The Performance Evaluation Process
AGENDA

- What is a Performance Evaluation?
- How do Employees Benefit from Performance Evaluation’s?
- Understanding the Performance Evaluation Process
- Questions
What is a Performance Evaluation?

• A Performance Evaluation is a constructive process to acknowledge the performance of an employee.

• An employee's Evaluation shall be sufficiently specific to inform and guide the employee in the performance of her/his duties.

• An employee’s Performance Evaluation is not a disciplinary procedure.
Why do we need a Performance Evaluation?

- Links employee performance to the college and department objectives
- Communicates performance expectations to employees for shared understanding
- Recognizes and acknowledges good performance
- Recognizes areas where performance must be improved
How Do Employees Benefit from Performance Evaluation’s?
How Do Employees Benefit from Performance Evaluations?

• Employees have a clear understanding of the job duties set by their supervisor.

• Supervisors acknowledge the employees for his/her accomplishments.

• Opens the lines of communication between the employee and the supervisor
How Do Employees Benefit from Performance Evaluations?
Continued

• Performance Evaluation’s improve employee’s performance and build opportunities for career development

• Performance Evaluation’s offer opportunities to improve job performance when an employee is not meeting requirements and needs improvement

• Encourages employees to take responsibility for their own performance and progress
Understanding the Performance Evaluation Process
The Performance Evaluation Process

Begin planning for Next year’s Performance Evaluation

Start Employee will self evaluate

Supervisor will review employee self-evaluation

Supervisor will gather employee performance data and complete evaluation

Final comments or revisions by employee and supervisor

Performance Evaluation Meeting between employee and supervisor

Supervisor and employee each get a copy and file original with Human Resources
The Performance Evaluation Process

• **Step 1** – Employee will self evaluate and suggest future objectives – then submit this Evaluation to their supervisor
  ▫ Before each Evaluation period, each employee should sit down and write his/her objectives for the next year and accomplishments of the past year. This serves as the employee’s voice during the Evaluation process.
To begin a Performance Evaluation, use the **Change User Type** link on the left and change to the **Employee group**. If you are not creating or approving position descriptions or requisitions, you will only have the Employee user type assigned and will not need to change user types. As listed on the workflow diagram, employees begin an evaluation and submit for approval.

- Click **“Start Evaluation”** on the navigation bar

To start your evaluation, select **“Start Action”** under the evaluation type.

**EMPLOYEE:** Selecting **Save without Submit** allows an Employee to save the evaluation and log in later, Edit, and then submit to the Supervisor for Review. Evaluations that are saved are found by clicking the **Active Evaluations** link.

**SUPERVISOR:** Once an employee has created an evaluation, the Supervisor clicks **Active Evaluations** to edit and assign ratings.
Clicking the Search button without entering criteria will show you all the positions you are assigned as the Employee. If your position does not appear, contact the Human Resource office to give you access to your position description.

Enter the Evaluation Details and then click Continue to Next Page.

Click “Start Action” under the position that will be evaluated.

Enter the Evaluation Details and then click Continue to Next Page.
Do not indicate cycle from drop down list and do not place a check on “annual” for this evaluation.

Enter the **Evaluation Cycle** Dates and then **Continue to Next Page**.

Note: **Evaluation Cycle Dates**:
Evaluation Cycle Begin Date use: 01/01/2017
Evaluation Cycle End Date use: 12/31/2017
Provide **Employee Input** and then click the Continue to Next Page button.
On the **Essential Functions** tab, click the **Edit** link listed below **Description of job responsibility/duty** to provide a rating for EACH function and click **Save Changes** button.

Once you have finished rating EACH **Essential Function**, **Continue to Next Page**.
To select a rating for each Performance Criteria, click the **Edit** link listed below the Criteria and click the **Save Changes** button after each entry.

**Note:** Performance Criteria are maintained by the Human Resources office and are the same for each Classification/Job Title.

After selecting a rating, click the **Continue to Next Page** button.
Click the **Add New Entry** button to enter current goals and needed resources, and then click the **Continue to Next Page** button.

<table>
<thead>
<tr>
<th>Evaluation Details</th>
<th>Employee Input</th>
<th>Essential Functions</th>
<th>Performance Criteria</th>
<th>Current Goals</th>
<th>Future Goals</th>
<th>Performance Improvement</th>
<th>Overall Scores</th>
<th>Overall Rating Comments</th>
</tr>
</thead>
</table>

When you are finished adding your entries, you may go to the next page by clicking "Save and Continue to Next".

To Add A New Entry: Click the **Add New Entry** button.
To Edit An Entry: Click the **Edit** link for the specific entry.
To View An Entry: Click the **View** link for the specific entry.
To Delete An Entry: Click the **Delete** link for the specific entry.

