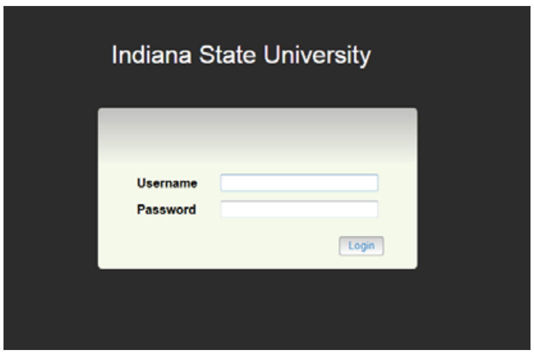
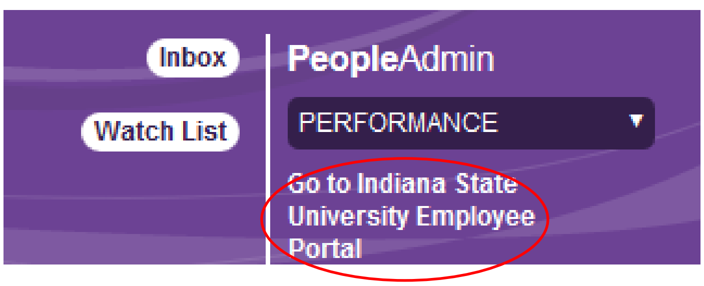
Introductory Performance Evaluation Instructions

Within the first 15 days of your employment, you should sit down with your supervisor to discuss goals for your introductory period. Log into https://jobs.indstate.edu/hr/ or from the Human Resources website main page select the link that reads People Admin (Applicant Tracking) from the Performance Evaluation Materials header.

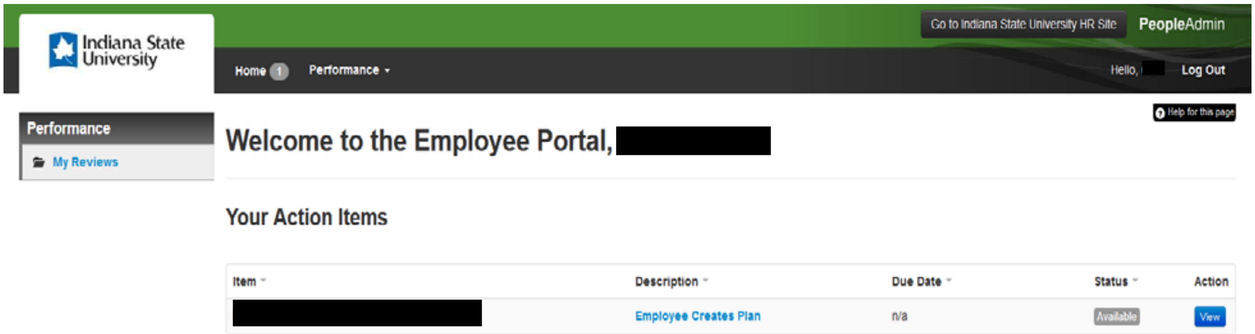
Please enter your University Username and Password.



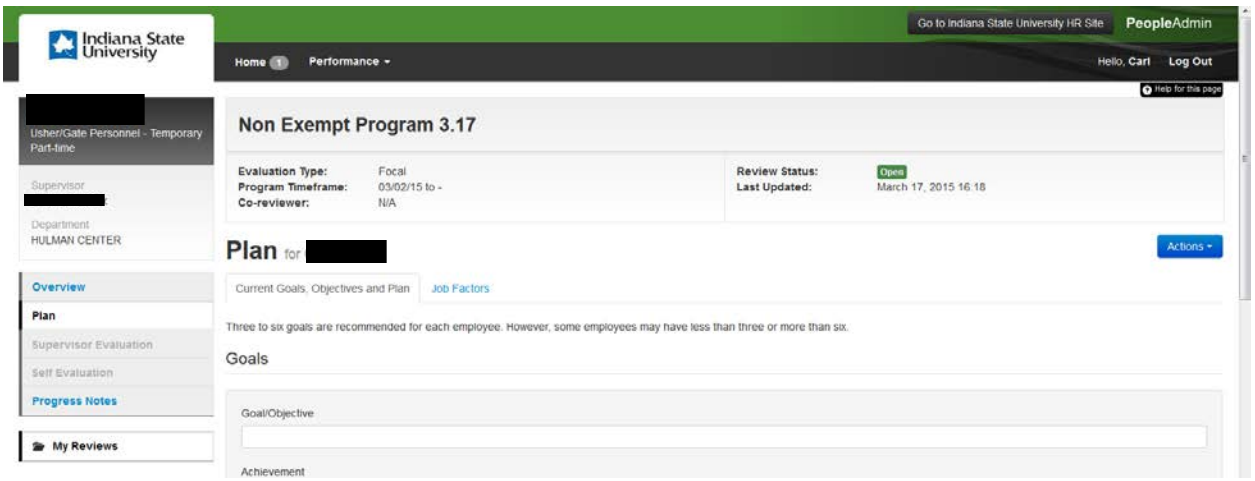
Click on **Go to Indiana State University Employee Portal** as shown below.



