Performance Evaluation Tutorial
Enter Your Sycamore username and password (this is also referred to as your Novell login username and password).

(This is the same username and password you use when you very first login to your ISU computer or login to view your direct deposit pay stub.)

Click “Login”
If you are logged in as:

- "Current Group: Employee" continue on to page 5
- If a different group is listed (ie: "Chair/Supervisor": Select "Change User Type"
- If no Group is defined, continue to page 5
Be sure your “Employee” user type is selected.
If not select the “Employee” option, and then click on “Change Group”.

Exempt Staff
Before you begin your evaluation if you would like to view your Job description you can go to “Position Descriptions” and the click on “View My Position”

You will see your name and that you are logged in as “Employee”
When you are ready to begin your evaluation; select “Start Evaluation”.

Note:
If you are getting up from your computer and leaving your desk for more than 5 minutes, please go to “View Evaluation Summary” and select “Save” or “Save Without Submitting” then on the next page “Confirm” and log out of the system. Otherwise, you will be timed out and lose your data.
When you do go back to the evaluation, you will go to the “Active Evaluations” option. Be sure not to begin another evaluation.
Click on "Start Action" under the "Exempt Performance Evaluation" type.
You will need to type in your first and last name in the fields above
And then click on the “Search” button
Now you should be able to see your Position Title, Position Number, 991 ID Number, and your Name

Click on “Start Action”
The tab titled “Documents” is where other documents may be attached by you or your immediate supervisor.

The types of documents that can be attached are your department’s org chart and other documents that pertain to your job. Any written recognition that you have received as well.
To attach a document click on “Attach”
Click on the “Browse” button to select the document you would like to attach.

Note: the documents must be no larger than 1.9 mb.
Select the location on your computer where the file you would like to attach is located.

Once you locate the file, select it and it will appear in the area titled File name.

After you have selected the file, either double click, or click on “Open”.
After you have selected the file you are attaching, click on the “Confirm” button.
If you have attached documents they will be listed in this area, and you can view them by clicking on “View/Edit”.

Note:
If you are getting up from your computer and leaving your desk for more than 5 minutes, please go to “Preview Evaluation” and select “Save” or “Save Without Submitting”, “Continue”, then on the next page “Confirm” and log out of the system. Otherwise, you will be timed out and lose your data.

When you do go back to the evaluation, you will go to the “Active Evaluations” option. Be sure not to begin another evaluation.
The ISU Mission & Vision statement is available for your review.

Please click here to view Indiana State’s Mission Statement.

Please enter the following information:
- Job Title: HRIS Analyst
- Employee ID: 991080312
- Employee First Name: Kimberly
- Employee Last Name: Smith
- Supervision: No Response

Note: Fields marked by an asterisk, are required, you must enter information in these fields.

Select your name in the employee drop down box.
Confirm that the Other Users who will be reviewing/editing your evaluation are selected, this would include, your immediate supervisor, your 2nd level supervisor, chair, dept. head, V.P., etc to the “Selected” area.

Select the appropriate Evaluation type

Select Evaluation Begin Date & End Date, for the time period of your evaluation.

Note: Please use the Evaluation Begin Date of May 1 of the previous year and the Evaluation End Date of April 30th of the current year.

Note: “Return to Previous” is available for you throughout the system, if you need to return to a section you have already completed (do not use your browser back button).
After the selections have been made:
Click on “Continue To Next Page”
To complete this section:

This is the section you completed last year with the goals that you accomplished during this last year. You may or may not have entries for this section depending on your position and if you transferred into a different job.

If you do have entries here;

Select “Edit” to begin entering your achievements for last years Goals/Objectives. You and your immediate supervisor are able to add entries.

If you are not completing this tab, select “Continue to Next Page”.

<table>
<thead>
<tr>
<th>Goal/Objective</th>
<th>Achievement</th>
<th>Projected Completion Date:</th>
<th>Actual Completion Date:</th>
<th>Supervisor’s Comments for Goal/Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal #1</td>
<td></td>
<td>07/01/2010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goal #2</td>
<td></td>
<td>07/01/2010</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Note:
Fields marked by an asterisk, are required, you must enter information in these fields

If you choose to complete this section;
The “Goal/Objective” field is required

Note: The maximum number of words allowed in the Goals/Objective and Achievement fields is 500 (per field)

Once you have completed this section, click “Add Entry”, or “Save Changes”.

