

Step-by-Step Guide to the Online Performance Management Tool for Staff



2017

Peoplesoft ePerformance

- Purpose –
 - To provide a brief overview of the performance evaluations in Peoplesoft (ePerformance).
 - To define Performance Criteria.
 - To provide you with the detailed instruction for completing your performance evaluation.

Overview

- What is ePerformance? The electronic on-line document used to formally evaluate staff performance within the Peoplesoft System. The evaluation contains three potential components within the process:
 - Establish Performance Criteria
 - Employee Self Evaluation
 - Manager Evaluation
- A meeting has been or will be conducted with the leadership in your division to determine which component(s) is best suited for your division. Please ask your immediate supervisor which component(s) will be utilized.

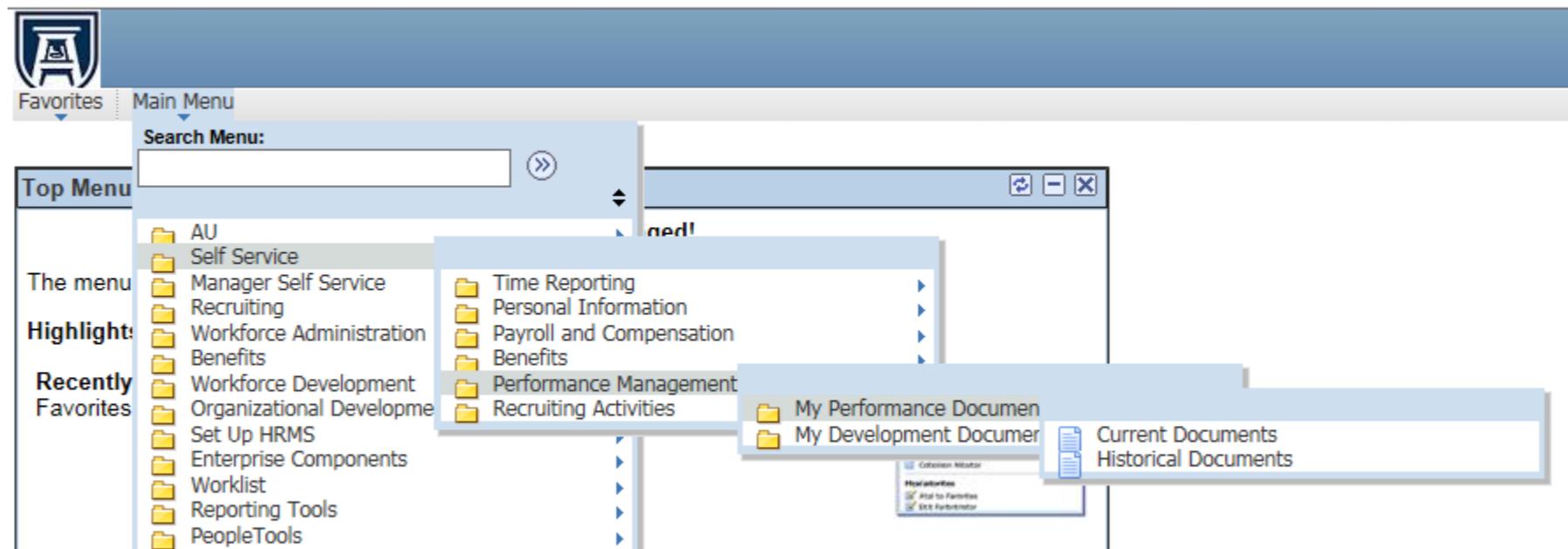
What is the Performance Criteria?

- The establish performance criteria component sets up the key job responsibilities and professional development. The data you enter in these sections (3 and 5) will roll over to the self-evaluation and the manager evaluation.
- To complete the performance criteria, the employee and the manager will need to discuss the duties that will be entered.
 - Quick Tip: If you have a saved Word version of your 2016 evaluation (or prior year), you may be able to simply copy and paste (or use to create high level key job responsibilities).
 - Note: Responsibilities title box has a 50 character limitation; however, the comments section is unlimited and can be used to provide more detail.

Lets get started!

