Step-by-Step Guide to the Online

Performance Management Tool
for

Managers

2017

Manager Evaluation

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

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

2. Click **Current Documents.**

1. **A list of your direct reports will be displayed by name. Select the employee you wish to evaluate.**

Current Performance Documents

Listed below are the current performance documents for which you are the Manager.

Documents you own							Personalize	Find	🗗	🏢 First ◄ 1 of 1 ► Last
Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status
030798	William Jones	Annual Performance Review	02/13/2017	02/28/2017	Administrative Assistant 3	In Progress

A list of your direct reports will be displayed by name. Select the employee you wish to evaluate.

2. **Click Start to begin the Manager Evaluation.**

Current Performance Documents
Document Details

William Jones, Administrative Assistant 3
Annual Performance Review: 06/01/2016 - 06/30/2016

Performance Document Details			
Employee:	William Jones	Job Title:	Administrative Assistant 3
Document Type:	Annual Performance Review	Period:	06/01/2016 - 06/30/2016
Template:	2016 Staff Eval W/ Crit & SE	Document ID:	428
Manager:	Emily Smith	Status:	In Progress

Document Progress				
Step	Status	Due Date	Action	Next Action
Performance Criteria	✔ Completed	08/29/2016	View	
Review Self Evaluation	✔ Completed	09/15/2016	View	
Complete Manager Evaluation	○ Not Started	10/15/2016	Start	

Return to Select Documents

The performance criteria and self-evaluation are completed by the employee.

On the complete manager evaluation row, click **Start**.

Note: To view a pdf of the employee's self-evaluation. On the Document Details Page, click on view next to the "Review Self Evaluation". Once on the Self-Evaluation, click on the print icon. A new tab will open with the pdf version of the self-evaluation. You are able to shift between the two tabs as you complete the evaluation.

3. After selecting start, you will be directed to the Manager Evaluation page. On the top of this page there will be the employee data, which consists of the employee's ID, Department Number and Name as well as their years of service.

Performance Document - Annual Performance Review

Manager Evaluation

William Jones, Administrative Assistant 3
Annual Performance Review: 06/01/2016 - 06/30/2016

Author:	Emily Smith	**Role:**	Manager
Status:	In Progress	**Due Date:**	10/15/2016
Approval:	Not Required		

▼ Employee Data

Empl ID:	030798	
Department:	20500012	Administration
Location:	120	Augusta University
Years of Service:	1 Years 5 Months	

Rating History

The Rating History button, supplies the manager with a history of the overall ratings for the employee. Because this is our first year completing ePerformance, the employee will not have an overall rating history.

This Performance Evaluation is meant to promote individual and organizational effectiveness and to encourage ongoing, constructive communication.

The objectives are (1) to assess performance, (2) to ensure that efforts support Augusta University's goals of education, clinical, research, and business growth, operating margin, customer satisfaction, and Augusta University's leadership integration (3) to assist in identifying performance objectives for future accomplishment, (4) to promote individual development, (5) to provide opportunity for dialogue about support needed to advance Augusta University's strategic objectives.

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

Save   Available for Review   🖨 ✉ 📊 Return to Document Detail

You my **save** and return to complete the evaluation as many times as you need.

The **Available for Review** button should not be selected until you are finished. However, if you mistakenly select this button, click on "Return to Document Detail" button and then select "cancel". You will be returned to the Documents Detail page. Select Action of Edit.

4. 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

View Other Authors, allows the manager to view comments made on the employee's self evaluation. Once you click on view other authors, click expand and you will be able to view the rating and comment.

▽ **Customer Service**

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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [dropdown]

The ratings that you are able to choose from are:

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

Comments:
Writing Tools

You are now ready to enter comments to describe the employee's customer service. There are no character limitations.

