

Complete Manager Evaluation for Performance Review- Sheriff 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 MANAGER EVALUATION

There will be an inbox task once the employee has completed the self- evaluation or after the process has moved forward. You will see what the employee has entered for ratings and comments.

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



Evaluation Of Employee Behaviors Relative To County Core Values

1. Review the **Core Values** listed:
 - Duty
 - Integrity
 - Respect
 - Teamwork
 - Safety
2. In the **Manager Summary** area, enter in an overall **Rating** and **Comments**. This can be anything you saw the employee exhibit during the evaluation period. IE. Came up with a better process. Helping fellow coworkers, etc.
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 the employee’s position. Click the **Add** button to enter more.
2. **Job Function, Rating and Comment** are all required.

The screenshot shows a form with three main sections:

- Job Function:** A text area containing "Taking initiative and Teamwork".
- Manager Rating:** A dropdown menu set to "Highly Successful (H)".
- Comment:** A text area containing "Takes on new tasks without hesitation and always willing to train others".


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

Professional Development Plan (PDP)

1. In this section, you as the manager need to make the assessment of where the employee is and where you see them in the future.
 - Takes the initiative to seek and apply learning.
 - Accepts feedback from customers, co-workers and supervisors and considers this information for improving job performance.
2. Enter in your **Rating** and **Response**.
3. Click **Next**.

The screenshot shows a form with two main sections:

- Manager Rating:** A dropdown menu with "select one" selected.
- Response:** A text area with a rich text editor toolbar.



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

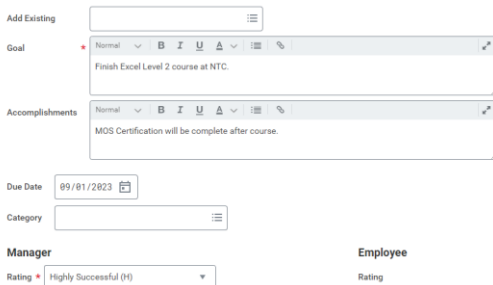
- Exceptional (E)
- Highly Successful (H)
- Successful (S)
- Needs Improvement (N)

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SMART Goals

- 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 for adding SMART goals. It includes fields for 'Add Existing', 'Goal' (with a rich text editor containing 'Finish Excel Level 2 course at NTC'), 'Accomplishments' (with a rich text editor containing 'MOS Certification will be complete after course'), 'Due Date' (set to 09/01/2023), 'Category', and 'Manager' (with a dropdown menu). There are also 'Rating' dropdowns for both Manager and Employee.

- In **Goals**- these may be prefilled. Review them if they are listed. Add any additional Goals by clicking Add.
- Not required fields, but the more information the better: **Accomplishments, Due Date** and **Category**.
- In the Manager section, choose a **Rating**.
- To add additional goals, click **Add**.
- Once complete, click **Next**.

Overall Performance Rating

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



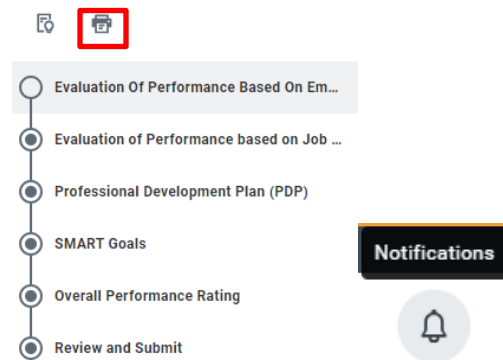
The screenshot shows the 'Overall Performance Rating' section. It includes a 'Manager' section with a 'Default Rating' dropdown set to 'Highly Successful (H)' and a 'Rating' dropdown also set to 'Highly Successful (H)'. There is an 'Override Calculated Rating' checkbox which is unchecked. Below is a 'Rating Description' field with text: 'The employee's performance consistently meets and generally exceeds expectations and role requirements by producing a high-quality of work on a consistent basis.'

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

Review and Submit

- Review your evaluation of the employee. You can make **edits** to any section by **clicking on the left** to get back into the evaluation. *If your department requires additional review/approval before finalizing*, you can print the full review. After hitting print, you will find this report in your Notifications.

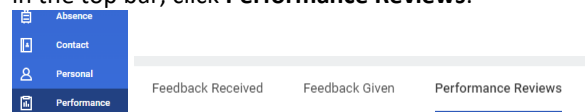
Hit Save for Later, do not hit submit until after the meeting with the employee has happened. This review will remain in your inbox until after that meeting has occurred.



- The employee then gets the task to provide employee review comments and Acknowledge and Agree or Acknowledge and Disagree.
- You will then receive the final task to review those additional comments. You will need to mark the status as **Reviewed by Manager** and add in any last comments.

Performance Appraisal Documentation

- An employee and manager can look at the review and print off. From their profile, click on **Performance**. And in the top bar, click **Performance Reviews**.



The screenshot shows a navigation menu with 'Absence', 'Contact', 'Personal', and 'Performance'. Below the menu is a table with columns: 'Feedback Received', 'Feedback Given', and 'Performance Reviews'.

Note: Once hitting submit, you cannot make changes to the review without involvement from the HR Director. Further questions, reach out to the HR Director at hr@co.marathon.wi.us