

Complete Self Evaluation for Performance Review

USER GUIDE

When it is time to complete the Performance Review, the HR Director will initiate the evaluations and open the review period. The Performance Appraisal periods are:

Mid Year: January 1-May 31

Year End: December 1- November 30

First, the employee will complete the self evaluation.. Then managers will complete the manager review and schedule a meeting to discuss together. After the meeting, employees must acknowledge the review. Employees have an opportunity to make official comments after the manager review. **Note that the process will move forward regardless of whether the employee completed the self-appraisal.*

COMPLETE SELF EVALUATION

1. From the **Homepage**, click the **Inbox**.
2. Locate and click the **Start Evaluation: Employee Performance Appraisal**
3. Click **Get Started**
4. There are 6 steps in completing the appraisal. You can click Save for Later at any point.



Evaluation Of Performance Based On Employee Contribution To Core Values

1. Review the **Core Values** listed:
 - Shared Purpose
 - Integrity
 - Quality
 - Diversity
 - Service
 - Stewardship of Our Resources
2. In the **Employee Summary** area, select the overall **Rating** and enter in **Comments**. This can be anything you accomplished during the evaluation period. IE. Trainings, accreditations, tasks you excelled at, etc.

Employee Summary

Rating

Comment

3. Once done, click **Next**.

Evaluation of Performance based on Job Deliverables

1. In this section, identify the most important job deliverables: essential job duties and competencies needed for your position. Click the **Add** button to start and to add more.

2. **Job Function, Rating and Comment** are all required.

Job Function Take incentive to seek better processes for efficiency and improved productivity.

Employee

Rating

Comment Saw a problem with our system and worked with our vendor to streamline the process and workflow.

3. Once done, click **Next**.

Professional Development Plan (PDP)

1. In this section, we want to know “where you are” and “where you want to be in the future”. Build a comprehensive picture of your current skills, knowledge, and abilities.
 - Examine your professional goals and career plans.
 - Identify your learning needs.
 - Develop a plan to cover the gap between your existing strengths and those needed to reach your career goals.
2. Enter in your **Rating** and **Response**.
3. Click **Next**.

Employee

Rating

Response

Note: Throughout the review, the ratings will stay the same. Click from the drop-down box the rating for that section.

- Exceptional (E)
- Highly Successful (H)
- Successful (S)
- Needs Improvement (N)

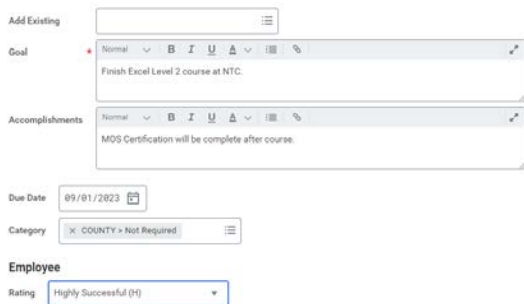
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SMART Goals

1. In this section, A SMART goal may include all areas of performance appraisal: core values, job deliverables and/or professional development. Creating SMART goals helps the employee and supervisor clearly understand what is expected from the employee to ensure that they are properly evaluated.

Specific
Measurable
Attainable
Relevant
Time Oriented



The screenshot shows a form with the following fields:

- Add Existing:** A search bar.
- Goal:** A text area containing "Finish Excel Level 2 course at NTC."
- Accomplishments:** A text area containing "MOS Certification will be complete after course."
- Due Date:** A date picker set to 09/01/2023.
- Category:** A dropdown menu set to "COUNTY - Not Required".
- Employee:** A dropdown menu.
- Rating:** A dropdown menu set to "Highly Successful (H)".

2. If there is an existing goal already put in place, you can search for it in **Add Existing**. If there is not any, go to next section- **Goal**.
3. Not required fields, but the more information the better: **Accomplishments**, **Due Date** and **Category**.
4. In the Employee section, choose a **Rating**.
5. To add additional goals, click **Add**.
6. Once complete, click **Next**.

Overall Performance Rating

1. In this section, the ratings you marked for yourself will be calculated and averaged. **You can change this by marking the box Override Calculate Rating and change the rating from the drop down.*



The screenshot shows the "Overall Performance Rating" section with:

- Employee:** A dropdown menu.
- Rating:** A dropdown menu set to "Highly Successful (H)".
- Override Calculate Rating:** A checkbox that is currently unchecked.
- Rating Description:** A text area with a small font description of the rating.

2. Enter in any additional **Comments**.
3. Once completed, hit **Next**.

Review and Submit

1. Before being submitted to your Manager, review your evaluation. You can make **edits** to any section by **clicking on the left** to get back into the evaluation.



2. Once you have reviewed and are ready to send off to your Manager, click **Submit**.
3. You will get a notice that says "Success! Event Submitted. This will say Up Next: Manager to Review."
4. Once your Manager has reviewed and completed their portion, a meeting will be scheduled to go over the evaluations.
5. You will receive an additional task to provide employee review comments and will need to Acknowledge and Agree or Acknowledge and Disagree the review.

Performance Appraisal Documentation

1. You can look at your review and print off. From your home profile, click on **Performance**. And in the top bar, click **Performance Reviews**.

