# Supervisor Performance Evaluation Instructions

To begin a new performance evaluation for your employee log in to the HR System at https://jobs.shepherd.edu/hr. Select "Supervisor" as your user type.

Click on "Begin New Performance Evaluation" on the left hand navigation bar. The following screen will appear. Click on the "Start Action" link under "Performance Evaluation".





You may enter the employee's name and click on "Search", or just click on "Search" for a list of employees.

- ➢ Please remember that all information entered will be seen by the employee, supervisor and everyone in positions above the employee's position on your organizational chart.

- ➢ Once you have started an evaluation online, the system will log you out after 60 minutes of inactivity, and any information you have entered will be lost. To avoid that, periodically (and definitely before you leave the task for any period of time) save the information. To save your work, click on the "Preview Evaluation" button at the bottom of the screen. Select the status of "Save without Submit" or "Save". Click on "Continue" and then "Confirm". When you are ready to resume your work with the evaluation, click on "Active Evaluations" from the left hand navigation bar.

Click on the "Start Action" link under the job title of the employee you wish to evaluate and a screen similar to the one on the following page will appear.

## Shepherd
UNIVERSITY

Applicant Tracking, Position Description, and Performance Management System

**POSTINGS**
ACTIVE POSTINGS
PENDING POSTINGS
HISTORICAL POSTINGS
SEARCH HIRING
PROPOSALS
**CREATE POSTING**
FROM POSITION
**POSITION DESCRIPTIONS**
BEGIN NEW ACTION
SEARCH ACTIONS
PENDING ACTIONS
SEARCH POSITIONS
**EVALUATIONS**
BEGIN NEW PERFORMANCE
EVALUATION
ACTIVE EVALUATIONS
HISTORICAL EVALUATIONS
**ADMIN**
HOME
CHANGE PASSWORD
CHANGE USER TYPE
LOGOUT

SHEPHERD UNIVERSITY
• OFFICE OF HUMAN
RESOURCES
• CLASSIFIED STAFF
SALARY SCHEDULE
INSTRUCTIONS FOR
PERFORMING ACTIONS
USING THE ONLINE HR
SYSTEM

• Welcome **LuAnn Yanna**. You are logged in.
Your Current User Type:Supervisor.

Monday, March 15, 2010

### Create Performance Evaluation

| Evaluation Details | Job Duties | Standard Evaluation Competencies | Employee Self-Evaluation | Prior Goals Set by Supervisor | Prior Goals Set by Employee | Future Goals Set by Supervisor | Future Goals Set by Employee | Overall Rating Comments | Performance Improvement Plan | Supervisor Attach Documents | Notes/History |

**CONTINUE TO NEXT PAGE >>**

*Required information is denoted with an asterisk.

| | |
|---|---|
| Employee First Name: | Lisa |
| Employee Last Name: | Doe |
| Job Title: | ADMIN SEC |
| * Evaluation Cycle: | No Response |
| Evaluation Cycle Begin Date: | MM/DD/YYYY -or- MM-DD-YYYY |
| Evaluation Cycle End Date: | MM/DD/YYYY -or- MM-DD-YYYY |
| * Department: | |
| Other Users in Department Who Need Access to this Evaluation: | Not Selected: No Response    Selected: Yanna, LuAnn   [ > ] [ < ] [ >> ] [ << ] |
| Employee: | No Response |

*Required information is denoted with an asterisk.

**CONTINUE TO NEXT PAGE >>**

[ CANCEL ]    [ PREVIEW EVALUATION ]

Use the drop-down box to select the correct Evaluation Cycle.
Choices are:
Annual
3 Month Probationary
6 Month Probationary
Discretionary

Enter the evaluation cycle begin and end dates. For annual evaluations, the dates would typically be July 1, 20__ to June 30, 20__.

Check to be sure the users selected are only those who need access to the evaluation. Normally this would only need to be the supervisor. You may add or subtract users from the "Selected" box using arrows between the two boxes.