Created By: Template

Performance Document - Annual Performance Review
Average Ratings

Section: Customer Service
Item: Customer Service
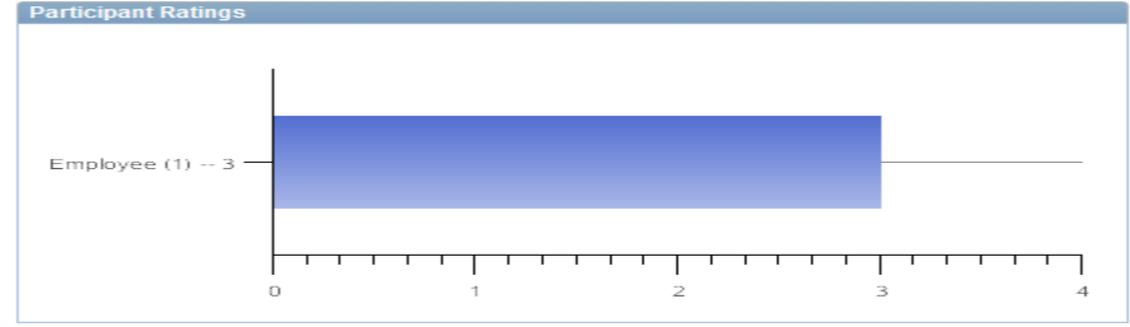Average Rating: 2-Meets Expectations 3.00

Participant Ratings

The 3.00 that is shown above, circled in red, represents the average rating for this item. If you click the icon beside it you will be taken to the Average Ratings screen.

4 = Exceed Expectations
3 = Meets Expectations
2 = Inconsistently Meets
1 = Needs Immediate Improvement

Employee (1) -- 3

0   1   2   3   4

Return to Previous Page

5. Complete Section 2 – Core Standards of Excellence. These standards 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

Leadership

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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▼]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

The core standard of excellence are pre-loaded. 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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▼]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

Note: You are able to view the rating that the employee entered here.

If the employee entered a comment, you are able to copy and paste it in your comment section by using the writing tools feature. To view or copy and paste what the employee has entered in their comments on the self-evaluation, click on Writing Tools. Once you get on the Writing Tools screen, select the comment you would like to copy, click add to comments, and save and return. Now the employee's comment is visible in your comments box and you can edit as needed.

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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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▼]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▼]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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

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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [⌄]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [⌄]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

Core Standards of Excellence Summary

Self-Evaluation Rating: 2-Meets Expectations   3.00

Manager Rating: Override

To calculate the suggested rating, select the calculator icon. To override the suggested rating click on override

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

Section 3 - Key Job Responsibilities

For Classified Staff Employee: This section of the form is designed to make the form "job specific" by listing, in order of importance, key job responsibilities being evaluated. Rate the employee's performance on each essential function of the job using the rating scale described on the instruction sheet.

For Managerial/Professional Employee: In units where goals and objectives have been identified in writing, the employee should be evaluated on those predetermined and predefined goals or objectives. In units where goals and objectives have not been established, the supervisor should identify the major duties and/or responsibilities of the job and evaluate the employee accordingly. In either situation, a performance dimension for all supervisory personnel is commitment to equal employment opportunity and diversity in the workplace. Where predetermined goals and objectives are not used, the employee should be evaluated on projects, job duties and special assignments. Check the appropriate performance level.

If other major responsibilities have been identified that have not been captured in any of the four Goal/Objective/Project/Major Job Duty/Special Assignment's sections listed above, please click the plus sign below and add and rate those responsibilities.

Expand   Collapse
View Other Authors

Manage the departm,ent of XYZ

Self-Evaluation Rating:	2-Meets Expectations 3.00
Rating:	2-Meets Expectations
Comments: Writing Tools	Manage 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 3:23PM

The ratings that you are able to choose from are:

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

Notice "department" is misspelled. To correct click on the pencil, or if you need to delete this key job responsibility click on the trash can.

If the employee missed adding a key job responsibility, you are able to add here by selecting "add key job responsibilities"

Add Key Job Responsibilities

Key Job Responsibilities Summary

Self-Evaluation Rating:	2-Meets Expectations 3.00
Manager Rating:	Override

To calculate the suggested rating, select the calculator icon. To override the suggested rating click on override

8. Review Sections 4 – Annual Training/Compliance and 5 - Professional Development. Sections 4 and 5 are completed by the employee but can be edited by the manager by clicking on the pencil.

If the employee missed adding a professional development, you are able to add it here, but clicking on "add professional development"

You are now ready to enter **comments** to describe the employee's professional development class taken during the evaluation period. There are no character limitations.

