the *'My team'* on the top left and click *'Organizational Chart'*



## Step 2

Click your own name on the organizational chart



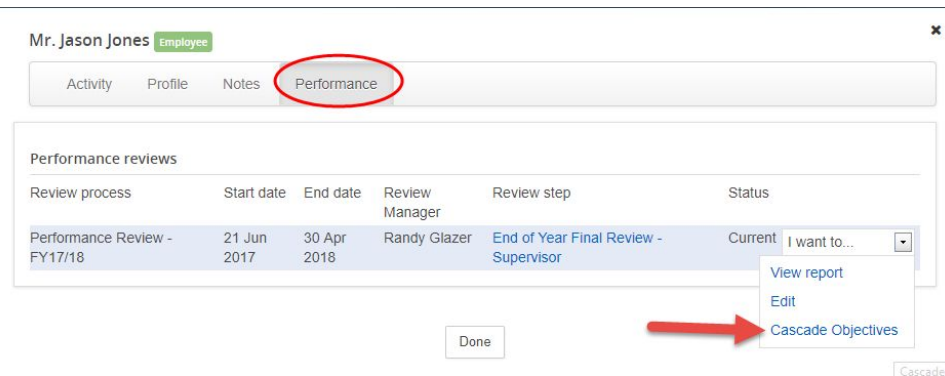
# Cascading Goals as a Manager

## Step 3

Click the *Performance* header.

Locate your current review.

Under **Status** find **Current**. From the 'I want' drop down menu, choose *Cascade Objectives*



Mr. Jason Jones Employee

Activity Profile Notes **Performance**

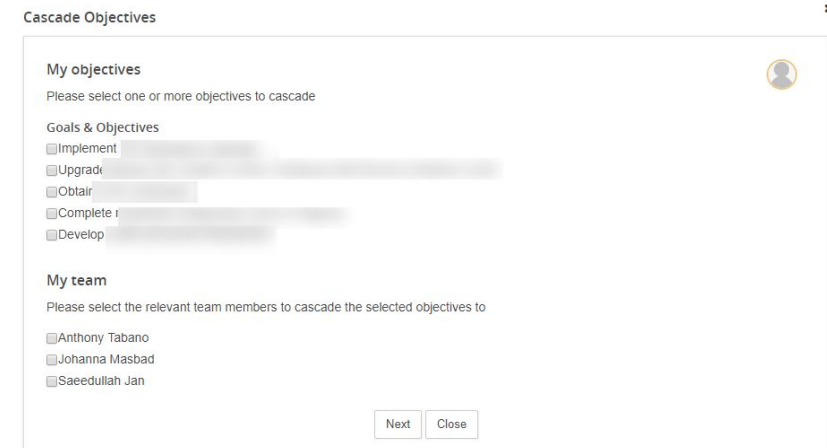
Performance reviews

Review process	Start date	End date	Review Manager	Review step	Status	
Performance Review - FY17/18	21 Jun 2017	30 Apr 2018	Randy Glazer	End of Year Final Review - Supervisor	Current	I want to... View report Edit Cascade Objectives

Done

## Step 4

You will be presented with a listing of your goals and your team members



Cascade Objectives

**My objectives**  
Please select one or more objectives to cascade

**Goals & Objectives**

- Implement
- Upgrade
- Obtain
- Complete r
- Develop

**My team**  
Please select the relevant team members to cascade the selected objectives to

- Anthony Tabano
- Johanna Masbad
- Saeedullah Jan

Next Close

# Cascading Goals as a Manager

## Step 5

Choose the radio button(s) for the applicable goal(s) and team member, and click **Next**

### Cascade Objectives

**My objectives**  
Please select one or more objectives to cascade

**Goals & Objectives**

- Implement
- Upgrade
- Obtain
- Complete
- Develop

**My team**  
Please select the relevant team members to cascade the selected objectives to

- Anthony Tabano
- Johanna Masbad
- Saeedullah Jan

## Step 6

On the next page, confirm the goal/team member combination and click **Next**

### Cascade Objectives

**My objectives**

**Goals & Objectives**

- Upgrade
- Complete

**My team**  
Please select the relevant team members review(s) to cascade the selected objectives to

**Johanna Masbad**

- Performance Review - FY17/18
- Performance Review 2018 - 19

# Cascading Goals as a Manager

---

## Step 7

Your goals have now been cascaded to the appropriate team member

Click **Close**

Cascade Objectives

**My objectives**

Goals & Objectives

Upgrade

Complete

**My team**

Please select the relevant team members review(s) to cascade the selected objectives to