**At this point, if the employee is required to complete a self-evaluation, click on the "Preview Evaluation" button at the bottom of the page and a screen similar to the one below will appear.**
(Please skip this step if a self-evaluation is not required.)



To submit the evaluation to the employee so that they can complete the self-evaluation and enter their goals, change the Evaluation Status to "Submit Evaluation to Employee". Then click on "Continue" and then "Confirm".

The employee will receive a system-generated email to notify them that a performance evaluation has been submitted to them. They will log in to the system to complete the self-evaluation and enter employee goals. The employee will then submit the action back to the supervisor. At that time, the supervisor will continue on with the evaluation process as described on the following pages.

**If a self-evaluation is not required, or if the self-evaluation has been completed, you should continue with your evaluation of the employee by clicking on "Edit" then "Continue to Next Page".  You will be on the Job Duties tab.**

The screen that will appear contains the job duties as listed in the PIQ.



To move to the "Standard Evaluation Competencies" tab, click on "Continue to Next Page".

Please follow the instructions at the top of the screen to complete the Standard Evaluation Competencies section.

**Shepherd** UNIVERSITY

Applicant Tracking, Position Description, and Performance Management System

• Welcome **LuAnn Yanna**. You are logged in.
Your Current User Type:Supervisor.

Thursday, September 8, 2011

## Create Performance Evaluation

| Evaluation Details | Job Duties | **Standard Evaluation Competencies** | Employee Self-Evaluation | Prior Goals Set by Supervisor | Prior Goals Set by Employee | Future Goals Set by Supervisor | Future Goals Set by Employee | Overall Rating Comments | Performance Improvement Plan | Supervisor Attach Documents | History |

[ << RETURN TO PREVIOUS ]     [ CONTINUE TO NEXT PAGE >> ]

Supervisors are to evaluate on an annual basis all classified and non-classified employees under their supervision using this Staff Performance Evaluation format.

Supervisors, please rate employees on each item, provide summary comments at the end. You may include comments for each item but they are not required.

Supervisors must review the completed performance evaluation with each employee. At that time, the employee must be given the opportunity to respond in writing, although employees are not required to comment if they do not want to.

For employees who receive any ratings below Meets Requirements, an Improvement Plan must be entered on the Performance Improvement Plan tab.

The evaluation process is not complete until the supervisor and employee have completed the online evaluation, met face to face to discuss the evaluation, and the supervisor has changed the status of the evaluation to "Submit Evaluation to HR.

Please refer to Shepherd University Board of Governor's Policy 26 (Salary Policy) for further guidance.

*Required information is denoted with an asterisk.

**Quality of Work (Excellence)**

Rating: ○ Unacceptable Performance  ○ Needs Improvement  ○ Meets Requirements  ○ Fully Meets and Sometimes Exceeds Requirements  ○ Consistently Exceeds Requirements  ⦿ No Response

Comments:

**Quantity of Work (Productivity)**

Rating: ○ Unacceptable Performance  ○ Needs Improvement  ○ Meets Requirements  ○ Fully Meets and Sometimes Exceeds Requirements  ○ Consistently Exceeds Requirements  ⦿ No Response

Comments:

**Knowledge of Job (Proficiency)**

Rating: ○ Unacceptable Performance  ○ Needs Improvement  ○ Meets Requirements  ○ Fully Meets and Sometimes Exceeds Requirements  ○ Consistently Exceeds Requirements  ⦿ No Response

Comments:

**Attendance and Punctuality**

Rating: ○ Unacceptable Performance  ○ Needs Improvement  ○ Meets Requirements  ○ Fully Meets and Sometimes Exceeds Requirements  ○ Consistently Exceeds Requirements  ⦿ No Response

Comments:

**Working Relationships (Civility and Cooperation)**

Rating: ○ Unacceptable Performance  ○ Needs Improvement  ○ Meets Requirements  ○ Fully Meets and Sometimes Exceeds Requirements  ○ Consistently Exceeds Requirements  ⦿ No Response

Comments:

**Customer Service (Students, Colleagues, etc.)**

Rating: ○ Unacceptable Performance  ○ Needs Improvement  ○ Meets Requirements  ○ Fully Meets and Sometimes Exceeds Requirements  ○ Consistently Exceeds Requirements  ⦿ No Response

Comments:

After you have completed the Standard Evaluation Competencies tab, click on "Continue to Next Page".

