Human Resources
Division of Administration & Finance

Performance Evaluation

EMPLOYEE SELF EVALUATION GUIDE

UH Human Resources - Compensation

Select the Performance Module

The Performance module automatically opens up to your "Current Documents"
Select the displayed box; this will open your current ePerformance document so that you can complete your Self Evaluation.

In the Steps and Tasks pane, you can see where your document is at in the process and what steps and tasks are still needed.
The document automatically opens up to the phase it's currently in.

You'll need to go through each of the sections below to assign a rating and enter comments on the individual items.
Please note that Sections 3 and 4 are both located on the Competencies Tab

TAB	Section To Be Completed
GOALS	Section 1 - Employee Goals
RESPONSIBILITIES	Section 2 - Responsibilities
COMPETENCIES	Section 3 - Competencies
COMPETENCIES	Section 4 – Customer Service

Select the Goals Tab

The items will be condensed, click "Expand" to expand all items

Click the drop down arrow to assign a rating for this individual goal.

1 - Needs Improvement

2 - Generally Meets Expectations

3 - Achieved Expectations

4 - Exceeds Expectations

<mark>*See Rating Definitions on Last Page of Manual.</mark>

Enter your comments (if any) for this individual goal in the Employee Comments box.

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Goals | Responsibilities | Competencies | Overall

▼ Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

⊙ Expand | ⊙ Collapse

▼ **Goal 1: GOAL 1**

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating   [⌄]   0.00 📋

                                 1-Needs Improvement

Employee Comments   2-Generally Meets Expectations   **B** *I* U   ≡ ≔ A ▾ 🄰 ▾ ▦

        Writing Tools   3-Achieved Expectations

                               4-Exceeds Expectations

I met this SMART goal by completing the goal by the established deadline.

Once you're done with this goal rating and employee comment, continue these same steps for each remaining item (Goal 2, Goal 3, etc..).

Once you've finished rating each Goal, select the Calculator icon in the Goals Summary section.
This will calculate the ratings assigned for each Goal and display the "Goals Summary Employee Rating".

You can also include additional overall comments for your Goals section as a whole.

Goals Summary

Summary Weight	20 % (not less than 10%)
Employee Rating	3-Achieved Expectations 3.50

Employee Comments

Employee can enter additional comments regarding the goals that were set for them if they'd lke.

▼ Audit History

Created By	Krista McElroy	06/11/2018 1:41:50PM
Last Modified By	Angelica Pickles	06/11/2018 3:05:15PM

**Below is an example of the Goals Section with all Ratings and Comments entered.**

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▼ **Goal 1: GOAL 1**

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating [3-Achieved Expectations ▼] 3.00 📑

Employee Comments

Writing Tools

| Font ▼ | Size ▼ | B I U | ☰ ☰ A▾ A▾ |

I met this SMART goal by completing the goal by the established deadline.

Created By Daisy Duck   06/11/2018 2:38PM

▼ **Goal 2: GOAL 2**

Description : Manager adds SMART goal here.

Employee Measurement : Manager can include how they'll be measuring the employee on the SMART goal they've established.

Employee Rating [4-Exceeds Expectations ▼] 4.00 📑

Employee Comments

Writing Tools

| Font ▼ | Size ▼ | B I U | ☰ ☰ A▾ A▾ |

I exceeded this SMART goal by completing the goal before the established deadline.

Created By Angelica Pickles   06/11/2018 2:52PM

Goals Summary

Summary Weight   20 %   (not less than 10%)

Employee Rating 3-Achieved Expectations   3.50 📑 🖩

Employee Comments

| Font ▼ | Size ▼ | B I U | ☰ ☰ A▾ A▾ |

Once you've finished with the GOALS section select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation.

Now that you've evaluated all of your Goals, you're ready to complete Section 2 - Responsibilities.

Select the "Responsibilities" Tab.
The items will be condensed, click "Expand" to expand all items

Repeat the same process as you did in Section 1 - Goals.

Enter a Rating for each Responsibility.

Enter a comment (if needed) in each Responsibilities "Employee Comment" section.

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation.

Once you've entered Ratings and/or Comments for each individual Responsibility, select "Collapse".
The individual Responsibilities will condense.
Select the Calculator icon in the Responsibilities Summary section.
This will calculate the ratings assigned for each Responsibility and display the "Responsibilities Summary Employee Rating".