9. 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
View Other Authors

▼ **Job Knowledge**

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

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▾]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▾]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

The ratings that you are able to choose from are:

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

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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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [dropdown]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [dropdown]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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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?

Self-Evaluation Rating: 2-Meets Expectations 3.00

Rating:

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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?

Self-Evaluation Rating: 2-Meets Expectations 3.00

Rating:

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▾]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▾]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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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?

Self-Evaluation Rating: 2-Meets Expectations 3.00

Rating: [▼]

Comments:
Writing Tools

| Created By: | Template | 03/20/2017 10:55AM |

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?

Self-Evaluation Rating: 2-Meets Expectations 3.00

Rating: [▼]

Comments:
Writing Tools

| Created By: | Template | 03/20/2017 10:55AM |

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10. After rating all performance factors, click on the calculator below to calculate the average for this section.

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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating:

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

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)?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating:

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

Performance Factors Summary

Self-Evaluation Rating: 2-Meets Expectations   3.00

Manager Rating: Override

To calculate the suggested rating, select the calculator icon. To override the suggested rating click on override

AUGUSTA UNIVERSITY

11. 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?

Self-Evaluation Rating:	2-Meets Expectations	3.00

Rating: [▽]

Comments:

Writing Tools

Created By: Template   03/20/2017 10:55AM

The ratings that you are able to choose from are:

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

▽ **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?

Self-Evaluation Rating:	2-Meets Expectations	3.00

Rating: [▽]

Comments:

Writing Tools

Created By: Template   03/20/2017 10:55AM

The ratings that you are able to choose from are:

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

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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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▼]

Comments:
Writing Tools
[   ]

Created By: Template   03/20/2017 10:55AM

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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [▼]

Comments:
Writing Tools
[   ]

Created By: Template   03/20/2017 10:55AM

AUGUSTA UNIVERSITY

12. After rating all of section 7, click on the calculator below to calculate the average.

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?

Self-Evaluation Rating: 2-Meets Expectations   3.00

Rating: [dropdown]

Comments:
Writing Tools

Created By: Template   03/20/2017 10:55AM

Managerial/Professional Staff Only Summary

Self-Evaluation Rating: 2-Meets Expectations   3.00

Manager Rating: Override

To calculate the suggested rating, select the calculator icon. To override the suggested rating click on override

13. Complete Section 8 – Future Training/Development and Goals and Objectives (If applicable). If the employee entered information here, click on view other authors. If you approve of what was enter, click on "Add Future Training/Development and Goals and Objectives.

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

To view future training/development and goals/objectives entered by the employee, click on view other authors. If you agree with what was entered, click to add the 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 training or goal here. Note: There is a 50 character limit in the title bar. Click on "Update" to continue.

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14. Review Section 9 – Annual Health Screening Requirement.

As the manager, you have the ability to edit the status of the Annual Health Screening Requirement if needed.

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

Section 10 - Overall Rating

View Other Authors

Overall Rating Summary

Self-Evaluation Rating: 2-Meets Expectations   3.00

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

Manager Rating: Override

To calculate the suggested rating, select the calculator icon. To override the suggested rating click on override

Section 11 - Manager Comments

View Other Authors

Comments:
Writing Tools

Your comments about the overall evaluations are entered here.

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16. If you are complete and would like to make the evaluation available for the employee to review, click on "Available for Review".

Attachments

No Attachments have been added to this document

If you need to add attachments pertaining to the evaluation click Add Attachment

➕ Add Attachment

Audit History

| Created By: | Tracy Lakesha West | 03/22/2017 2:23:27PM |
| Last Modified By: | Emily Smith | 03/23/2017 9:23:40AM |

Check Language

Calculate All Ratings

Save   Available for Review   🖨 ✉ 📊   Return to Document Detail

Allows you to save where you are and come back later to edit.

If you are done and you are ready for your employee to view the document, click on Available for Review.

If you would like to print your self-evaluation click on the printer icon. If you would like to email your self-evaluation click on the email icon.

**Click here if you would like to return to the Document Details page.**

Performance Document - Annual Performance Review

Available for Review

You have chosen to allow the employee to view this evaluation. To confirm that that the employee can view evaluation, select the OK button.

