



# PERFORMANCE EVALUATION

User Manual

## Performance Management

This module makes the performance review process easy to monitor and execute. Employees and supervisors can keep track of performance throughout the evaluation period; they have the ability to add progress notes and update goals as needed. Email notifications and task assignments keep the employees and supervisors abreast of the progress and notifies whomever needs to take action at each stage in the process.

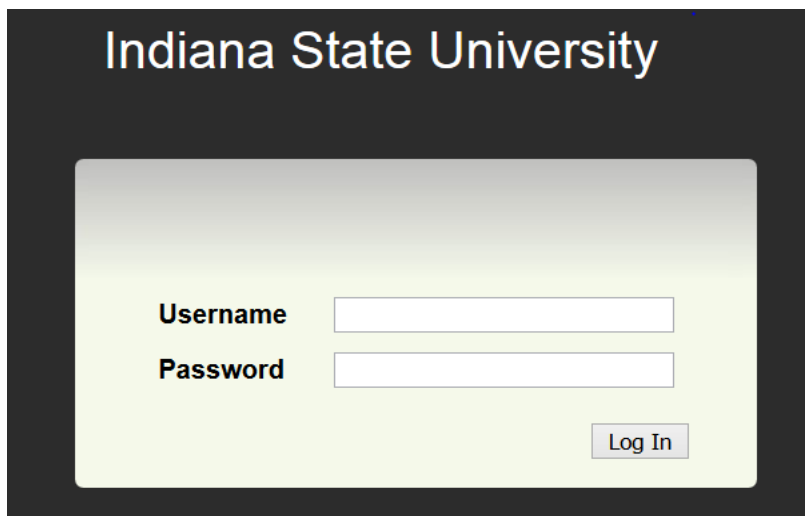
### Annual Performance Evaluation

All benefits eligible exempt non-exempt professional and non-exempt staff employees must complete an annual performance evaluation every year.

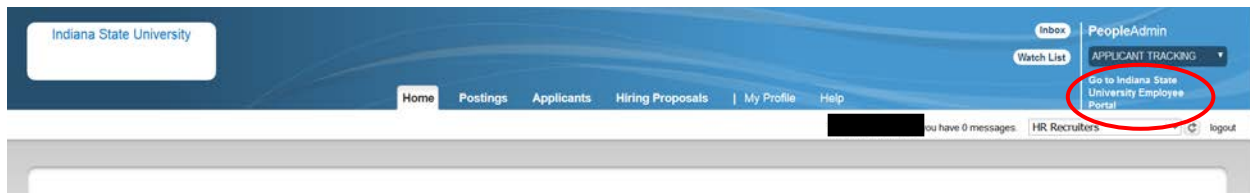
The evaluation period for non-exempt (bi-weekly) employees is April 1 through March 31. The evaluation period for exempt (monthly) and non-exempt professional (bi-weekly) employees is May 1 through April 30.

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.

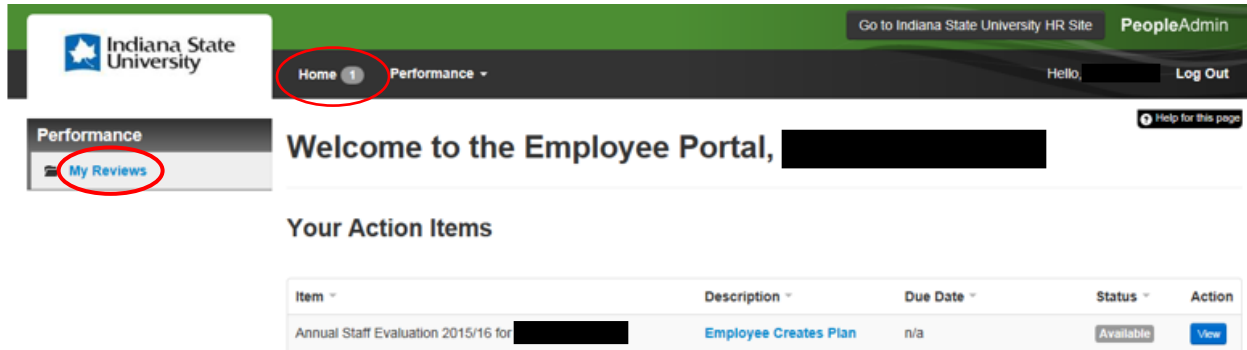
Please enter your University Username and Password.