You can also include additional overall comments for your Responsibilities section as a whole.

Once you've finished with the RESPONSIBILITIES section select "SAVE" in the top right hand corner of your document.
Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation.

Now that you've evaluated all of your Responsibilities, you're ready to complete Section 3 Competencies and Section 4 Customer Service.
Both of of these Sections are located on the "Competencies" Tab.

Select the "Competencies" Tab.
The items will be condensed, click "Expand" in each Section (Competencies / Customer Service) to expand all items.

Repeat the same process as you did in Section 1 - Goals and Section 2 - Responsibilities.

SECTION 3 - COMPETENCIES
Enter a Rating for each Competency item.
Enter a comment (if needed) in each Competencies "Employee Comment" section.

Once you've entered Ratings and/or Comments for each individual Competency, select "Collapse".

The individual Competencies will condense.

Select the Calculator icon in the Competencies Summary section.

This will calculate the ratings assigned for each Competency and display the "Competencies Summary Employee Rating".

SECTION 4 - CUSTOMER SERVICE
Enter a Rating for each Customer Service item.
Enter a comment (if needed) in each Customer Service "Employee Comment" section.

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▼ Section 4 - Customer Service
  ⊙ Expand | ⊙ Collapse

▼ **Responsiveness**

Description : Responsiveness - the ability to build and maintain customer satisfaction through providing timely responses to inquiries, assignments and other deliverables.

Employee Rating [3-Achieved Expectations ▼]   3.00 📋

Employee Comments

Writing Tools

[⤢ ◄ ► | Font ▼ | Size ▼ | **B** *I* U | ≔ ≔ A▾ A▾ | ▲]

Employee can enter a comment here for this Customer Service Rating.

Created By Angelica Pickles   06/11/2018 2:57PM

▼ **Knowledge of Work**

Description : Knowledge of work - the individual is well versed in his/her own expertise as the position requires them to be.

Employee Rating [3-Achieved Expectations ▼]   3.00 📋

Employee Comments

Writing Tools

[⤢ ◄ ► | Font ▼ | Size ▼ | **B** *I* U | ≔ ≔ A▾ A▾ | ▲]

Employee can enter a comment here for this Customer Service Rating.

Created By Angelica Pickles   06/11/2018 2:57PM

Customer Service Summary

Summary Weight   20 %   (not less than 10%)

Employee Rating   0.00 📋 🖩

Once you've entered Ratings and/or Comments for each individual Customer Service item, select "Collapse".

The individual Customer Service items will condense.

Select the Calculator icon in the Customer Service Summary section.

This will calculate the ratings assigned for each Customer Service item and display the "Customer Service Summary Employee Rating".

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

You've now evaluated all of your Goals, Responsibilities, Competencies and Customer Service items.
Now select the "Overall" Tab.
This is where your Overall Performance Review Rating will be.

Click the "Calculate All Ratings" blue icon to calculate your Overall Employee Rating.
You can also include additional overall comments for your overall Performance Review.

Select "SAVE" in the top right hand corner of your document.
Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation.

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Daisy Duck

Job Title	Admnstr, Business, Asst	Manager	Angelica Pickles
Document Type	Performance Document	Period	01/01/2018 - 12/31/2018
Template	UH Staff Performance	Document ID	38622
Status	Evaluation in Progress	Due Date	12/01/2018

▼ **Employee Data**

Employee ID	0086140		
Department	H0155		Business Services
Years of Service	21 Years	3	Months
Years in Job	1 Years	7	Months
	Rating History		