To access the Performance Management Tool, log on to Manager Self Service/PeopleSoft at

<https://hrp461.augusta.edu/psp/hrp461/?cmd=login&languageCd=ENG&>



Navigate by clicking: **Main Menu > Self Service > Performance Management > My Performance Documents > Current Documents.**

1. Click on Annual Performance Review

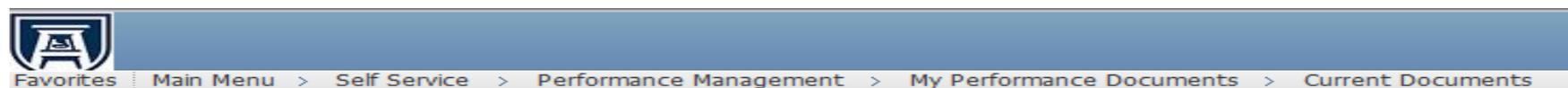
Performance Documents

William Jones

Listed below are your current performance documents.

Your Documents						
Employee ID	Document Type	Begin Date	End Date	Job Title	Status	Manager
030798	Annual Performance Review	03/01/2016	03/31/2016	Administrative Assistant 3	In Progress	Emily Smith

2. On this screen the Performance Criteria, Complete Self Evaluation and Review Manager Evaluation components will be available. Select start, to establish the Performance Criteria.



Performance Documents

Document Details

William Jones, Administrative Assistant 3
Annual Performance Review: 03/01/2016 - 03/31/2016

Performance Document Details				
Employee:	William Jones	Job Title:	Administrative Assistant 3	
Document Type:	Annual Performance Review	Period:	03/01/2016 - 03/31/2016	
Template:	2016 Staff Eval W/ Crit & SE	Document ID:	291	
Manager:	Emily Smith	Status:	In Progress	

Document Progress				
Step	Status	Due Date	Action	Next Action
Performance Criteria	<input type="radio"/> Not Started	01/31/2016		Start
Complete Self Evaluation	<input type="radio"/> Not Started	06/16/2016		
Review Manager Evaluation	<input type="radio"/> Not Started	07/16/2016		

NOTE: Before completing the performance criteria component, please meet with your manager to decide the key job responsibilities that will be entered. It may be helpful to obtain your previous Word evaluation for guidance.

[Return to Select Documents](#)

After selecting start, you will be directed to the Performance Criteria page. The performance criteria component allows the employee to add the key job responsibilities (Section 3) and if applicable, the professional development (Section 5).

3. Scroll down to Section 3 and click Add Key Job Responsibilities.

▼ **Section 3 - Key Job Responsibilities**

Key Job Responsibilities will be evaluated by: Employee, Manager

[Expand](#)

[Collapse](#)



[Add Key Job Responsibilities](#)

4. Add the Key Job Responsibility in the title box and click on update. There is a 50 character limitation in this box. However, you will be able to add more detail during the self evaluation in the “comment” section.

Performance Document - Annual Performance Review

Add Key Job Responsibilities

*Title:

[Return to Performance Criteria](#)

Example of Key Job Responsibility

Key Job Responsibilities will be evaluated by: Employee, Manager

[Expand](#)

[Collapse](#)

▼ Manage the Department of XYZ

Created By: William Jones



You are allowed to add as many key job responsibilities as you need. Please discuss these responsibilities with your manager before completing.

If you need to edit the key job responsibility that was entered click on the pencil. If you need to delete the key job responsibility that was entered click on the trash can.



[Add Key Job Responsibilities](#)

5. The next section to complete is section 5, Professional Development (if applicable). Click on Add Professional Development.

Section 5 - Professional Development

Professional Development will be evaluated by: Employee, Manager

[Expand](#) [Collapse](#)
[+ Add Professional Development](#)

6. Add the Professional Development in the title box and click on update. There is a 50 character limitation in this box. However, you will be able to add more detail during the self evaluation in the "comment" section. Select update to continue.

Performance Document - Annual Performance Review

Add Professional Development

*Title:

Status:

Update

[Return to Performance Criteria](#)

Example of Professional Development

Professional Development will be evaluated by: Employee, Manager

[Expand](#) [Collapse](#)

Advanced Excel Training Class

Status: Complete



Created By: William Jones 03/20/2017 1:22PM

If you need to edit the professional development that was entered click on the pencil. If you need to delete the professional development that was entered click on the trash can.



7. After completing sections 3 and 5 (if applicable), scroll down to the bottom of the page and click complete.

Note: If your department chose not to utilize the self-evaluation, you are finished. Your manager will receive an email to complete the manager evaluation. Go to the * on page 36 for further instructions. If your department chose to complete a self-evaluation please continue to #8.



8. You will be directed back to the document detail page. To start your self evaluation, click on Start in the next action column.

Performance Documents

Document Details

William Jones, Administrative Assistant 3
Annual Performance Review: 03/10/2016 - 03/31/2016

✓ You have successfully completed the Establish Criteria step.