Johanna Masbad

Performance Review - FY17/18

Performance Review 2018 - 19

Next Close

# Accepting Reviews for New Direct Reports

Welcome Hannah, you are logged in

**My Performance Reviews**

Performance Review 2023 - 2024 (OVERDUE)  
Current step: Employee Suggested Goals

Performance Review 2023 - 2024 (OVERDUE)  
Current step: Mid Year Check in

**Recruitment**

Administration

**Team Performance Reviews** 1

**Action Required**

- There is a performance review not assigned to you **Show me**

Emma Employee

The screenshot shows a user interface with a navigation menu on the left. The 'Team Performance Reviews' item is highlighted with a red oval and has a red badge with the number '1'. Below it, an 'Action Required' notification box is visible, containing a message about a performance review not assigned to the user and a 'Show me' link. A red arrow points to the 'Show me' link, and a red badge with the number '2' is placed next to it. The user's name 'Emma Employee' is visible at the bottom of the page.

If you are assigned a new direct report and they have a performance review in progress, you will be prompted to accept their review.

To do so, please do the following:

1. Head to the **Team Performance Reviews** section
2. You'll be presented with an "Action Required" box. Please click "**Show me**"

# Accepting Reviews for New Direct Reports

## My team performance reviews

The following employees report to you, however their reviews are not assigned to you:

Cody Rassi, Supervisor Finalization of Goals **Action review** View report

Please **refresh the page** to see performance reviews that you have just taken ownership.

### Action review

The review for Cody Rassi is currently assigned to Meriam Polilen, however Cody reports to you.

Please choose an action:

Assign the review to me (take ownership)

Keep the review assigned to Meriam Polilen and create a new review for Cody

Keep the review assigned to Meriam Polilen (action)

Save Cancel

3. You will be taken to a new screen displaying the name of your new direct report. Click on **“Action Review”** to proceed.
4. You will see an alert showing who the review is currently assigned to. To take ownership, check the box next to **“Assign the review to me (take ownership),”** then click **“Save.”**



# Accepting Reviews for New Direct Reports

## My team performance reviews

❗ The **5** wing employees report to you, however their reviews are not assigned to you:  
Please refresh the page to see performance reviews that you have just taken ownership