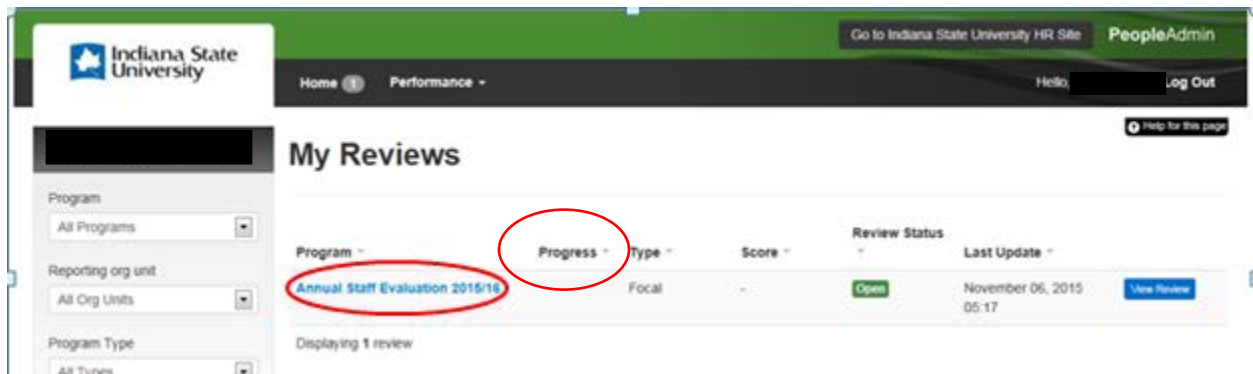
Click on **Go to Indiana State University Employee Portal** as shown below.



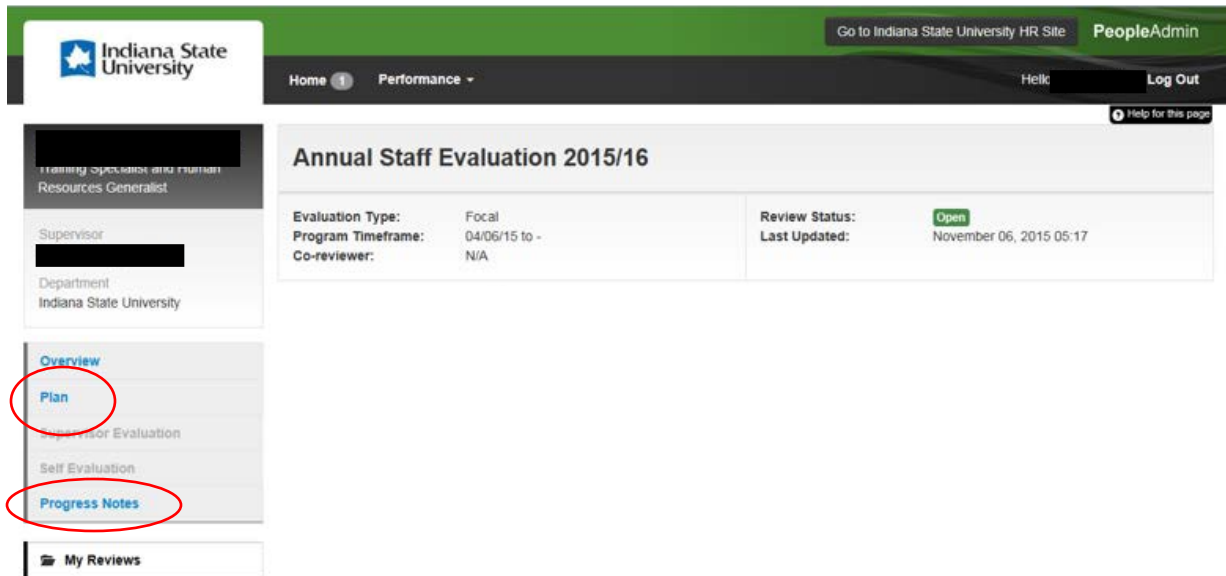
This will bring you to the following screen. You will see the **Home** tab across the top. Clicking on Home will bring you to your **Action Items** (to-do list).



\*\*If your Home tab indicates zero action items, you can click on the My Reviews link to see the progress of any open evaluations for you. The percentage of progress will tell you where your evaluation is at within the task assignments.