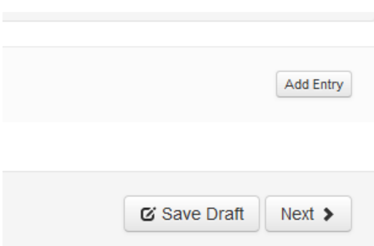
This will bring you to the following screen. You will see the **Home** tab across the top. Clicking on Home will bring you to your **Action Items** (to-do list).



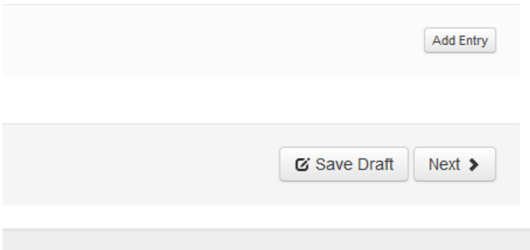
Click on **Employee Creates Plan;** this will bring you to your **Goals.**



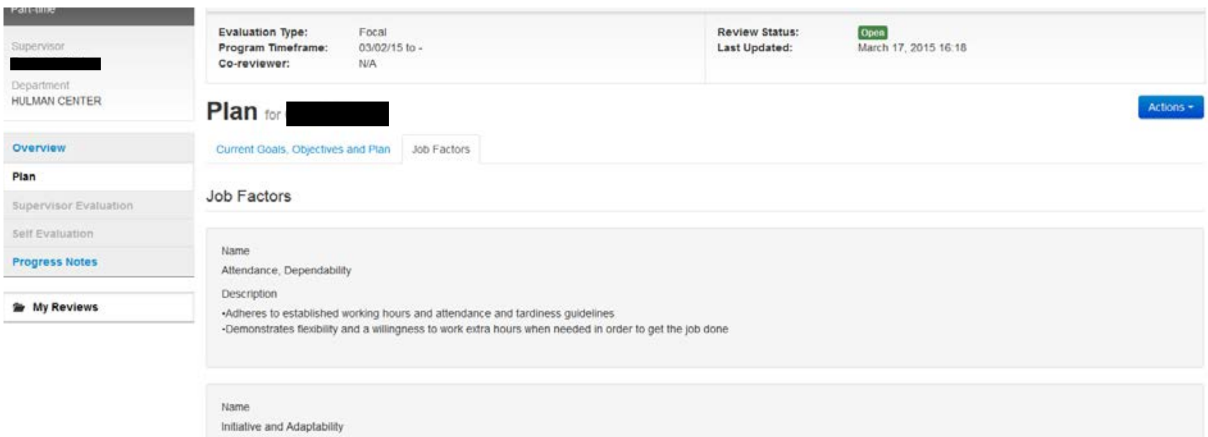
You can add as many goals as you need by simply clicking on the **Add Entry** at the bottom of the page. Each new entry is displayed at the end of the list so scroll down to enter each new goal.



Once you have added all your goals you can click on **Save as draft** (which will allow you to come back to it after you have discussed your proposed goals with your supervisor or determine any additional goals).



Or, you can **Click on next** which will bring you to the **Job Factors Page** (please review these factors as you will be rated on them for the introductory period).



Once you have completed entering your goals and reviewing your job factors, click on the complete button. NOTE: Once you select **Complete** and your supervisor approves the goals, you cannot change or add to the goals without contacting Human Resources so they can reopen the task.

Once you have completed your **Plan,** your supervisor will be notified by email and they will log into their Employee Portal and review the goals you have written. They can **Approve, Revise, or Return.** This should be done within 20 days of your employment.

When the supervisor **Approves** the Plan, you are done and will not need to complete anything else until it's time to complete the **Employee Self-Evaluation**. Approximately 80 days after your hire date, you will be notified by email that it's time to complete the self-evaluation and this should be done within 10 days. When completing the self-evaluation, you must select an employee rating for each category unless that category does not apply and then select "Not Applicable". Comments are highly recommended for each job factor but if you have rated yourself as Outstanding Performance, Performance Needs Improvement, or Unsatisfactory Performance comments are required.

The next tab is **Community Engagement** so please read the instructions and complete if appropriate.

Next is **Current Goals, Objectives, and Plan**. These are the goals you set within the first 15 days of employment. Enter the actual completion date, if appropriate, the goal status, and any comments you wish to add and click **Next**.

The next tab is **Education**. Please answer the questions and click **Next**.

The final tab is **New or Renewed Certifications**. Please answer the questions and then you can either **Save Draft** if you want to review and come back to the review later or select **Complete**.

Once you complete your review, you will see a green bar at the top of the page stating **The Self Evaluation has been marked as complete**. Your supervisor will receive an email stating they need to complete the **Supervisor Evaluation**. This should be completed within 99 days from your hire date or 10 days from receiving the email notification.

When the supervisor completes the **Supervisor Evaluation**, the second level supervisor will receive an email notification and will review the self-evaluation and supervisor evaluation within 10 days of notification.

