Employee Performance Review

Manager Evaluation - Staff
Managers decide whether they will require their employees to complete the self evaluation or not.

Self-evaluation is a good practice to obtain employee input on accomplishments, what went well, what could have gone better, and what one may have learned over the past year.

Even if the Manager does not require the self evaluation, employees must submit a self evaluation (even with no information entered).
The contents of this guide is meant for Managers with employees who receive the Staff with Self Evaluation template.

**Note:** A separate guide is available for **Manager Evaluation – Attachment Only** for employees who receive the Attachment Only with Self Evaluation template.
Complete Manager Evaluation

Once the:

- Employee has submitted their self evaluation,
- the Manager has completed the step Get Additional Manager, and
- the Manager has completed the step Get Additional Reviewers

the Manager will receive an Inbox item to **Complete Manager Evaluation**.
The evaluation may be completed in one of two ways:

1. **Guided Editor**
   A step-by-step guide through each section

2. **Summary Editor**
   Displays every section on a single page

For this example, we will be using the Guided Editor.
The Employee Evaluation section shows the ratings and comments made by the employee.

The first section is Attachments. An attachment is not necessary.

In this example, the Manager can see the self evaluation document(s) attached by the employee.

In the Attachments section:

1. Click the hyperlink to open each attachment added by the Employee

2. Click **Add** to add attachments from the Manager
Complete Manager Evaluation

For each attachment the Manager wishes to add:
Click **Attach**

An Open file window will appear that will allow you to browse and select a file.
An Open file window will appear.
1. Select the file you wish to attach
2. Click Open
1. Enter a **Comment** (optional)
2. Click the checkmark to complete the attachment

To add another attachment:
Click **Add**

When finished adding attachments:
Click **Next**
to move to the Goals page
The Goals section shows the self evaluation ratings and comments made by the Employee.

To enter information for the Manager Evaluation:

1. Click the pencil icon to edit the Goals fields
2. Select a Rating
3. Add a Comment (optional)
   Note: Scroll through the Goals section to review each goal appearing in the evaluation.
4. Click Next to move to the Competencies page
Complete Manager Evaluation

A description of each Competency is provided, with examples.

The Competencies are:

- Service
- Teamwork/Collaboration
- Diversity & Respect
- Initiative
- Accountability

<table>
<thead>
<tr>
<th>Competency</th>
<th>Manager Evaluation</th>
<th>Employee Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service</td>
<td></td>
<td></td>
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<tr>
<td>Description</td>
<td></td>
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<tr>
<td>Promotes a culture of service. Examples of behaviors might include:</td>
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<tr>
<td>• Responds appropriately to the needs of internal and external customers.</td>
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<tr>
<td>• Seeks to secure positive interpersonal relations.</td>
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<td>• Conveys instructions, ideas, and information clearly.</td>
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<td>• Follows through on commitments to others.</td>
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<td>• Represents one's position, work unit and organization both internally and externally professionally and responsibly.</td>
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<tr>
<td>• Anticipates needs or problems and acts to meet or resolve responsibly, efficiently and cost-effectively.</td>
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<tr>
<td>For research focused positions, examples of behaviors include:</td>
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<td>• Works to create and sustain a measurable, high standard of quality in research.</td>
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<td>• Facilitates relationship with sponsors in ways that project respect, understanding and professionalism and strengthen the research program.</td>
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<tr>
<td>• Meets frequently and communicates openly to assure sponsor's needs are identified and satisfied.</td>
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<tr>
<td>• Works to develop sustainable initiatives with academic sector or partners.</td>
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</table>

Manager Rating

Employee Rating

Meets Expectations

Comment

During this review period, I provided excellent customer service while making sure I was friendly and respectful.
The Competencies section shows the self evaluation ratings and comments made by the Employee.

To enter information for the Manager Evaluation:

1. Click the pencil icon to edit the Goals fields
2. Select a Manager Rating
3. Add a Comment (optional)
   Note: Scroll through the Competencies section to review each competency.
4. Click Next to move to the Supervisory Competencies page
Complete Manager Evaluation

The Supervisory Competencies are:
- Supervision
- Organizational Leadership

If an employee is not a supervisor, the Manager can leave this section blank.

Click **Next** to move to the Responsibilities page.
The Responsibilities are auto-populated from the Position Restrictions.

To enter information for the Manager Evaluation:

1. Click the pencil icon to edit the Responsibilities fields.
2. Select a Rating.
3. Add a Comment (optional).

Note: Scroll through the Responsibilities section to review each responsibility.

Note: Responsibilities should NOT be added or removed on the Evaluation. Use the Edit Position Restrictions business process instead.
Complete Manager Evaluation

When you are finished with the Responsibilities page:
Click **Next** to move to the Certification Question page.
1. Click the pencil icon to edit the Certification Question
2. Enter a Rating
3. Add a Response
4. Click Next to move to the Overall Rating page
The Manager Evaluation includes an Overall Rating for the Employee.

1. Click the pencil icon to edit
2. Enter a Rating
   The Overall Rating is required.
3. Add a Comment

Note: If the Manager selects an Overall Rating of **Partially Meets Expectations** or **Does Not Meet Expectations** the Manager Evaluation will be routed to the next higher Manager for further review after submission.
Complete Manager Evaluation

**Overall Rating**

Manager Evaluation

**Rating**

- Exceeds Expectations

**Comment**

Click **Next** to move to the Manager/Employee Review Meeting question.
Complete Manager Evaluation

On the Manager/Employee Review Meeting page, the Manager is asked:

“Have you had your Performance Review meeting with your employee?”

The Manager should NOT submit the evaluation until after the Performance Review meeting with their employee.
Once the Performance Review meeting has occurred and all edits are complete:

1. **Enter a Rating**
   If you have not yet had the meeting, you may temporarily leave the **Rating** empty.

2. **Click Next** to move to the Summary Review
Complete Manager Evaluation

In Summary View, the Manager can review and edit the evaluation by scrolling through each of the sections in one window:

- Attachments
- Goals
- Competencies
- Supervisory Competencies
- Responsibilities
- Certification Question
- Overall Rating
- Manager/Employee Review Meeting
Complete Manager Evaluation

At this point, the Manager should click **Save for Later**.

Do **NOT** click **Submit** yet. **Submit** cannot be undone.

If Additional Managers or Additional Reviewers were requested, their input should be submitted before continuing.
If an Additional Manager submitted input, their Comments are visible in the Manager Evaluation. They are labeled with the Additional Manager’s name.
Complete Manager Evaluation

If Additional Reviewers submitted input, their input is visible under Feedback in the Competencies section of the Manager Evaluation. Click the hyperlink to view.
After clicking the Feedback hyperlink, input from the Additional Reviewers is visible. (This input is for Competencies only.)
The Manager can now choose one of the following options:

- Submit
- Send Back
- Save for Later
- Close

Do NOT click **Submit** until the review has been discussed with the Employee.
1. Click **Send Back** if:
   - The Employee needs to take further action on their evaluation or
   - The Manager would like to Get Additional Reviewers input

2. Click **Save for Later** to save the evaluation until after the discussion with the Employee has taken place

3. Click **Close** to close the screen (Closing will save all changes)
Once all input has been provided and the discussion between the Employee is complete:

- Make any final edits
- Select a **Rating** in the Manager/Employee Review Meeting section
- Click **Submit** to finalize the Manager Evaluation

**Note:** **Submit** cannot be undone.
The Manager Evaluation is complete; however, the Performance Review process is not finished.

Up next is the Employee who will acknowledge the evaluation.