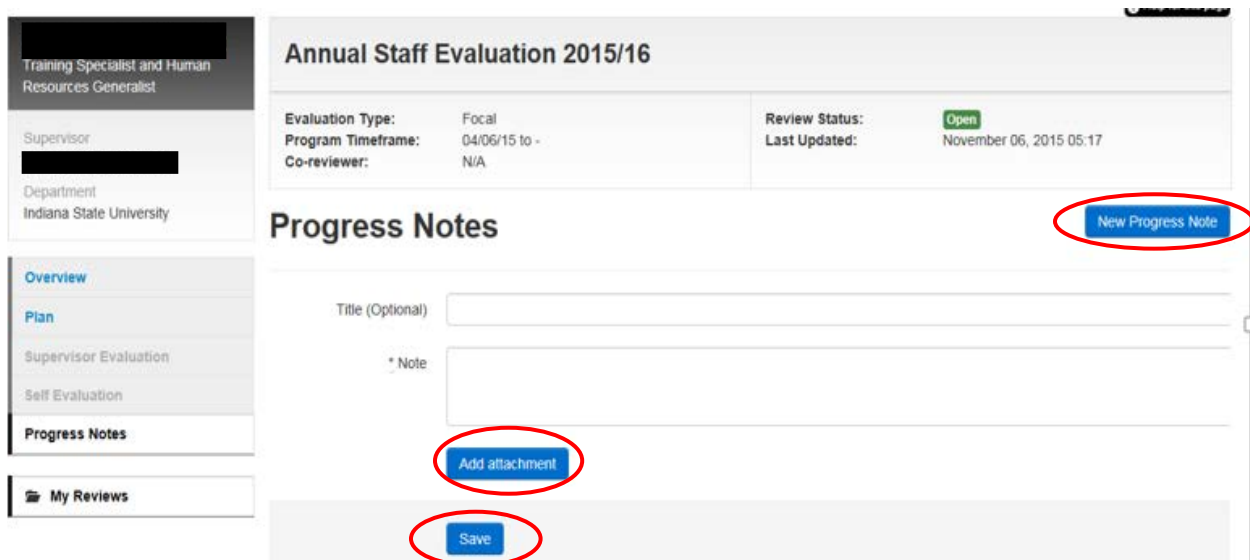


If you click on the Annual Staff Evaluation link, you will be directed to the following page with the **Plan** and **Progress Notes** icons.



The **Progress Notes** feature is available to both the supervisor and the employee which allows them to enter notes and upload documents to track their progress during the performance period. While progress notes are private, they should be business appropriate because they can be accessed if subpoenaed.

When you click on **Progress Notes** you will be directed to the following page where you can enter your information and save. To enter additional notes, click on **New Progress Note**, and save. Click on **Add Attachment** to upload a document.



## Setting Goals

You can access the Goals section by clicking on **Employee Creates Plan**. NOTE: Goals are set at the beginning of the evaluation period or within 30 days of hire/start date.

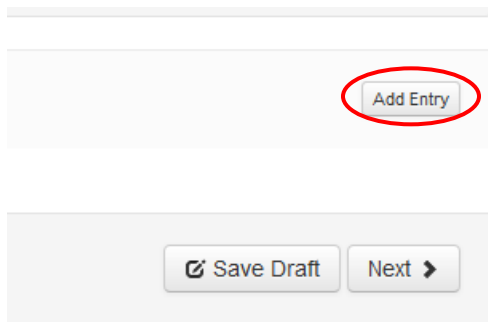
The screenshot shows the Indiana State University PeopleAdmin interface. The top navigation bar includes the university logo, 'Home', 'Performance', 'Hello', and 'Log Out'. A sidebar on the left contains 'Performance' and 'My Reviews'. The main content area displays 'Welcome to the Employee Portal, [redacted]' and 'Your Action Items' section. Below this is a table with the following data:

Item	Description	Due Date	Status	Action
Annual Staff Evaluation 2015/16 for [redacted]	<a href="#">Employee Creates Plan</a>	n/a	Available	<a href="#">View</a>

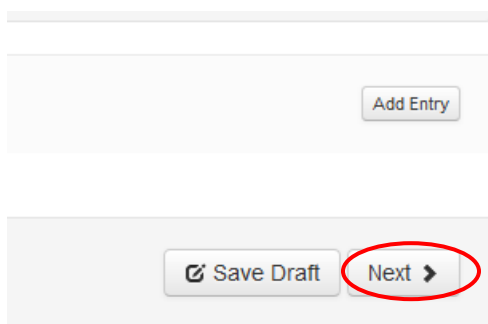
You will be directed to the Goals section where you will enter your goals.