The next tab is the "Employee Self-Evaluation". This is where the employee will have entered their self-evaluation, if it was required. The supervisor is able to view the information but cannot edit this tab.

To move to the "Prior Goals Set By Supervisor" and/or "Prior Goals Set By Employee" tabs, click on "Continue to Next Page". Goals that were entered during the most recent prior evaluation will appear on those tabs.

To comment on whether the prior goals set by the employee and/or the supervisor were met, click on the "Prior Goals-Result Comments" tab.

To move to the "Future Goals Set By Supervisor" tab, click on, "Continue to Next Page".

This is where new goals that the supervisor wants to set for the employee will be entered. To add a new entry, click on "Add New Entry".



Type the goal into the text block. When you are finished, click on "Add Entry".

The entry will be viewable on the following page just as it appears on the screen. Follow the same procedure to add more entries. Entries can be edited or deleted if necessary.



When you are done adding goals, click on "Continue to Next Page".

The next tab is "Future Goals Set By Employee". This is where the employee will have entered their goals, if a self-evaluation was required. The supervisor is able to view the information but cannot edit this tab.

To move to the "Overall Rating Comments" tab, click on "Continue to Next Page".

Enter an Overall Performance Rating and add supervisor comments.

To move to the "Performance Improvement Plan" tab, click on "Continue to Next Page".

This tab is where you will enter a Performance Improvement Plan, if necessary.

To move to the "Supervisor Attach Documents" tab, click on "Continue to Next Page".

This tab is where you can attach documents if desired. An example of documents that could be attached are certificates of completion for training programs. To attach documents, click on the "Attach" link.



On the screen shown below you can either upload a document or paste a document. Follow the prompts on the screen to finish attaching the document.

Click on "Continue to Next Page".

This screen will show the history and notes of the evaluation.



To view the Performance Evaluation Summary, click on "Continue to Next Page".

# Shepherd
UNIVERSITY

Applicant Tracking, Position Description, and Performance Management System

• Welcome **LuAnn Yanna**. You are logged in.
Your Current User Type: Supervisor.                    Thursday, September 8, 2011

## View Performance Evaluation Summary

Please review the details of the evaluation carefully before continuing.

To take the action you have specified, click the **Continue** button. To edit the evaluation, click the **Edit** link. To exit the evaluation without making any changes, click the **Cancel** button.

**Click on "Edit" to enter information**

Edit                                          🖶 Printer-Friendly Version

### Evaluation Status

◉ Save without Submit
○ Submit Evaluation to Employee

[ CANCEL ]   [ CONTINUE ]

### Evaluation Details

| | |
|---|---|
| Employee First Name: | Lisa |
| Employee Last Name: | Doe |
| Job Title: | ADMIN SEC |
| Evaluation Cycle: | 3 month Probationary |
| Evaluation Cycle Begin Date: | 12/01/2009 |
| Evaluation Cycle End Date: | 03/01/2010 |
| Department: | Human Resources |
| Other Users in Department Who Need Access to this Evaluation: | Yanna, LuAnn |
| Employee: | Doe, Lisa |

### Job Duties

**2 Records**

**Description of job responsibility/duty**

Arrive at work each day ready to use your skills and abilities to meet our mission of service.
Successfully complete assigned tasks.

