Staff Performance Evaluations

Electronic Evaluation Instructions

Introduction

In an effort to streamline the evaluation process while making it more user friendly and supporting sustainability initiatives, we have transitioned into an electronic performance management system.

The process will be completely paperless and submission will be electronic and secure. During the process you will have the opportunity to assign your employees to other supervisors within your department.

The system will work with Internet Explorer, Firefox, Mac, Tablets, Smartphones...etc.

Training sessions/resources will be available electronically and individual training is available.
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Login Instructions

- You will be provided with a link to the evaluation supervisor login screen.
- Your username is your UIN and your password will be provided to you by email.
- If you lose, forget or feel that your password security may be compromised; you can contact Human Resources to have the password reset.
Department Head Options

- As the department head you will be able to see all of the employees within your department/division.

- You will also be able to track the progress of their evaluations even if you are not their immediate supervisor.

- In this capacity you will be able to edit/designate supervisors within your department/division.

- Each department head and supervisor will be able to toggle between their supervisor view/change menu and the employee details menu.
• The supervisor view/change menu is where you can view and edit an employee's supervisor.

• The employee details menu is where you will go to start an evaluation and acknowledge the review of an employee's position description.
**Employee Details Menu**

```
Name     UNI    Department    Form Status    View/Edit Form Details    Submitted    HR Acknowledged
John Smith LOGOUT
```

**Designating Supervisors within the Same Department**

- By default every employee will have the department head as their designated supervisor.
- If you have an employee that supervises other employees within your department, you will need to designate them as the supervisor for each employee that they will evaluate.
- To do this you will need to be in the Supervisor View/Change Menu.
- On the right hand side of each employee name is a “Supervisor Name/Change” button that you click. When you do this, you will be taken to a new screen with the employee’s name and there will be a drop down option to select a supervisor from the departmental employee list.
- Make the supervisor selection and hit the save button.
Supervisor Menu

- After you have made your supervisor changes, the new supervisors will be able to log into the supervisor website with their own passwords.

- When they log in, they will only be able to see the employees that you have assigned to them. A supervisor can only view their employee’s supervisor, but cannot change who the supervisor is.

- Only the department head will have the access to change supervisors.

Completing the Evaluation

- In order for a supervisor to begin an evaluation, they will click on the "Evaluation" button to the right of each employee name from the "Employee Details Menu".

- The form used (exempt or non-exempt) is determined automatically by title.

- The supervisor will need to designate the evaluation as either a 6 month or an annual evaluation. All other information (employee name, evaluation period, UIN, title, department, supervisor and years in position) are pre-filled based on the employee's personnel records.

- If the evaluation is a 6 month, please provide the evaluation period date range.
Employee Details Menu

John Smith

Click To View/Change Supervisor

Completing the Form

- The supervisor will use the drop down box to designate which type of evaluation they are completing (6 month or Annual).

- If it is an annual evaluation, the date range is automatically entered as 01/01/2014-12/31/2014.

- If it is a 6 month evaluation, the date range will need to be filled in by the supervisor.

- You complete the form by selecting a rating for each performance factor.
Texas A&M University - Kingsville
Performance Appraisal Form (Exempt)

Evaluation Period: [Start Date] - [End Date]
Employee Name: [Name]
Title: [Title]
Department: [Department]
Supervisor: [Supervisor]
Duration: [Duration]
Years of Service: [Years of Service]

The following ratings are to be used in evaluating each Performance Factor:

- Far Below Expectations: Employee does not exhibit willingness or ability in this performance factor
- Below Expectations: Employee occasionally exhibits willingness or ability in this performance factor
- Meets Expectations: Employee performs at an acceptable level
- Exceeds Expectations: Employee often shows willingness and ability in this performance factor above the acceptable level
- Far Exceeds Expectations: Employee's ability to show willingness and ability in this performance factor well above the acceptable level

Leadership Skills - Possesses overall skills and abilities necessary to achieve assigned goals within the organization.

- Far Below Expectation
- Below Expectation
- Meets Expectation
- Exceeds Expectation
- Far Exceeds Expectation

Evaluation Comments: [Comments]

Communication and Public Relations - Communicates effectively both internally and externally.

- Far Below Expectation
- Below Expectation
- Meets Expectation
- Exceeds Expectation
- Far Exceeds Expectation

Evaluation Comments: [Comments]

- If you make a rating selection of Meets Expectations" a comment is optional.
- If you select any ratings of above or below "Meets Expectations" a comment is required.
- If you do not make a comment where it is required, you will be prompted to do so before it will allow you to save your progress.
- Once the supervisor has completed filling out the form they should meet with the employee to discuss their performance in the past year, discuss the employees goals for the next year and review the employee's position description.
• S.M.A.R.T. goals will be completed electronically within the online form. The supervisor may choose to have the employee prepare individual goals prior to the meeting.

