

Complete Performance Review (Staff with Self Evaluation)

Overview:

This job aid outlines the activities for an Employee and Manager to complete a Performance Evaluation that uses the Staff with Self Evaluation template.

After the performance template is launched the Employee receives an inbox task to Complete Self Evaluation.

Goal setting should occur several months prior to the performance evaluation time period.

Existing goals on the Employee profile will be locked from editing once the Performance Review is launched. However, goals can be added and existing goals can be edited from within the performance review inbox task. Changes will populate onto the Employee's worker profile when the performance review is complete.

STEPS

Employee Self-Evaluation (Employee)

1. Click the "Self-Evaluation" action item in your inbox.

Note: You can complete the self-evaluation one of two ways:

- Guided Editor: Use a simple step-by-step guide
- Summary Editor: Edit all sections using a one page view (continuous scrolling)

Add Attachments

Employees have the option to add attachments relevant to the performance review. You can click on **Next** to move the first section of you self-evaluation if you have no documents to upload.

2. Click Add



3. Click **Attach** to locate your documents and upload the file and Enter Comments if necessary

Evaluation Supporting Documents
(empty)

File

Attach

Updated By
(empty)

Upload Date
(empty)

Comments

Click to
locate your
document

4. Add comments to provide helpful information as to why this document was added to the review
5. Click the Save icon or anywhere on the screen to save your work. You will see the information you provided as shown below

Employee

Evaluation Supporting Documentation
Employee Self Eval Attachment.dcox

DOC

Updated By
Employee

Upload Date
5/31/2020 3:30 PM

Comments

Add

6. Click **Next** to move to the next section

Goals

Not all departments use goals. If goals are not relevant for your performance review, you can use the **Next** button to move to the next section of the review

7. Please see the Help Available box

NOTE: If you select Show Me, fields will appear to review / enter goal information with question mark icons. Click the icon for further information about the field

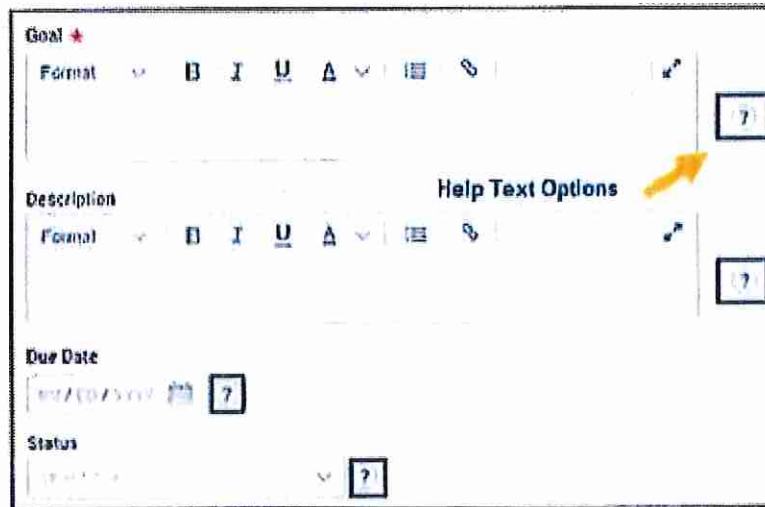
Help Available

Use this icon to view field level help for this page

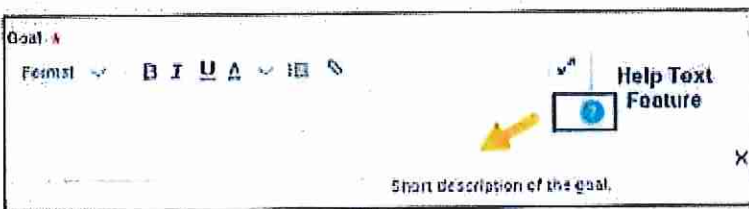
Don't display this message again

Show Me

Click here to see fields and help text options



Below is an example of what the help text looks like when you click on the icon



If you prefer not to have Help Text available, click the "X" and exit message

8. Review each goal to ensure no edits are needed

9. Update information for each goal

Due Date
Enter date here

Status
In Progress

10. Rate yourself on each goal listed and include comments.

Employee Evaluation

Rating
Meets Expectation

Comment
The training is currently being developed

Ratings include:

- Not Applicable
- Does Not Meet Expectations
- Partially Meets Expectations
- Meets Expectations
- Exceeds Expectations
- Significantly Exceeds Expectations

11. Check Use Existing Goals check box if the goal is already existing in your worker profile and needs to be pulled into the review

Use Existing Goal

Goal (add goal)

12. Review prepopulated goals or enter goals and relevant information:
 - Goal. Recommendation: Goals should be written in measurable form to help determine the extent to which they have been met.
 - Description: This field can include more detail information on what the employee will do to meet the goal as well as what resources may be needed to meet the goal.
 - Supports: Applicable to departments that create organizational goals.
 - Due Date: Date by which the employee is expected to have met the goals.
 - Status: Current status on meeting this goal
 - Rating: Select the option you feel represents your performance on this goal.
 - Comment: Enter comments for your manager to support your rating.
13. Rate yourself on each **competency** and provide comments. Please read the Competency and determine your rating. Provide a comment, if applicable.
14. Click Next to move to the next section.

Supervisor Competencies

Not all Employees are supervisors. If this section is not relevant to your position, you can use the **Next** button to move to the next section.

15. Rate yourself on each competency listed and provide comments.
16. Click **Next**
17. Enter ratings for **Responsibilities**. Responsibilities should be prepopulated from your position restrictions. If you do not have responsibilities listed on your position description please contact HR for assistance.

Certification Question

This section is about required trainings you may have been assigned during the evaluation period.

18. Select the appropriate answer in the **Rating** field
 - Select **YES** if you are **past due** on required trainings (if you select **YES**, you may want to add a comment
 - Select **NO** if you are **not past due** on required trainings
19. Click Next to go to the summary section
20. Click **Submit**

21. IMPORTANT: The Manager will not be able to begin their evaluation until the Employee has submitted the Self-Evaluation