Performance Document Details				
Employee:	William Jones	Job Title:	Administrative Assistant 3	
Document Type:	Annual Performance Review	Period:	03/10/2016 - 03/31/2016	
Template:	2016 Staff Eval W/ Crit & SE	Document ID:	302	
Manager:	Emily Smith	Status:	In Progress	
Document Progress				
Step	Status	Due Date	Action	Next Action
Performance Criteria	✓ Completed	01/31/2016	View	
Complete Self Evaluation	○ Not Started	06/16/2016		Start
Review Manager Evaluation	○ Not Started	07/16/2016		

[Return to Select Documents](#)

9. Complete Section 1 – Customer Service

Click **Expand All**, to expand all the sections of the evaluation.



[Expand All](#)

[Collapse All](#)

[Expand Sections](#)

Section 1 - Customer Service

A critical component to Augusta University's success is customer service. Because of AU's strong commitment to customer service, it is automatically considered a goal and job responsibility for all. It is the responsibility of every employee to provide a customer friendly environment and superior service to our patients, students, staff, and faculty. Augusta is a patient-and-family-centered care institution, where employees partner everyday with patients and families for success.

[Expand](#)

[Collapse](#)

[View Other Authors](#)

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



Customer Service

Description : To what extent does the employee demonstrate excellence in customer service when interacting with students, faculty, staff, and patients?

Rating: 

Comments: 

[Writing Tools](#)

Created By: Template

You are now ready to enter **comments** to describe your customer service efforts. There are no character limitations.

Click on this icon to get a description of the ratings.



A spell check feature is also provided. Click this icon to check your spelling.



Example of Customer Service

Customer Service

Description : To what extent does the employee demonstrate excellence in customer service when interacting with students, faculty, staff, and patients?

Rating: 

Comments: 

Created By: Template 03/10/2017 11:24AM

10. Complete Section 2 – Core Standards of Excellence. These Standard are pre-populated.

Section 2 - Core Standards of Excellence

All employees are responsible for demonstrating the Enterprise's core values. Below are listed six categories of performance that are key to providing quality service to students, patients and customers in a manner that reflects these values. At the start of the review cycle, review the expected performance with the employee in each of these categories.

[Expand](#)

[Collapse](#)

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Leadership

Description : Reflected in Courage, Honor, Professionalism, Transparency, and Vision

Rating:

Comments:

Created By: Template

You are now ready to enter **comments** to describe your leadership efforts. There are no character limitations.

Example of Leadership

Leadership

Description : Reflected in Courage, Honor, Professionalism, Transparency, and Vision

Rating:

Comments:

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Collegiality

Description : Reflected in Collaboration, Partnership, Sense of Community, and Teamwork

Rating:

Comments:

Created By: Template

You are now ready to enter **comments** to describe your collegiality. There are no character limitations.

Example of Collegiality

Collegiality

Description : Reflected in Collaboration, Partnership, Sense of Community, and Teamwork

Rating: 2-Meets Expectations

Comments: I enjoy collaborating with our team as well as others within our department.

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Compassion

Description : Reflected in Caring, Empathy, and Social Responsibility

Rating:

Comments: [Writing Tools](#)

Created By: Template

You are now ready to enter **comments** to describe your compassion. There are no character limitations.

Example of Compassion

Compassion

Description : Reflected in Caring, Empathy, and Social Responsibility

Rating:

Comments: I am compassionate towards our customers as well as co-workers.

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



Excellence

Description : Reflected in Distinction, Effectiveness, Efficiency, Enthusiasm, Passion and Quality

Rating:  

Comments:

Created By: Template



You are now ready to enter **comments** to describe your excellence. There are no character limitations.

Example of Excellence

Excellence

Description : Reflected in Distinction, Effectiveness, Efficiency, Enthusiasm, Passion and Quality

Rating: 2-Meets Expectations  

Comments: I enjoy my job, therefore I make every effort to display my passion each assignment that I am given. 

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Inclusivity

Description : Reflected in Diversity, Equality, Fairness, Impartiality, and Respect

Rating: 

Comments:
[Writing Tools](#) 

Created By: Template

You are now ready to enter **comments** to describe your inclusivity efforts. There are no character limitations.

Example of Inclusivity

Inclusivity

Description : Reflected in Diversity, Equality, Fairness, Impartiality, and Respect

Rating: 2-Meets Expectations 

Comments: I have often made changes to policies to better suit the customers and to ensure that we work more efficiently. 