The screenshot shows the 'Annual Staff Evaluation 2015/16' page. The left sidebar includes the user's role 'Training Specialist and Human Resources Generalist', supervisor information, department 'Indiana State University', and navigation links for 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Progress Notes', and 'My Reviews'. The main content area displays evaluation details: 'Evaluation Type: Focal', 'Program Timeframe: 04/06/15 to - N/A', 'Review Status: Open', and 'Last Updated: November 06, 2015'. Below this is the 'Plan for [redacted]' section with tabs for 'Goals' and 'Job Factors'. A note states: 'Three to six goals are recommended for each employee. However, some employees may have less than three or more than six.' The 'Goals' section contains a form with two input fields: 'Goal/Objective' and 'Achievement'.

You can enter as many goals as needed by 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 a 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 review period).



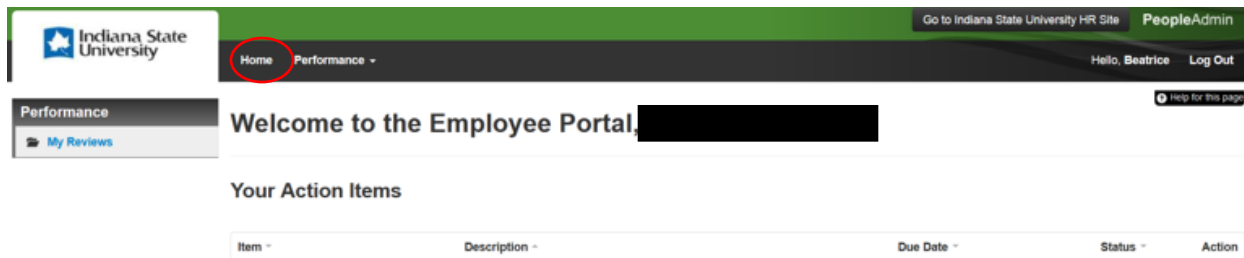
Once you have completed entering your goals and reviewing your job factors, click on the complete button. NOTE: Once you select **Complete** and your supervisor approves the goals, you cannot change or add to the goals without contacting Human Resources so they can reopen the task.

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**.

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**.

## Completing Self-Evaluation

You will be notified by email that it's time to complete the self-evaluation. Go to your **Home** tab at the top of the page.



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 at the beginning of the review period. 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**.

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 evaluation and submit back to the supervisor.

The supervisor will conduct the **Evaluation Review Meeting** with you 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.

# Performance Management Task Assignments

**\*\*Percentage of progress after task is marked complete**

## 1. Employee Creates Plan (12.5%)

Assigned at beginning of review period every year with a due date of June 30<sup>th</sup>.

Assigned to new-hires on their date of hire; must create plans within first 30 days.

## 2. Supervisor Acknowledges Plan (25%)

To be completed by July of each year or within 45 days of a new-hire start date.

## 3. Employee Self-Evaluation (37.5%)

Email notifications will be sent at the end of the review period (generally will be early April) to begin the self-evaluation for previous year. Should be completed prior to May 31 for all staff.

## 4. Supervisor Evaluation (50%)

Completed any time after employee submits their self-evaluation.

## 5. Second Level Supervisor Review (62.5%)

Completed any time after supervisor evaluation is complete.

## 6. Human Resources Review (75%)

Completed any time after the second level supervisor approval.

## 7. Evaluation Review Meeting (87.5%)

Completed after all other approvals are made. At this time, all comments and ratings are visible for supervisor and employee to discuss together. This will also



be a great time to discuss goals for the next review year as they will need to be entered.

## 8. Employee Acknowledges Evaluation (100%)

Final step in the process. The employee must log in to the PA 7.0 system and mark their evaluation as complete after they have their review meeting with supervisor.

**If a task needs re-opened for any reason or goals need added or edited, please contact Human Resources at ext. 4114. Keep in mind, this will require any proceeding tasks marked complete to be reopened as well.**