### Team Performance Reviews

Emma Employee >

Cody Rassi v

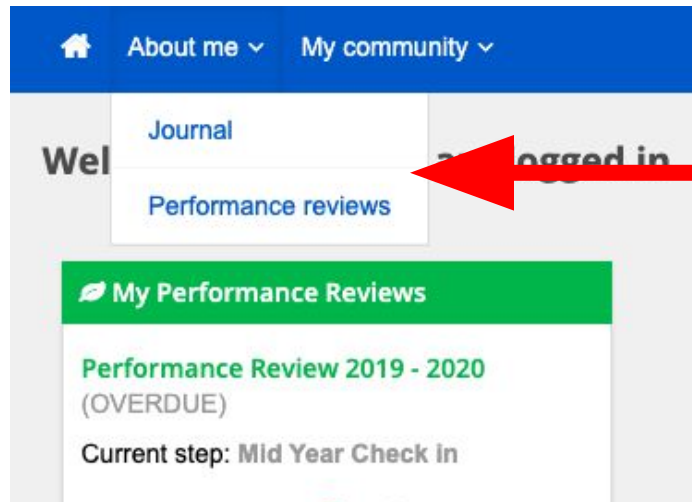
**6**  
Performance Review 2023 - 2024

Current step: Supervisor Finalization of Goals



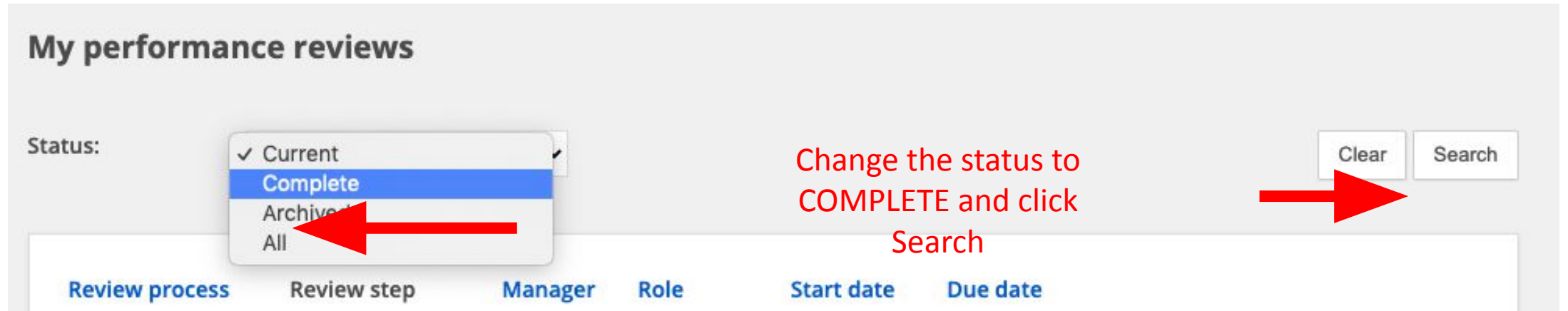
5. Refresh your page.
6. Now head back to your performance module home page. Navigate to the **Team Performance Reviews** section and you will now see you

# Viewing Completed Performance Reviews



In the About me tab,  
click the Performance  
review link

You will see all of your performance reviews



Change the status to  
COMPLETE and click  
Search

# Printing Completed Performance Reviews

## My performance reviews

Status:

Complete



Clear

Search

Review process	Review step	Manager	Role	Start date	Due date	
----------------	-------------	---------	------	------------	----------	--

Performance Review 2019 - 2020	Complete	Andrew Manager	Professional staff	13 Sep 2019	30 Sep 2019	I want to...
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Performance Review 2019 - 2020	Complete	Johanna Masbad	Professional staff	14 Oct 2019	14 Oct 2020	I want to...
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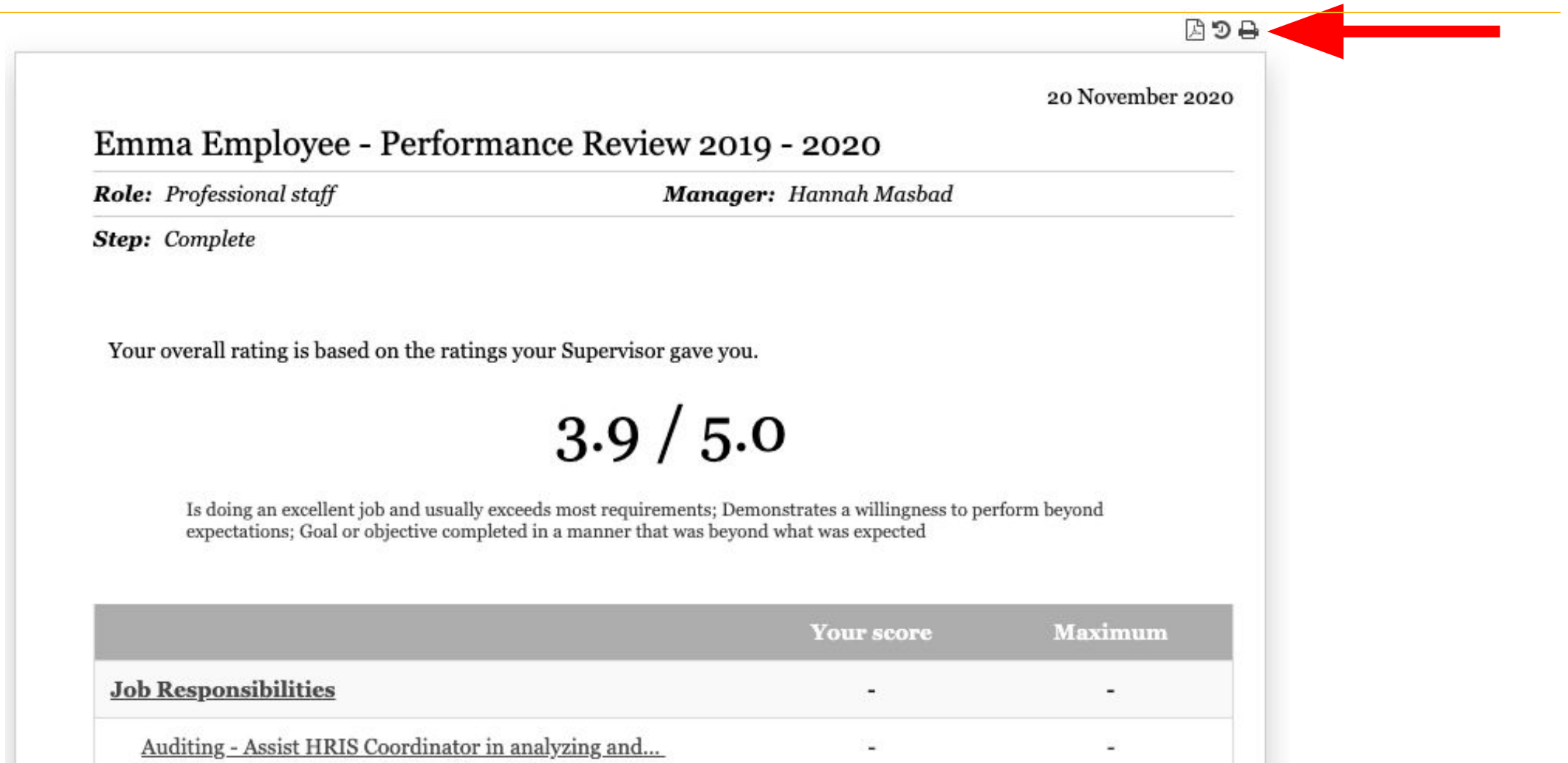
Performance Review 2020 - 2021	Complete	Johanna Masbad	Professional staff	30 Sep 2020	20 Sep 21	
--------------------------------	----------	----------------	--------------------	-------------	-----------	--