**Existing Entries**

No Records Found

[ADD NEW ENTRY]

[<< RETURN TO PREVIOUS]

[CONTINUE TO NEXT PAGE >>]

[CANCEL]  [PREVIEW EVALUATION]
Enter **Future Goals** that should appear on next year’s evaluation by clicking the **Add New Entry** button. When completed, click Continue to Next Page.

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To add a new entry, complete the following fields and then click the **Add Entry** button. If you do not wish to add a new entry at this time, click the **Cancel** button.

**Existing Entries**

No Records Found

**Add New Entry**

To add a new entry, complete the following fields and then click the **Add Entry** button. If you do not wish to add a new entry at this time, click the **Cancel** button.

* Required information is denoted with an asterisk.

<table>
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<th>Goal:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources/Support Needed:</td>
</tr>
<tr>
<td>Projected Due Date: MM/DD/YYYY -∞ MM-DD-YYYY</td>
</tr>
</tbody>
</table>
“Supervisors” click **Add New Entry** to add **Performance Improvement** entries, if applicable. Once an evaluation is submitted by the employee to the supervisor, the **Add New Entry** button appears. Employees do not have the **Add New Entry** button because they only have view rights to this section.

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[<< RETURN TO PREVIOUS] [CONTINUE TO NEXT PAGE >>]

[ CANCEL ] [ PREVIEW EVALUATION ]
The system determines an overall score based on the rating fields selected by the Supervisor. Separate ratings are assigned for Essential Functions and Performance Criteria. Click **Continue to Next Page**.

**NOTE:** The overall score will not be calculated or displayed until the evaluation has been through the entire flow (i.e. employee and evaluating supervisor).
The **Overall Rating Comments** tab allows Employees and Supervisors to provide additional information about the evaluation. The Supervisor assigns an overall rating so these fields are grayed out when the Employee creates a new evaluation.

*Required information is denoted with an asterisk.*
Once you reach the end of the Performance Evaluation, choose the appropriate step to send the Evaluation and select **Continue** and **Confirm**. You may also click the **Edit** link to return to the beginning of the Evaluation and make changes. Selecting **Save without Submit** allows an Employee to save the evaluation and log in later, Edit, and then submit to the Supervisor for Review. Evaluations that are saved are found by clicking the **Active Evaluations** link.

![Evaluation Details]

Please review the details of the evaluation carefully before continuing.

To take the action you have specified, click the **Continue** button. To edit the evaluation, click the **Edit** link. To exit the evaluation without making any changes, click the **Cancel** button.
VERY IMPORTANT!!!

An evaluation is **Not Saved** until after you have selected an “Evaluation Status”, clicked “Continue”, and then “Confirm” on the final summary page. If you log out or click a link on the left side **BEFORE** completing these steps, the information you have entered **WILL NOT BE SAVED**. For security purposes, the system automatically logs out a user after **60** minutes of inactivity so it is important to save your evaluation throughout the process.
The Performance Evaluation Process

• **Step 2 - Supervisor will review employee self-Evaluation (evaluation)**
  
  ▫ Supervisors should take the employee’s self-Evaluation into consideration when writing the performance Evaluation. The employee self-Evaluation can serve to inform the supervisor of some barriers to performance as seen by the employee.
The Performance Evaluation Process

• **Step 3 - Supervisor will gather employee performance data and complete the Evaluation**
  ▫ The supervisor should gather performance data such as attendance, commendations, complaints, activity summaries, driving and training records.
  ▫ Supervisors should also keep notes on performance, both good and those needing improvement, in some manner during the rating period.
The Performance Evaluation Process

• Step 4 – Performance Evaluation Meeting between employee and supervisor
  ▫ Completing the Evaluation form is only part of the process. It is also necessary for the supervisor and the employee to meet and discuss performance issues. The Performance Evaluation form should serve as a basis for this meeting but its content should be discussed face-to-face.
The Performance Evaluation Process

**Step 5 - Final comments or revisions by employee and supervisor**

- The employee should be allowed to add any comments they wish. Understand that there will not always be agreement.
- After the Evaluation, both the employee and supervisor should sign the form. The employee’s signature does not indicate agreement with Evaluation; it only acknowledges that the employee was given the opportunity to discuss the Evaluation with the supervisor.
The Performance Evaluation Process

- **Step 6 - Supervisor and employee each get a copy and file original with Human Resources**
  - The department should maintain copies of each Evaluation and send the original to Human Resources to be filed in the employee’s permanent personnel file. The employee should also receive a copy of the Evaluation and the new objectives for the next rating period.
Questions ????

If you need assistance, please contact:

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