### Standard Evaluation Competencies

**Quality of Work (Excellence)**

| | |
|---|---|
| Rating: | Fully Meets and Sometimes Exceeds Requirements |
| Comments: | Comments entered by supervisor |

**Quantity of Work (Productivity)**

| | |
|---|---|
| Rating: | Fully Meets and Sometimes Exceeds Requirements |
| Comments: | Comments entered by supervisor |

**Knowledge of Job (Proficiency)**

| | |
|---|---|
| Rating: | Meets Requirements |
| Comments: | Comments entered by supervisor |

**Attendance and Punctuality**

| | |
|---|---|
| Rating: | Consistently Exceeds Requirements |
| Comments: | Comments entered by supervisor |

**Working Relationships (Civility and Cooperation)**

| | |
|---|---|
| Rating: | Consistently Exceeds Requirements |
| Comments: | Comments entered by supervisor |

**Customer Service (Students, Colleagues, etc.)**

| | |
|---|---|
| Rating: | Fully Meets and Sometimes Exceeds Requirements |
| Comments: | Comments entered by supervisor |

**Initiative and Decision Making**

| | |
|---|---|
| Rating: | Fully Meets and Sometimes Exceeds Requirements |
| Comments: | Comments entered by supervisor |

**Leadership (Supervision, Management)**

| | |
|---|---|
| Rating: | No Response |
| Comments: | |

### Employee Self-Evaluation

**Quality of Work (Excellence)**

| | |
|---|---|
| Rating: | |
| Comments: | |

**Quantity of Work (Productivity)**

| | |
|---|---|
| Rating: | |
| Comments: | |

**Knowledge of Job (Proficiency)**

Rating:

Comments:

**Attendance and Punctuality**

Rating:

Comments:

**Working Relationships (Civility and Cooperation)**

Rating:

Comments:

**Customer Service (Students, Colleagues, etc.)**

Rating:

Comments:

**Initiative and Decision Making**

Rating:

Comments:

**Leadership (Supervision, Management)**

Rating:

Comments:

**Prior Goals Set by Supervisor**

No Records Found

**Prior Goals Set by Employee**

No Records Found

**Future Goals Set by Supervisor**

1 Record

**Goal**

Goals entered by supervisor on 3 month evaluation.

**Future Goals Set by Employee**

No Records Found

**Overall Rating Comments**

**Overall Performance Rating**

Rating: | Fully Meets and Sometimes Exceeds Requirements

**Comments**

| Supervisor Comments: | Overall comments entered by supervisor. |
| Employee Comments: | |
| Department Head / Approver Comments: | |
| HR Comments: | |

**Performance Improvement Plan**

| Performance Deficiencies: | This is where supervisor would enter Performance Deficiencies if necessary. |
| Improvement Plan: | This is where supervisor would enter Improvement Plan if necessary. |
| Employee's Comments: | |

**History**

| 09-08-2011 3:43 PM | LuAnn Yanna |
| New | |

View Summary

Edit                                          🖶 Printer-Friendly Version

**Evaluation Status**

⦿ Save without Submit
◯ Submit Evaluation to Employee

CANCEL    CONTINUE

To move the evaluation forward to the employee, change the Evaluation Status to "Submit Evaluation to Employee", click on "Continue" and then "Confirm".

At this point, the employee will receive a system-generated email to notify them that a performance evaluation has been submitted to them.  They will log in to the system to view your evaluation of them.  They will be able to complete the self-evaluation, if desired, add employee goals, and enter their comments on the Overall Rating Tab.

After the employee has completed their portion of the evaluation they will submit the action back to you, and you will receive a system-generated email telling you that it has been submitted to you.  When you log on you will be able to view the entire evaluation (your entries and the employee's entries).

After you and the employee have met face to face to review the performance evaluation, change the evaluation status to "Submit Evaluation to HR", click on "Continue" and then "Confirm".

If you and/or the employee would like a paper copy of the performance evaluation for your files, you and/or the employee can click on "Printer-Friendly Version" or "View Summary" and print it from there.  If the evaluation has been completed online you do not need to send a printed copy to the Human Resources Office.