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Integrity

Description : Reflected in Accountability, Ethical Behavior, Honesty, and Reliability

Rating:

Comments: [Writing Tools](#)

Created By: Template

You are now ready to enter **comments** to describe your integrity. There are no character limitations.

Example of Integrity

Integrity

Description : Reflected in Accountability, Ethical Behavior, Honesty, and Reliability

Rating:

Comments: I am very reliable and take pride in my ethical behavior when dealing with customers.

Created By: Template 03/10/2017 11:24AM

11. Click on the calculator to calculate the average for the Core Standards of Excellence Section.

Core Standards of Excellence Summary	
Employee Rating:	2-Meets Expectations



12. Complete Section 3 – Key Job Responsibilities. The key job responsibility that was entered during the Performance Criteria, rolled over to your self-evaluation.

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



Manage the Department of XYZ	
Rating:	2-Meets Expectations
Comments:	Manages all aspects of the administrative and fiscal areas for the department, including major programmatic planning, development and financial administration of Department XYZ. Provide planning, budgeting, HR and all financial oversight.
Created By:	William Jones
	03/20/2017 1:13PM



Additional information about your job duty may be entered here. This field is unlimited.



13. Complete Section 4 – Annual Training/Compliance. Once you click on the pencil you will be taken to a screen that allows you to select your answer.

▼ **Section 4 - Annual Training/Compliance**

Each employee is required to complete the annual training and compliance awareness requirements annually. Please indicate (Yes) the employee has completed the requirements by selecting the red edit pen to the right and select the correct status. For employees whose hire date is after November 1st of the previous annual training and compliance cycle, training will have been covered by new employee orientation. To confirm completion, please contact HR at HUMANRESOURCES_TRAINING@AU.edu

[Expand](#)

[Collapse](#)

[View Other Authors](#)

▼ Annual Training/Compliance and Professional Development inst		
• Status:		
Created By:	Template	02/13/2017 12:15AM

Click on the pencil to be taken to the next screen.

Performance Document - Annual Performance Review

Edit Annual Training/Compliance

Title: Annual Training/Compliance and Professional Development inst

Status:

Created By: Template 02/13/2017 12:15AM

[Return to Update Annual Training/Compliance Criteria](#)

Your options will be:

- Yes
- No
- Not required this Cycle

14. Complete Section 5 – Professional Development. The professional development that was entered on the performance criteria rolled over to the self evaluation. If you did not enter a professional development, proceed to Section 6.

Section 5 - Professional Development

Identify any training or development activities the employee has completed since his/her last performance appraisal.

Expand Collapse

Advanced Excel Training Class

- Status: Complete

Comments:

Created By: William Jones

You are now ready to enter **comments** in reference to your professional development. There are no character limitations.

The professional development that was entered on the Performance Criteria rolled over to your self-evaluation

Example of Professional Development

Section 5 - Professional Development

Identify any training or development activities the employee has completed since his/her last performance appraisal.

Expand Collapse

Advanced Excel Training Class

- Status: Complete

Comments:

This course was completed on September 5, 2016.

Created By: William Jones 03/20/2017 1:22PM

15. Complete Section 6 – Performance Factors. The performance factors are pre-populated.

Section 6 - Performance Factors

In this section, the performance factors tend to reinforce the key job responsibilities identified in Section 3. Select the rating from the dropdown box that best identifies the employee's job performance and make comments as appropriate. The supervisor's written comments can be the most important part of this appraisal section. Please indicate specific areas of improvement needed in the comment section if the performance factor is rated "Needs Immediate Improvement". If the employee is classified staff, please complete the following performance factors in entirety. If the employee falls in the Managerial/Professional category, please complete the Managerial/Professional Staff Section below.

[Expand](#) [Collapse](#)

The ratings that you are able to choose from are:

- 1. Exceeds Expectations
- 2. Meets Expectations
- 3. Inconsistently Meets
- 4. Needs Immediate Improvement

Job Knowledge

Description : To what extent does the employee understand the job duties and responsibilities?

Rating:

Comments:

[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your job knowledge. There are no character limitations.

Example of Job Knowledge

Job Knowledge

Description : To what extent does the employee understand the job duties and responsibilities?

Rating: 2-Meets Expectations

Comments: I understand my job duties completely and take full responsibility for my work whether good or bad.

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Quality of Work

Description :
To what extent does the employee's work meet the required quality standards, i.e., accuracy, neatness and thoroughness?

Rating:  

Comments:
[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your quality of work. There are no character limitations.

Example of Quality of Work

Quality of Work

Description :
To what extent does the employee's work meet the required quality standards, i.e., accuracy, neatness and thoroughness?