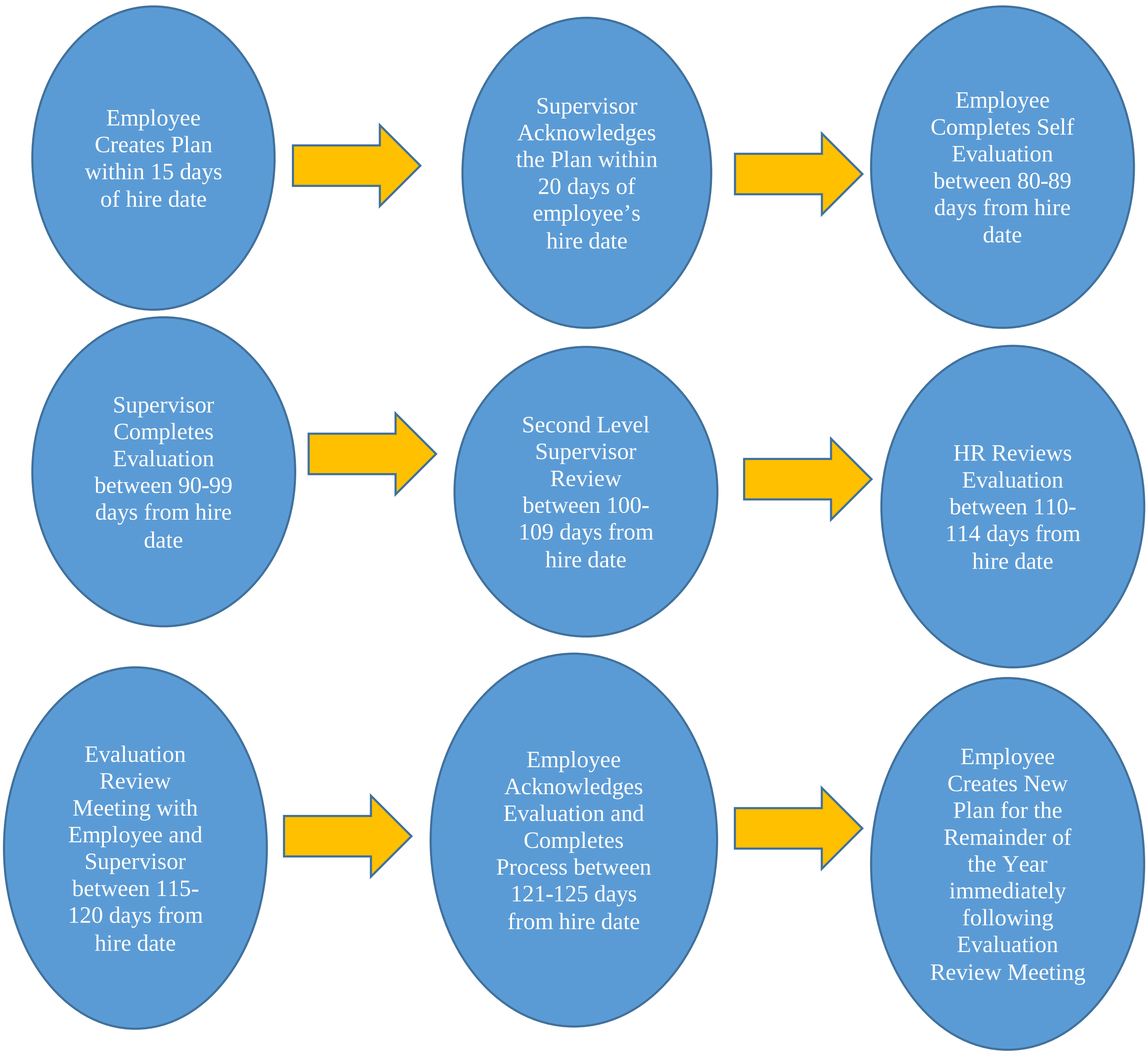
After the second level supervisor **Approves** the evaluation, Human Resources will review and **Acknowledge** the **Introductory Staff Evaluation** and submit back to the supervisor.

The supervisor will conduct the **Evaluation Review Meeting** with you between 115-120 days of your employment to discuss your progress and select **Complete**. When the meeting is complete, the employee will log back into the system and **Acknowledge** the meeting and the Introductory Staff Evaluation process is complete.

Now it's time to set goals for the remainder of the year. You will be notified via email when you have been set up in the system for the Annual evaluation program for the appropriate year. The evaluation period for non-exempt staff is April 1st through March 31st and for exempt staff the evaluation period is from May 1st through April 30th.

A feature of the system is the ability to track your progress using “Progress Notes” so instead of tracking items on paper, you can record your activities electronically. Both the employee and the supervisor can enter notes and they are private. The supervisor cannot see what the employee writes nor can the employee see what the supervisor writes. NOTE: Even though progress notes are private, make sure the content is business appropriate, as they could be discoverable if subpoenaed.

Below is a chart that explains the order in which the performance tasks will be completed for the Introductory Staff Evaluation.



Revised 3-2018