Exempt Staff
You will see the achievements you added here, when finished editing your Goals/Objectives click on “Continue To Next Page”

Note:
If you are getting up from your computer and leaving your desk for more than 5 minutes, please go to “View Evaluation Summary” and select “Save” or “Save Without Submitting” then on the next page “Confirm” and log out of the system. Otherwise, you will be timed out and lose your data.
When you do go back to the evaluation, you will go to the “Active Evaluations” option. Be sure not to begin another evaluation.
This is your Job Factors page, where you will select a Job Rating for each Job Factor. Definitions of the ratings are available for you to reference for each of the following categories.

If a Job Factor does not pertain to your job, select Not Applicable and the factor will not be included in your overall rating.

Please note that if you give yourself a rating of: Outstanding Performance, Needs Improvement or Unsatisfactory Performance, you must include comments in the “Employee Comments” field.

Note: The maximum number of words allowed in the Comments field is 500

The Job Factors are:
- Adaptability
- Attendance and Dependability
- Communication
- Customer Service Focus
- Decision Making
- Ethics and Integrity
- Initiative
- Interpersonal Skills
- Job Knowledge
- Interpersonal Skills
- Planning and Organizing Effectiveness
- Teamwork
- University Resources & Risk Management
- Work Quality/Quantity
- Supervisor/Management Skills (Only if you supervise staff employees)
- Leadership

Exempt Staff
Once you have completed your Job Factor Ratings and comments, select “Continue To Next Page”. Or any other options available to you.

Note: All fields must be filled in before moving forward or returning to a previous page.

Note:
If you are getting up from your computer and leaving your desk for more than 5 minutes, please go to “View Evaluation Summary” and select “Save” or “Save Without Submitting” then on the next page “Confirm” and log out of the system. Otherwise, you will be timed out and lose your data. When you do go back to the evaluation, you will go to the “Active Evaluations” option. Be sure not to begin another evaluation.
The tab “New Degrees and Certifications” is a new addition to the evaluation process.

The “New Degrees and Certifications” tab provides a place to add degree or certification information that has been completed within the current evaluation time period.

In addition to the degree and/or certification, be sure to include the date that the degree was completed and/or the date that the certification was completed and/or became active.

Please include any certification expiration or renewal date also.
Enter your Future Goals, Objectives and Plan, this is the same format that was used for the Current Goals, Objectives and Plan.

Suggested number of Goals, Objectives and Plans is 3-6

To begin, click on “Add New Entry”. 
The "Goal/Objective" field is required. You must enter a Goal/Objective.

Note:
Fields marked by an asterisk are required, you must enter information in these fields.

Once you have completed this section, click "Add Entry".
You will see the goal(s) you added here, when finished adding your Goals/Objectives. Click on "Continue To Next Page"
On the Rating Worksheet;
The “Employee Comments” field is available for you to provide any additional information specific to your evaluation.

Note: The maximum number of words allowed in the Comments field is 500

After your supervisor has completed their portion of the evaluation, you will be able to view your Overall Score, Overall Performance Rating, the Conference Date and your Supervisor’s Comments.

When you have completed this page, click on “Continue to Next Page”.

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### Employee Comments

<table>
<thead>
<tr>
<th>Employee Comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Chair/Supervisor Comments

<table>
<thead>
<tr>
<th>Overall Score:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Overall Performance Rating:</td>
</tr>
<tr>
<td>Conference Date:</td>
</tr>
<tr>
<td>Chair/Supervisor Comments:</td>
</tr>
</tbody>
</table>

### Dean/Administrator Comments

<table>
<thead>
<tr>
<th>Dean/Administrator Comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

*Required information is denoted with an asterisk.*
### History

<table>
<thead>
<tr>
<th>Date</th>
<th>Modified By</th>
</tr>
</thead>
<tbody>
<tr>
<td>02-29-2012 1:26 PM</td>
<td>Kimberly Smith</td>
</tr>
</tbody>
</table>

*New - Non-Exempt Performance Evaluation*

[Continue to next page]

Completing this section is not necessary.
Exempt Staff

Review your entire evaluation. This page is a summary of all the information you have entered.

After verifying your information, you may select from the following actions:
- **Save** – If additional time is needed to complete your Evaluation later, (you can logout and log back in again).
- **Submit to First Level Supervisor/Hiring Manager**.
- Once you make your selection, click on “Continue”.

Note:
If you are getting up from your computer and leaving your desk for more than 5 minutes, please go to “View Evaluation Summary” and select “Save” or “Save Without Submitting” then on the next page “Confirm” and log out of the system. Otherwise, you will be timed out and lose your data.

When you do go back to the evaluation, you will go to the “Active Evaluations” option. Be sure not to begin another evaluation.

Review your entire evaluation. This page is a summary of all the information you have entered.
Exempt Staff
A green check mark should appear indicating that your evaluation has been successfully submitted.

Congratulations!
You have completed your online Performance Evaluation.
You can now Logout of the Evaluation process.