Rating: 2-Meets Expectations  

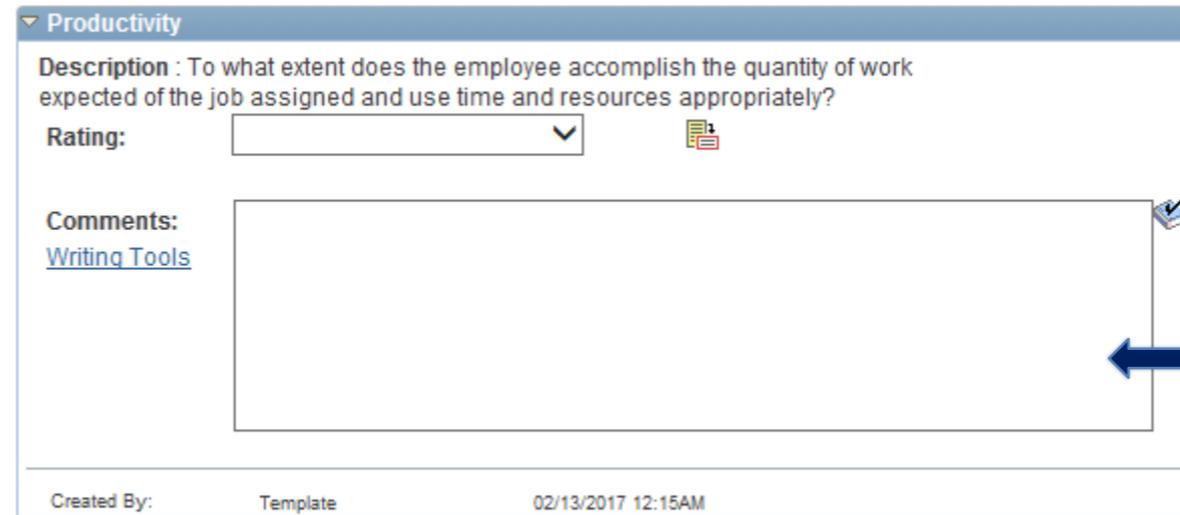
Comments:

I take pride in my work. When completing an assignment I ensure that my work is accurate and neat before submission.

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



Productivity

Description : To what extent does the employee accomplish the quantity of work expected of the job assigned and use time and resources appropriately?

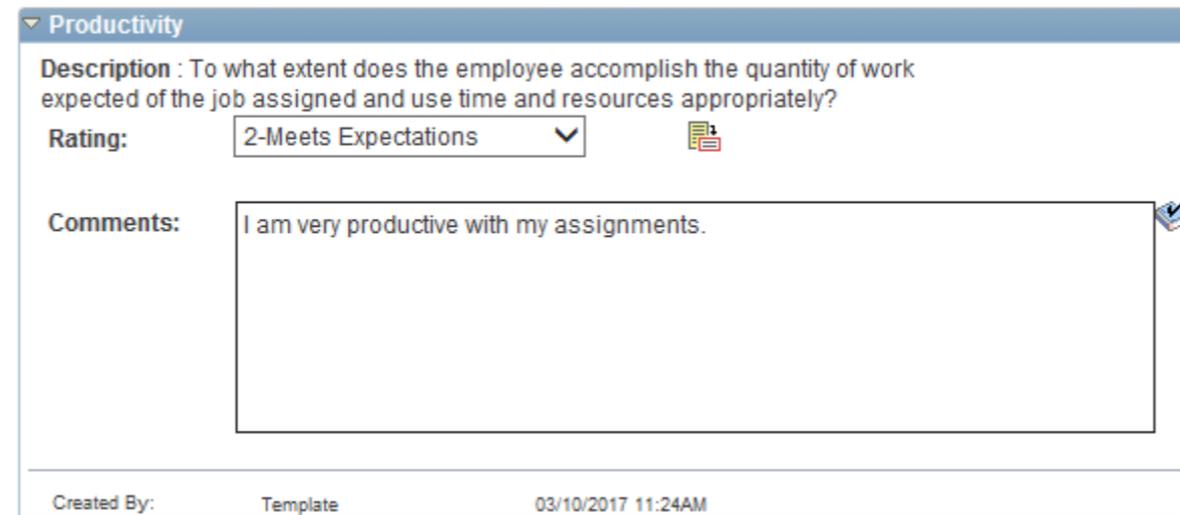
Rating:

Comments:
[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your productivity. There are no character limitations.

