Managers decide whether they will require their employees to complete the self evaluation, and if so, what format the attachment should be (memo, performance feedback form, or other format).

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 attachment).
The contents of this guide is meant for Managers with employees who receive the Attachment Only with Self Evaluation template.

Note: A separate guide is available for Manager Evaluation – Staff for employees who receive the Staff with Self Evaluation template.
Who receives the Attachment Only Self Evaluation?

Management Levels 1-5

Chief Executive

Executive Management

Senior Management

Administrative Management

Director (includes Assistant & Associate Director)

Research Professionals - Other
Complete Manager Evaluation

Once the Employee submits their self evaluation, Managers receive an Inbox item to Complete Manager Evaluation for their employees.

Note: For employees with the Attachment Only with Self Evaluation template, neither Get Additional Manager nor Get Additional Reviewer is part of the process.
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 section shows 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**

The attachment type can be any format the Manager chooses, such as a memo, the Performance Feedback Form, or a spreadsheet.
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 file:
Click **Add**
and repeat the process

When finished adding attachments, continue scrolling to the Summary heading.
Under the Summary heading:
Add a **Comment** about the attachments

*Note*: This Summary Comment field is not a comment for the employee’s Overall Rating.

Click **Next** to continue 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**
4. Click **Next**
   to move to the Manager/Employee Review Meeting page

**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.
Have you had your Performance Review meeting with your employee?

1. Select a Rating
   - No if still drafting the evaluation or have not had the meeting
   - Yes after the meeting and before submitting the Manager Evaluation

   Remember: Once you submit the evaluation, no changes can be made.

2. Click Next to move to the Summary page
The Summary page allows you to review and edit all sections of the Manager Evaluation. From there, options include:

- Submit
- Send Back
- Save for Later
- Close

Do NOT click *Submit* until you have had a conversation about the review with your employee.
1. Click **Send Back** if the Employee needs to take further action on their Self Evaluation

2. Click **Save for Later** to save the evaluation as is

3. Click **Close** to close the screen and save the evaluation as is
Complete Manager Evaluation

Once all input has been provided and the discussion between the Employee and the Manager has taken place:

Click **Submit** to finalize the Performance Review

**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.