Staff Evaluation Steps Supervisor

Set Competencies & Goals
- In this step click the begin button to next to Set Competencies and Goals, this will create the document.
- Ensure both Competencies are correct per Job Description and Goals are correct per employees Goal Plan.
- Look over competencies and goals and set weights for each competency and goal.
- Competencies with an * will default in with a weighting of 10% each, however you can adjust this weighting.
- Goals should pull in from the Goal plan for the correct Review Period, one goal “Performance of Essential Duties” will default to 50% this also can be adjusted as needed.
- When done click Submit.

Conduct Self Evaluation
- In this Step the employee will complete a self evaluation and score themselves on each competency and goal as well as provide comments if desired.
- Caution: The employee can adjust the weights you set in the previous step, ensure you review competency and goal weightings after the employee completes the self evaluation and submits to the supervisor.
- You will receive a notification when employee submits their Self-Evaluation.

Manage Participants
- Optional step that will allow you to add a an additional supervisor.
- Used when employee reported to another supervisor for the majority of the Review Period or employee works on a separate shift, if not needed continue to next step.

Conduct Evaluation
- Here the supervisor rates Competencies and goals of the employee.
- Best practice is to complete document, print it out and conduct in-person review with employee. At this step the supervisor is still able to make edits and reprint for employee to see. Continue to do this until document is finalized.
- If the employee wishes to make additional comments or edit previous comments click “Return to Worker”
- Once document is at a state where you feel you want to proceed click “Submit” this will record the information but not allow the employee to view the document the next step does that.

Share Performance Document
- Here you will share the document electronically you have two choices Share and Release or by using the drop down arrow Share and Retain.
- Share and Retain allows the supervisor to share the document electronically with the employee but still maintain or retain the capability of editing. The employee will be able to see the document by clicking “view” in their document tasks. The document will remain in a state of share and retain, until you click Share and Release.
- Share and Release: clicking this, releases the document to the employee for viewing. Since you have released it, you can no longer edit the document and must contact Human Resources to move the document backward for editing.

Employee Reviews Document
- Employee reviews electronic copy of document in HCM
- To see document click “View” next to Conduct Self Evaluation
- No further actions required from employee to move document forward next step accomplished by supervisor

Confirm Review Meeting Held
- Click Begin next to Confirm Review Meeting was Held a pop-up window will open.
- In pop-up, enter date that in-person review took place and click ok.
- Next to Confirm Review meeting Held you will see that date that you completed the task not the date you conducted the in-person review.
- The employee will receive notification that you completed this step, they will have to go into the system to confirm that the meeting was held. Once they have accomplished this step the document will automatically submit through workflow to the next step of Next Level Supervisor Approval.

Confirm Review Meeting Held
- Employee confirms review meeting was held, Supervisor will receive notification when the employee acknowledges the review

Supervisor Approval
- Every Performance Evaluation requires the next level supervisor to approve the document the document is not considered complete until it is approved.
- Submit the document by clicking Begin next to the task Next Level Supervisor Approval.
- The next level supervisor will receive notification once the document is submitted to them however it is best practice to follow up with them outside the system.