Example of Productivity



Productivity

Description : To what extent does the employee accomplish the quantity of work expected of the job assigned and use time and resources appropriately?

Rating: 2-Meets Expectations

Comments: I am very productive with my assignments.

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Recordkeeping and/or Documentation

Description : To what extent does the employee adequately prepare and maintain records, written reports, correspondence, and files?

Rating:

Comments: [Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your recordkeeping and/or documentation. There are no character limitations.

Example of Recordkeeping and/or Documentation

Recordkeeping and/or Documentation

Description : To what extent does the employee adequately prepare and maintain records, written reports, correspondence, and files?

Rating:

Comments: I maintain my records and files appropriately. They are easy to locate if I am not available.

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



RELIABILITY

Description : To what extent does the employee perform work consistently without close supervision or assistance?

Rating:  

Comments: 

[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your reliability. There are no character limitations.



Example of Reliability

Reliability

Description : To what extent does the employee perform work consistently without close supervision or assistance?

Rating: 2-Meets Expectations  

Comments: I am very reliable and do not require close supervision. 

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

ADAPTABILITY

Description : To what extent does the employee readily adapt to new situations and changes in routines, work load and work assignments?

Rating:

Comments: [Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your adaptability. There are no character limitations.

Example of Adaptability

Adaptability

Description : To what extent does the employee readily adapt to new situations and changes in routines, work load and work assignments?

Rating:

Comments: I adapt to new situations and projects.

Created By: Template 03/10/2017 11:24AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

INITIATIVE

Description : To what extent does the employee present new ideas; improve procedures; or otherwise demonstrate an awareness of clerical or technical changes related to the job, and take appropriate action without instruction or urging?

Rating:  

Comments: 
[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your initiative. There are no character limitations.

Example of Initiative

Initiative

Description : To what extent does the employee present new ideas; improve procedures; or otherwise demonstrate an awareness of clerical or technical changes related to the job, and take appropriate action without instruction or urging?

Rating: 2-Meets Expectations  

Comments: I present new ideas and constantly look for ways to make our customer's experience better. 

Created By: Template 03/20/2017 10:57AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Attendance

Description : To what extent does the employee maintain satisfactory attendance in regard to tardiness, early departures, absences, and working assigned schedule?

Rating:

Comments:

[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe your attendance. There are no character limitations.

Example of Attendance

Attendance

Description : To what extent does the employee maintain satisfactory attendance in regard to tardiness, early departures, absences, and working assigned schedule?

Rating:

Comments:

[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

Relationships with Others

Description : To what extent does the employee establish effective working relationships when dealing with others (supervisors, co-workers, patients, the public, etc.) and promote the effectiveness of other employees?

Rating:

Comments: [Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe relationship with others. There are no character limitations.

Example of Relationship with Others

Relationships with Others

Description : To what extent does the employee establish effective working relationships when dealing with others (supervisors, co-workers, patients, the public, etc.) and promote the effectiveness of other employees?

Rating:

Comments: [Writing Tools](#)

William manages his relationships with his coworkers, managers, and employees in a professional manner.

Created By: Template 02/13/2017 12:15AM

The ratings that you are able to choose from are:

- 1. Exceeds Expectations
- 2. Meets Expectations
- 3. Inconsistently Meets
- 4. Needs Immediate Improvement



ADHERE TO POLICIES AND PROCEDURES

Description : To what extent does the employee follow Augusta and department specific policies and procedures (i.e., safety, dress guidelines, professionalism, and administrative policies and procedures)?

Rating:

Comments:
[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

You are now ready to enter **comments** to describe how you adhere to policies and procedures. There are no character limitations.



Example of Adheres to Policies and Procedures

ADHERE TO POLICIES AND PROCEDURES

Description : To what extent does the employee follow Augusta and department specific policies and procedures (i.e., safety, dress guidelines, professionalism, and administrative policies and procedures)?

Rating: 1-Exceeds Expectations

Comments:
[Writing Tools](#)
William consistently adheres to policies and procedures set forth by the Institution, as well as manages and contributes to the policies created by the department.

Created By: Template 02/13/2017 12:15AM

16. Click on the calculator to calculate the average for the Performance Factors.

Performance Factors Summary

Employee Rating: 2-Meets Expectations



17. Complete Section 7 – Manager/Professional Staff Only (If applicable). *This section is for Managers and Exempt level staff only.* The questions are pre-populated.

Section 7 - Managerial/Professional Staff Only

[Expand](#) [Collapse](#)
[View Other Authors](#)

PLANNING AND ANALYTICAL ABILITY

Description : To what extent does the employee demonstrate the skills to analyze, solve problems, and prioritize?