✅ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

📋 Long Format | 🧮 Calculate All Ratings

| Goals | Responsibilities | Competencies | Overall |
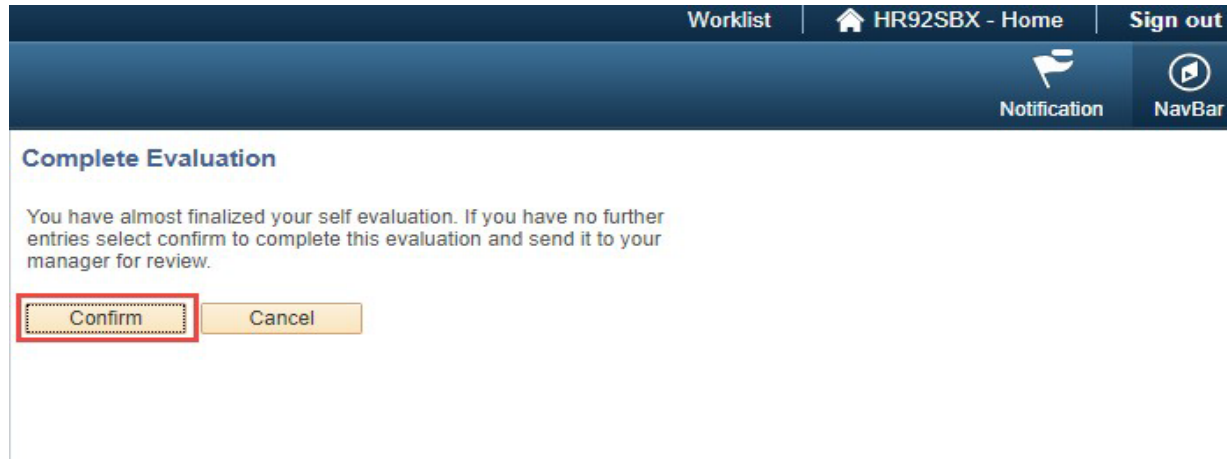
BEFORE FINALIZING YOUR SELF EVALUATION, ENSURE YOU'VE ENTERED RATINGS FOR EACH ITEM IN EACH SECTION.

TAB	Section
GOALS	Section 1 - Employee Goals
RESPONSIBILITIES	Section 2 - Responsibilities
COMPETENCIES	Section 3 - Competencies
COMPETENCIES	Section 4 - Customer Service

Now that you've completed your Self Evaluation and verified all items had ratings, you're ready to finalize your Self Evaluation.

Select "Complete" in the top right hand corner of your document next to Save.
Once you select Complete, you'll be re-directed to a confirmation page.
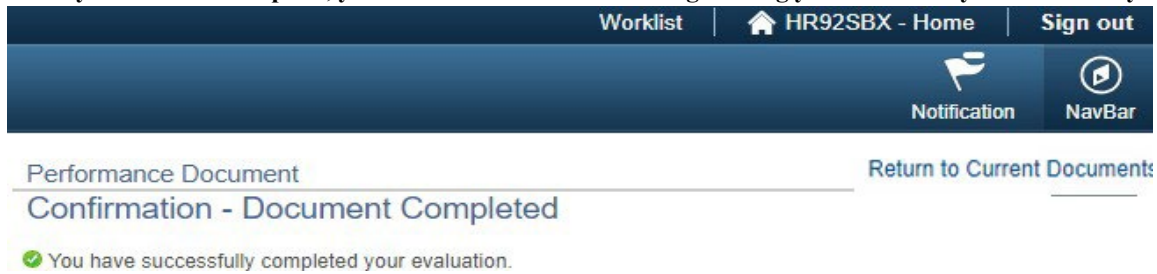
Once you select Complete, you'll be re-directed to a confirmation page.
Select "Confirm" to finalize the document.

Once you selected Complete, you'll see a confirmation message letting you know that you successfully completed your Self Evaluation.

Select "Return to Current Documents".

You've now completed your Self Evaluation.

If you want to view your completed Self Evaluation,
Select the displayed box to open your document.

In the Steps and Tasks pane, you'll see a green check mark next to Complete Self Evaluation.
You'll also see a status on your document that shows "The document status is Completed".

RATING DEFINITIONS

1 - Needs Improvement (1.0 - 1.79)	Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required.
2 - Generally Meets Expectations (1.80 - 2.79)	Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required.
3 - Achieved Expecatations (2.80 - 3.79)	Meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position required. Meets deadlines. Frequently exceeds in one or more established job expectations.
4 - Exceeds Expectations (3.80 - 4.0)	Consistently exceeds departmental performance to a degree that is obvious to supervisor, customers, and peers. Consistently excels in demonstrating the knowledge, skills, and abilities that result in the effective performance of the position requirements. Consistently serves as a role model to others. Truly outstanding level of contribution (well beyond position requirements) during the entire performance period.