Your **PATHways** to success starts here!

**Performance Management Process Roadmap**

to **PLAN - COACH - EVALUATE - REWARD**

| June-Oct | **POSITION DESCRIPTION*** - Supervisor starts the Review Position Description action within the Position Management module and sends it to employee for acknowledgement. If the Position Description requires changes, supervisor performs the Update Position Description action instead. **NOTE:** The job duties on the position description will be evaluated during the performance evaluation. |
| June-Oct | **PLAN*** - Supervisor and employee establish performance goals and meet to discuss performance and behavioral expectations. Supervisor submits Plan for employee acknowledgement. **NOTE:** The supervisor must select **Performance Management Process 2015-2016** in PATH before creating the Plan. For behavioral competency definitions, examples, training and coaching suggestions, refer to: EODinfo.tamu.edu/programs/competency/behavioral-competencies |
| All Year | **PROGRESS NOTES** - Supervisor and employee can enter personal Progress Notes at any time to track performance. They meet periodically to review progress and make adjustments to the Plan as needed. **NOTE:** Progress notes are not part of the personnel file, though they can be subject to open records requests. |
| April-May | **SELF ASSESSMENT** - Employee reviews yearly accomplishments and completes a Self Assessment. **NOTE:** Employee should ask supervisor if this step is required. |
| April-May | **SUPERVISOR EVALUATION*** - Supervisor creates Performance Evaluation, referring to progress notes, self-assessment and/or other sources of information gathered throughout the year. Supervisor meets with employee to discuss evaluation ratings and provide feedback about strengths and areas for improvement. Supervisor submits Evaluation to employee. **NOTE:** Supervisor must enter Overall Rating, and may make comments and attach files before submitting evaluation. |
| By May 31 | **APPROVALS/ACKNOWLEDGEMENTS*** - Employee Acknowledges the Evaluation. Upon receipt, supervisor reads comments, takes appropriate action, and completes the process in PATH. **NOTE:** Employee may add comments before acknowledging evaluation. Congratulations! The Performance Management cycle for the review period is complete. It is now time to begin Planning for the next performance review year. |

*REQUIRED STEP

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The **PCER** (Plan, Coach, Evaluate, and Reward) model is used to facilitate the performance management process. This process is intended to create an ongoing dialogue between the supervisor and employee throughout the year. After the **position description** is reviewed and acknowledged, the supervisor creates the performance plan and discusses it with the employee, which helps to establish mutual understanding of performance and behavioral expectations. During the evaluation process, the supervisor may rely on multiple sources, such as **progress notes** added during the year, employee self assessment, accolades and customer feedback to assess the employee’s performance. At the end of the review period, the supervisor meets with the employee to discuss the evaluation, explain the ratings, and provide feedback about strengths and areas for improvement. The supervisor then completes the evaluation and sends it to the employee to acknowledge before formally closing the review in PATH. The supervisor recognizes and rewards employee performance as merited. Learn more online: EODinfo.tamu.edu/PATHways/model
PATHways Supervisor’s Checklist for Conducting Performance Evaluations

**PREPARE**
- Review job duties on employee’s position description
- Request employee’s self-assessment
- Collect and review data
- Confirm that employee’s required training is current
- Create draft of performance evaluation in PATH Performance Management:
  - Assign individual ratings and comments
  - Develop overall rating and comments
  - Save draft and print

**DISCUSS**
- Review and discuss individual and overall ratings and rationale
- Recognize strengths and achievements
- Discuss areas needing improvement
- Discuss employee’s professional and career development goals
- Discuss performance goals for the next review period

**FINALIZE**
- Revise evaluation in PATH Performance Management as needed
- Add attachments (optional)
- Mark “complete” to submit to employee for acknowledgement
- Review employee comments and take action as appropriate
- Close the evaluation in PATH Performance Management