• The position description review acknowledgment will be completed within the evaluation form. By signing the evaluation both the supervisor and employee are attesting that they review process has taken place. There will be no need to attach or forward any additional documents.

• During the meeting the evaluation can be changed or revised by the supervisor.

• The evaluation cannot be changed after the employee has signed their evaluation and it has been submitted.

• If the employee disagrees with their evaluation, they will have the opportunity to request a review by a higher authority. The employee is required to submit a written response to the evaluation detailing their concerns.

• Human Resources will contact the employee by email within 10 days of receipt of a request for higher review.
Position Description Review

Overall Rating:
- Far below expectations
- Below expectations
- Meets expectations
- Exceeds expectations
- Far exceeds expectations

Evaluator's Comments:

Position Description Review Acknowledgement

Instructions:
- Review the employee's position description and discuss any changes for the upcoming year.
- If any changes need to be made to an employee's position description, you can only evaluate them on the previous version.
- If it has been more than 6 years since the last appraisal OR if the employee has been transferred or promoted, the employee must sign and return the performance evaluation with my supervisor's comments. It does not necessarily mean that I agree with the evaluation comments. I understand that I may attach written comments, if desired.

Administrative

I disagree and request a review by a higher authority.  

The employee's password will be changed by email within 30 days of receipt of this request by Human Resources.

Employer's password:  

Supervisor's Name:  

Director/Chair/Dean/Vice-President/President:  

[Submit button]

Saving/Tracking/Submitting an Evaluation

- Throughout the entire process, you will be able to save your progress. The system will time out after 30 minutes and you can lose any unsaved information. It is highly encouraged that you save frequently.

- If you wish to clear the rating selection on a particular performance factor, you can utilize the clear selection button.

- If you make a rating selection that requires a comment, you will need to make that comment before saving. A warning will be given if no comment is made and the evaluation will not save until a comment is entered or the rating selection is cleared.

- The performance factor(s) lacking a comment will be highlighted in yellow.

- There is a progress calculator (%) built in to each evaluation. So the supervisor and/or department head can see at anytime the progress of their employee's evaluations.
• When the evaluation, position description review and supervisor name fields are complete, the progress calculator will be marked as 100%.

• A Director, Chair, Dean, Vice President or President acknowledgement is required on the evaluation before it can be submitted to HR. The supervisor will need to notify their Director, Chair, Dean, Vice President or the President when the employee's evaluation is complete and ready for their review. This should happen before the face to face meeting with the employee.

  (If the supervisor is one of the above, then they will need to enter their name in both boxes)

• Once the employee and supervisor(s) have completed the evaluation, goals and position description review, the evaluation can be submitted to HR for acknowledgement.

• Submission to HR can only be done when the employee is meeting with the supervisor and the employee enters his/her password.
Password Entry/Submission

Employee's password: ********** Employee: 1
Supervisor's Name: John Smith
Director/Chair/Dean/Vice-President/President: John Smith

SAVE | Submit to HR

- Once the evaluation is submitted, it cannot be edited unless the supervisor requests for it to be returned from HR.

- If changes need to be made after the evaluation is submitted, please contact Human Resources.

- After HR has reviewed the evaluation and goals are received, the evaluation will be saved electronically and copies will be available upon request.
### Progress Calculator

John Smith

<table>
<thead>
<tr>
<th>Name</th>
<th>UIN</th>
<th>Department</th>
<th>Form Status</th>
<th>View/Edit Form Details</th>
<th>Submitted</th>
<th>HR Acknowledged</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee 1</td>
<td>123000001</td>
<td>Test Department</td>
<td>100%</td>
<td>Evaluation/123000001</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Employee 2</td>
<td>123000002</td>
<td>Test Department</td>
<td>50%</td>
<td>Evaluation/123000002</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Employee 3</td>
<td>123000003</td>
<td>Test Department</td>
<td>50%</td>
<td>Evaluation/123000003</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Employee 4</td>
<td>123000004</td>
<td>Test Department</td>
<td>50%</td>
<td>Evaluation/123000004</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Employee 5</td>
<td>123000005</td>
<td>Test Department</td>
<td>100%</td>
<td>Evaluation/123000005</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

Click To View/Change Supervisors

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Any questions can be directed to Human Resources.