PERFORMANCE EVALUATION
USER’S GUIDE
PERFORMANCE EVALUATIONS

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.

Once an employee has created and submitted an evaluation to the Supervisor for approval, the Supervisor clicks Active Evaluations to edit and assign ratings.

Click “Start Evaluation” on the navigation bar.

To start your evaluation, select “Start Action” under the Evaluation Type(s).

Choose Evaluation to Start

<table>
<thead>
<tr>
<th>Create New Evaluation</th>
</tr>
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<tbody>
<tr>
<td><strong>1 Record</strong></td>
</tr>
<tr>
<td>⚠ Evaluation Type(s)</td>
</tr>
<tr>
<td>Performance Evaluation</td>
</tr>
<tr>
<td>Start Action</td>
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</tbody>
</table>
Click the Search button and then click the ENTER button. Your position should be listed so you can click on it and start your evaluation. **Remember the evaluation period is for 1/1/2017 to 12/31/2017.** If this is not the job you should be evaluated for this time frame or the correct Evaluating Supervisor, please contact the Human Resources Department before starting your evaluation.

***PLEASE REMEMBER TO USE INTERNET EXPLORER ONLY AND NOT CHROME. CHROME IS NOT COMPATIBLE WITH OUR PERFORMANCE EVALUATION SYSTEM AND WILL NOT SAVE YOUR INFORMATION***

Once your information is populated:

Click **“Start Action”** under the position that will be evaluated.
FROM DROP DOWN LIST - INDICATE “ANNUAL”. DO NOT PLACE A CHECKMARK ON BOX INDICATING “ANNUAL” FOR THIS EVALUATION (LEAVE BLANK). WHEN WE CHECK THIS BOX; IT DELETES THE EVALUATION CYCLE END DATE.

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** (complete all boxes) and then click the **Continue to Next Page** button

<table>
<thead>
<tr>
<th>Evaluation Details</th>
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<th>Performance Criteria</th>
<th>Current Goals</th>
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<th>Overall Scores</th>
<th>Overall Rating Comments</th>
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<tr>
<td>&lt;&lt; RETURN TO PREVIOUS</td>
<td>CONTINUE TO NEXT PAGE &gt;&gt;</td>
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*Required information is denoted with an asterisk.*

- **What I set out to do and did - (My Accomplishments):**

- **What I set out to do and didn’t - (My To Do List):**
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 the **Save Changes** button.

Once you have finished rating EACH **Essential Function**, **Continue to Next Page**.

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**Definitions of terms/ratings:**

**Outstanding** - Outstanding performance of a level rarely achieved by others. Assignments are accomplished at the highest level of performance. (This rating requires supporting comments.)

**Commendable** - Consistently exceeds job requirements with above average quality and quantity. Assignments are accomplished in a highly effective manner with only general guidance.

**Competent** - Performance expected of the experienced employee. Performs all aspects of the job requirements. Assignments and responsibilities are accomplished effectively with a minimum amount of supervision and direction.

**Needs Improvement** - Performs most of the duties but needs further development or doesn’t perform on a consistent basis. (This rating requires supporting comments.)

**Significantly Below Standards** - Does not meet job requirements. Performance well below standard and not acceptable. Requires continual close supervision and direction. Producing inadequate results that require immediate improvement. (This rating requires supporting comments.)

Essential Functions Score:  --
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.

### Performance Criteria “VIEW” for Classified & Professional Staff.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
<th>Supervisor Rating</th>
<th>Supervisor Comments</th>
<th>Employee Rating</th>
<th>Employee Comments</th>
</tr>
</thead>
</table>
| **Communication (Oral & Written)** | - Communicates with clarity.  
- Gives and receives feedback.  
- Writes clear and concise, using appropriate grammar including proofing and editing.  
- Assumes ownership and responsibility for the needs of the customer. | | | | |
| **Dependability** | - Can be relied on to fulfill job responsibilities in both routine and complex job situations.  
- Observes and meets deadlines.  
- Can adapt to changing work demands and is receptive to new ideas and concepts.  
- Uses safe work practices on job.  
- Gets along with people from different cultures and backgrounds. | | | | |

### Performance Criteria “VIEW” for Administrators.

<table>
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<tr>
<th>Criteria</th>
<th>Description</th>
<th>Supervisor Rating</th>
<th>Supervisor Comments</th>
<th>Employee Rating</th>
<th>Employee Comments</th>
</tr>
</thead>
</table>
| **Communication** | - Encourages the open, interactive exchange of thoughts and ideas.  
- Practices active listening skills to understand the message and improve communication.  
- Writes clearly and concisely, using appropriate grammar including proofing and editing.  
- Verbal and written communications are respectful of others. | | | | |
| **Decision Making/Problem Solving** | - Identifies and assesses problems, issues and opportunities.  
- Evaluates information and decides on an appropriate course of action while controlling resources and expenditures.  
- Makes timely and effective decisions and follows through on course of action. | | | | |
Click the **Add New Entry** button to enter current goals and needed resources, and then click the **Continue to Next Page** button.

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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
NOTE: INDICATE FUTURE GOALS TO BE EVALUATED FOR YOUR NEXT EVALUATION CYCLE.

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

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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

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[<< RETURN TO PREVIOUS] [CONTINUE TO NEXT PAGE >>]
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:**
OVERALL SCORE WILL NOT BE CALCULATED OR DISPLAYED UNTIL THE EVALUATION HAS BEEN THROUGH THE ENTIRE FLOW (i.e. both employee and evaluating supervisor have competed the evaluation).

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<tr>
<td>Tab</td>
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<td>Score</td>
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**Overall Scores Score:** --

**Rating Scale:**

- 5.00 - 4.50: Outstanding
- 4.49 - 3.50: Commendable
- 3.49 - 2.50: Competent
- 2.49 - 1.50: Needs Improvement
- Below 1.50: Significantly Below Standards

**<< RETURN TO PREVIOUS**

**CONTINUE TO NEXT PAGE >>**

**CANCEL**

**PREVIEW EVALUATION**
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. Click **Continue to Next Page**.

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**Overall Performance Rating**

| Rating: |
| Overall Rating: |
| Comments or Performance Examples: |

**Comments**

<table>
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<th>Employee Signature</th>
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</table>
Once you reach the end of the Performance Evaluation, please review the details of the evaluation carefully before continuing. If everything is correct, Click on Submit to Evaluating Supervisor for Review >> Continue >> Confirm.

To edit the evaluation, click the Edit link to return to the beginning of the Evaluation and make changes. To exit the evaluation without making any changes, click the Cancel button, this action will not Save the information you have entered.

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.

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, click 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 an evaluation.