- View the report
- View progress report
- View the review process

Page 1 of 1 Jump to page

Records 1 to 3 of 3

# Sample: PDF Version of Completed Review



20 November 2020

## Emma Employee - Performance Review 2019 - 2020

**Role:** *Professional staff* **Manager:** *Hannah Masbad*

**Step:** *Complete*

Your overall rating is based on the ratings your Supervisor gave you.

# 3.9 / 5.0

Is doing an excellent job and usually exceeds most requirements; Demonstrates a willingness to perform beyond expectations; Goal or objective completed in a manner that was beyond what was expected

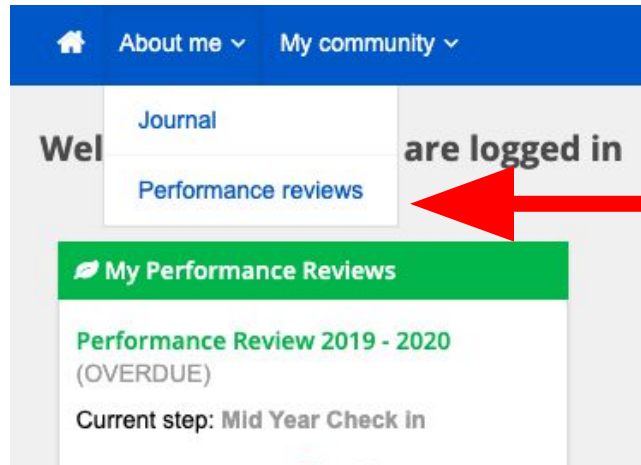
	Your score	Maximum
<b><u>Job Responsibilities</u></b>	-	-
<u>Auditing - Assist HRIS Coordinator in analyzing and...</u>	-	-

# Appendix A: Performance Categories

Results	DESCRIPTION
Exceptional Results	<b>Exceeded goals:</b> Exceeds position requirements even on the most difficult and complex aspects of his/her job; Takes on additional assignments without negatively affecting other work; Goal or objective completed thoroughly, completely, and on or ahead of schedule
Successful Results	<b>Exceeded some goals:</b> Is doing an excellent job and usually exceeds most requirements; Demonstrates a willingness to perform beyond expectations; Goal or objective completed in a manner that was beyond what was expected
Achieved Results	<b>Met goals:</b> Is doing a good job; Handles most assignments within the scope of his/her responsibility; Does not require significant improvement; Completed the goal or objective as established
Achieved some, but not all Results	<b>Met some but not all goals:</b> Sometimes meets expectations, or Partially completed the objective - Inconsistent Performance. Does not perform the job satisfactorily; Does not produce the quantity, quality, and timelines of work expected; Unsatisfactory progress in attaining the goal or objective
Did not achieve Results	<b>Did not meet goals:</b> Does not meet performance requirements or did not complete the objective; Does not perform the job satisfactorily; Does not produce the quantity, quality, and timelines of work expected; Unsatisfactory progress in attaining the goal or objective