The overall rating you have assigned to this document is 2-Meets Expectations.

Once you click OK the evaluation will be available for review.

OK   Cancel
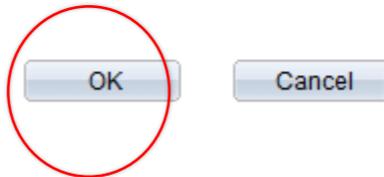
17. The next step would be for you to set up a meeting with your employee to discuss the evaluation(s). Once the meeting has been held, return to the document details page by logging back into manager self service and clicking on the appropriate evaluation. Click on Mark Review Conducted.

Current Performance Documents

Document Details

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

☑ You have successfully made your evaluation available for the employee's review.

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:**	434
Manager:	Emily Smith	**Status:**	Available for Review

Document Progress

Step		Status	Due Date	Action	Next Action
Performance Criteria	✔	Completed	05/30/2016	View	
Review Self Evaluation	✔	Completed	06/16/2016	View	
Complete Manager Evaluation	◑	Available for Review	07/16/2016	View	Mark Review Conducted

Return to Select Documents

AUGUSTA UNIVERSITY

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

Save   Review Conducted   🖨 ▤ 📊   Return to Document Detail

Performance Document - Annual Performance Review
Review Conducted

You have chosen to confirm that the performance review was conducted for this document. To confirm that a review was conducted, select the OK button.

OK   Cancel

18. Once you click OK, your employee will receive an email. The employee will have to log in to self service and acknowledge the review was conducted. This step serves as the employee signature.

☑ You have successfully marked the review held for your evaluation.

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:	434
Manager:	Emily Smith	Status:	Review Held

Document Progress

Step	Status	Due Date	Action	Next Action
Performance Criteria	✔ Completed	05/30/2016	View	
Review Self Evaluation	✔ Completed	06/16/2016	View	
Complete Manager Evaluation	◑ Review Held	07/16/2016	View	Acknowledge

Return to Select Documents

See next page, if your employee refuses to sign their evaluation.

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19. If your employee refuses to sign the evaluation, the manager can do so by clicking on acknowledge and selecting the appropriate reason below.

The status of this evaluation is Review Held. In this status, you may enter comments in the Manager Comments section, if applicable.

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

If you need to acknowledge the evaluation for the employee, select the Acknowledge button and select a reason why you are acknowledging the evaluation for the employee.

Save   Acknowledge Review   🖨 ▭ 📊   Return to Document Detail

Performance Document - Annual Performance Review

Acknowledge Evaluation for Employee

You have chosen to acknowledge the performance evaluation for the employee.

◉ **Manager Override**
○ **Employee Refused**

To confirm that you would like to acknowledge the performance evaluation, select the OK button.

OK   Cancel

20. After the employee acknowledges the review has been held, the manager will receive an email to complete the evaluation process.

Current 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:**	434
Manager:	Emily Smith	**Status:**	Acknowledged

Document Progress

Step		Status	Due Date	Action	Next Action
Performance Criteria	✔	Completed	05/30/2016	View	
Review Self Evaluation	✔	Completed	06/16/2016	View	
Complete Manager Evaluation	◐	Acknowledged	07/16/2016	View	Complete

Return to Select Documents

The status of this evaluation is **Acknowledged**. In this status, you may enter comments in the Manager Comments section, if applicable.

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

If approval is required and you are ready to submit the evaluation for approval, select the Submit for Approval button to route the document through the appropriate approval process. If approval is not required then select the Complete button.

| Save	Complete		Return to Document Detail

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21. You will be taken to two more screens to confirm the evaluation is complete. Once you click on "Complete" and "OK" the evaluation is concluded.

Performance Document - Annual Performance Review

Complete Document

You have almost finalized your evaluation.

To confirm that you would like to mark the evaluation as completed, select the Complete button. Do not complete this evaluation until you have finalized each section.

Complete   Cancel
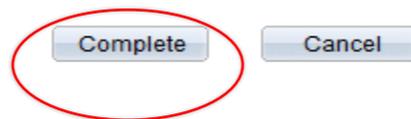
Performance Document - Annual Performance Review

Complete Document Confirmation

The performance evaluation is finalized and marked as "Complete".

OK