Rating: 

Comments:
[Writing Tools](#)

Created By: Template 02/21/2017 2:27PM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

You are now ready to enter **comments** to describe your planning and analytical ability. There are no character limitations.

MANAGERIAL SKILLS

Description : To what extent does the employee effectively work well with and through others to complete assignments in a timely and productive manner demonstrating a commitment to customer service?

Rating: 

Comments:
[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement

You are now ready to enter **comments** to describe your manager skills. There are no character limitations.

The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



▼ MENTORING OF OTHERS - Section A

Description : To what extent does the employee guide/encourage others to become more effective in work assignments and better prepared for future professional development?

Rating:  

Comments:

[Writing Tools](#) 

Created By: Template 02/21/2017 2:27PM

You are now ready to enter **comments** to describe your mentoring of others. There are no character limitations.



The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



▼ MENTORING OF OTHERS - Section B

Description : To what extent does the employee effectively evaluate others, ensuring productive work in support of the university/college/division's strategic plan, including the development of an Employee Development Plan or Performance Improvement Plan when needed?

Rating:  

Comments:

[Writing Tools](#) 

Created By: Template 02/21/2017 2:27PM

You are now ready to enter **comments** to describe mentoring of others. There are no character limitations.



The ratings that you are able to choose from are:

1. Exceeds Expectations
2. Meets Expectations
3. Inconsistently Meets
4. Needs Immediate Improvement



COMMUNICATION SKILLS

Description : To what extent can the employee effectively express himself/herself orally and in writing including correspondence, reports, and presentations at conferences, seminars, workshops, etc., as required by the job?

Rating:

Comments:

[Writing Tools](#)

Created By: Template 02/13/2017 12:15AM



You are now ready to enter **comments** to describe your communication skills. There are no character limitations.

18. Click on the calculator to calculate the average for the Managerial/Professional Staff.

Managerial/Professional Staff Only Summary

Employee	2-Meets Expectations		
Rating:			

19. Complete Section 8 – Future Training/Development and Goals and Objectives (If applicable).

Section 8 - Future Training/Development and Goals/Objectives

This section will be used to identify areas in which job performance has been significantly above average during the last year. Select the plus sign below to add additional comments.

[Expand](#)

[Collapse](#)

[View Other Authors](#)

[+ Add Future Training/Development and Goals/Objectives](#)

Click here to add

Performance Document - Annual Performance Review

Add Future Training/Development and Goals/Objectives

*Title:

Long Description:

Update

[Return to Update Future Training/Development and Goals/Objectives Criteria](#)

Add the title and description of future training/development and goal/objectives here. Note: There is a 50 character limit in the title bar; the long description box is unlimited. Once entered, click on update to continue.

20. Complete Section 9 – Annual Health Screening Requirement.

Section 9 - Annual Health Screening Requirement

NOTE to Manager: If the employee you are evaluating works in the hospital, an annual health screening is required pursuant to hospital policy. Please schedule this screening with Employee Health in accordance with the appraisal deadline.

NOTE to Employee: If you work in the hospital, an annual health screening is required and your manager will be scheduling this screening before the end of the appraisal period.

Please indicate the date of the Date of Employee's Annual Health Screening below.

Please Note: Performance appraisal cycle runs from March 1 - April 30 annually and are due to Human Resources (HS 1146) by May 15 of each year. Please schedule health screenings in a timely manner in order to meet this deadline.

[Expand](#) [Collapse](#)

Annual Health Screening Requirement

• Status:

Created By: Template 03/20/2017 10:57AM



Select the pencil to be enter your status.

Performance Document - Annual Performance Review

Edit Annual Health Screening Requirement

*Title: Annual Health Screening Requirement

Status:

Created By: Template 03/20/2017 10:57AM

Your choices will be:

- No
- Not required for this cycle
- Yes

Click on update to continue.

If you have questions about whether or not you are required to have an annual healthy screening, please see your immediate supervisor.