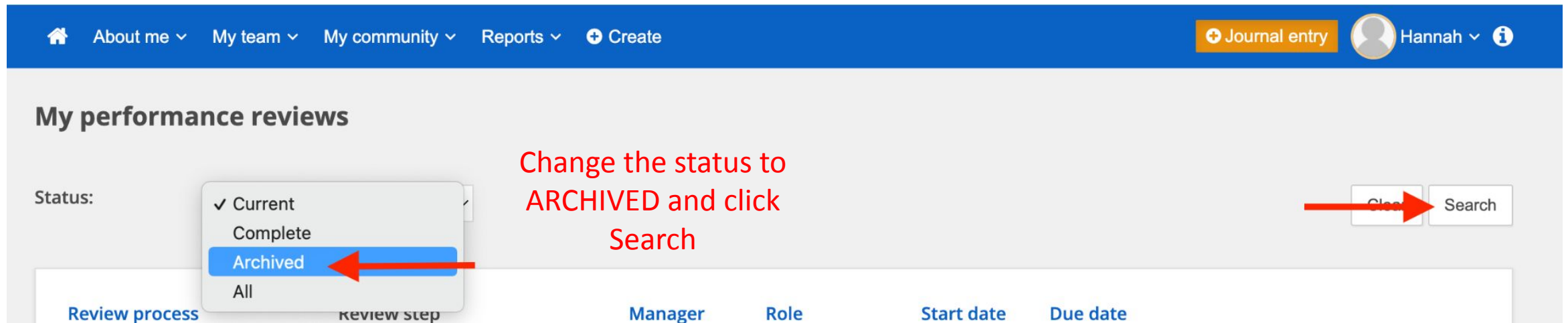
**THE ASSESSMENT OF OVERALL PERFORMANCE WILL CONSIDER BOTH WHAT IS ACHIEVED (RESULTS) AND HOW IT IS ACHIEVED (BEHAVIORS), IMPACTING THE FINAL PERFORMANCE CATEGORY.**

# Viewing Archived Performance Reviews - Employee



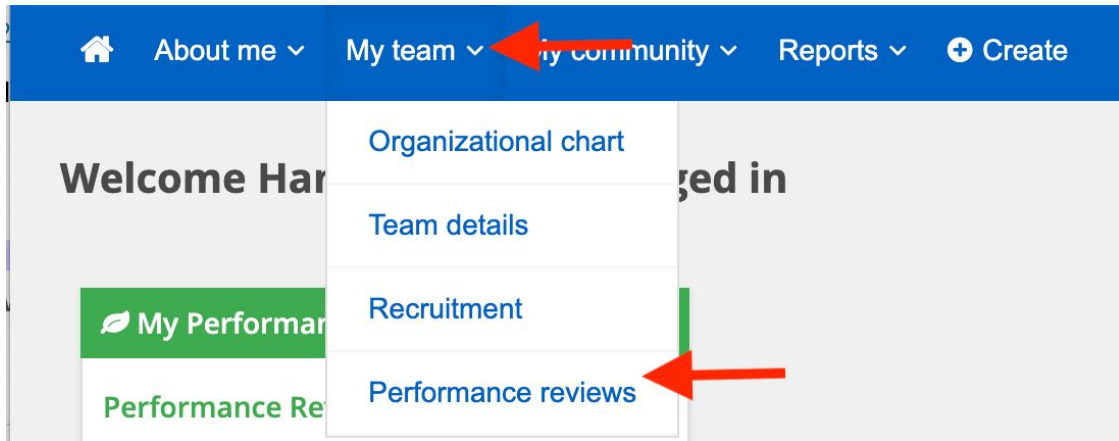
In the About me tab, click the Performance review link

You will see all of your performance reviews



Change the status to ARCHIVED and click Search

# Viewing Archived Performance Reviews - Manager



In the **My team** tab, click the **Performance reviews** link

Change the status to **ARCHIVED** and click **Search**

### My team performance reviews

Employee first name:  Employee last name:

Level:  Status:

Review process step:  Role:

Employee	Review process	Review step	Role	Start date	Due date		
Emma Employee	Performance Review 2018 - 19	Journal	Professional staff	14 Nov 2018	31 Jul 2019	I want to...	<input type="button" value="View report"/>



# Questions?

Contact [HRISTeam@tc.columbia.edu](mailto:HRISTeam@tc.columbia.edu)