[Return to Update Annual Health Screening Requirement Criteria](#)

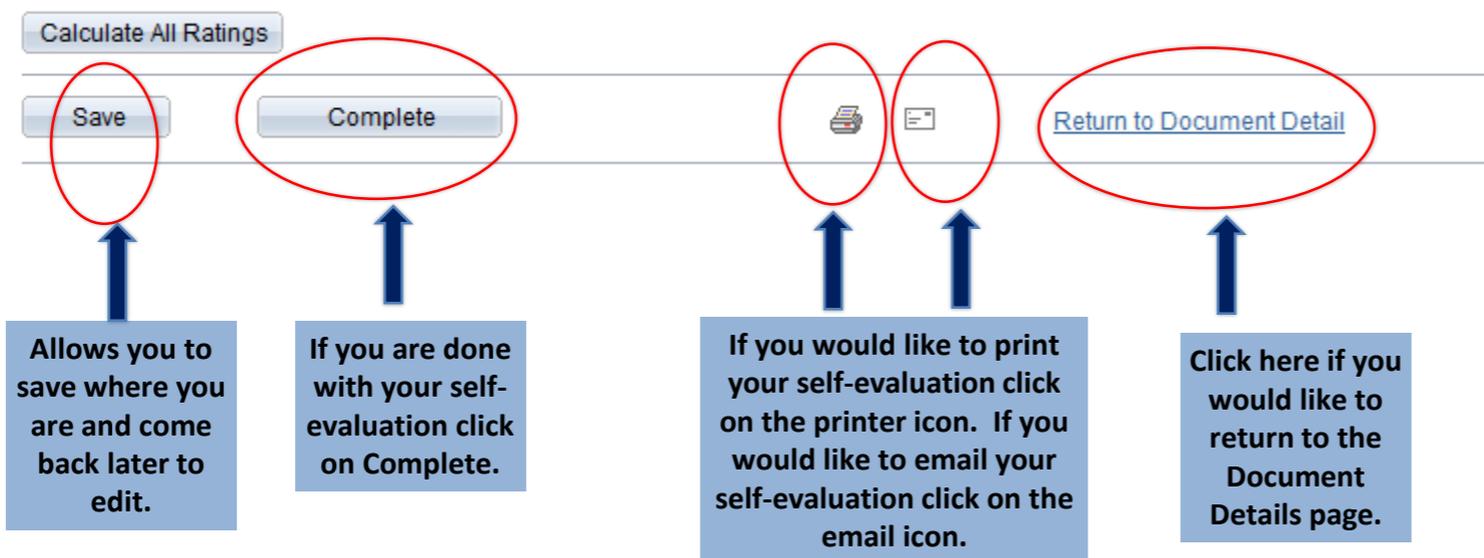
21. Complete Section 10 – Overall Rating. Click on the calculator to calculate the overall rating of the self-evaluation.

Section 10 - Overall Rating

Overall Rating Summary

1-Exceeds Expectations 2-Meets Expectations 3-Inconsistently Meets 4-Needs Immediate Improvement

Employee Rating: 2-Meets Expectations



Note: If you click complete, but realize that you need to modify your self-evaluation contact Tracy West, at 706-721-7308 to re-open your self-evaluation. Unfortunately the performance criteria component can not be re-opened. Any modifications needed for your performance criteria will have to be made by your manager during the manager evaluation.

Once your self-evaluation is complete, your manager will receive an email alert to complete the manager evaluation.

*After the manager completes the manager evaluation, you will receive an email notification that the manager evaluation is available for you to view. At this point you are allowed to make comments and save them.

The next step would be for the manager to set up a meeting to discuss the evaluation(s).

Once the meeting is held and the manager marks the evaluation as "Review Held", you will receive another email. This email will request that you acknowledge the review has been conducted.

Performance Documents

Document Details

William Jones, Administrative Assistant 3
Annual Performance Review: 05/01/2016 - 05/30/2016

Performance Document Details				
Employee:	William Jones	Job Title:	Administrative Assistant 3	
Document Type:	Annual Performance Review	Period:	05/01/2016 - 05/30/2016	
Template:	2016 Staff Eval W/ Crit & SE	Document ID:	429	
Manager:	Emily Smith	Status:	Review Held	

Document Progress				
Step	Status	Due Date	Action	Next Action
Performance Criteria	✓ Completed	07/29/2016	View	
Complete Self Evaluation	✓ Completed	08/15/2016	View	
Review Manager Evaluation	🕒 Review Held	09/14/2016	View	Acknowledge

Click on Acknowledge> Acknowledge Review>OK. .

At any time you can save any entries you make on the evaluation by using the Save button.

If you are ready to acknowledge the evaluation, select the Acknowledge button.

Save

Acknowledge Review



[Return to Document Detail](#)

Performance Document - Annual Performance Review

Acknowledge Document Review

You have chosen to acknowledge your performance evaluation. To confirm this acknowledgement, select the OK button.

OK

Cancel

This concludes your online performance evaluation. Your evaluation is now available in historical documents.

