

**Manager Self Service (ESS/MSS)** – Evaluator develops and scores the employee’s evaluation.

**Criteria Maintenance** – Controls what you see in the table.

- If you don’t see employees listed – check to ensure the “Status Overview” tab is selected, the dates are current, the employee is set to “Employees to Appraise” and/or remove the numbers in “Category Group ID” and “Category ID.”

**Create Multiple** - Used to create a new “template/employee evaluation” or to assign a previously developed evaluation to other employees doing the same job.

- Category ID – Pick or confirm the type of template you want to create or copy
- Valid From – the first day of the review period.
- Valid To – the last day of the review period (the day before the next review date).
  - Example – today is Aug 28 2021, employee has a review date in Sept. 1. Create an evaluation for the employee from Sept 1, 2020 to Aug. 31, 2021.
- Use “Ctrl” key to select multiple employees when assigning a template to other employees.

### Annual Evaluation Steps to Start Process

1. Create Employee Review\Template. (*In Preparation*) **Refer to Unit 2, Lesson 1, on page 17.**
2. Verify Employee information. Select Define Objectives and Continue. **Refer to Unit 2, Step 23, on page 33.**
3. If a substitute is creating the evaluation, they must be sure to change the “Manager” field from their name to the actual Manager/Supervisor’s name. **Refer to Unit 2, Steps 19a-22, pages 30-33.**
4. Define Objectives - Enter the job title and job summary, determine essential job duties, job standards and weighting for each essential job duty. (*In Planning*) **Save & Exit. Refer to Unit 2, Steps 24-36 on pages 33-39.**
5. Review the online evaluation with the employee and set goals. **Save & Exit**
6. Manager/Supervisor receives an email stating that the employee’s evaluation is due within 60 days. The Manager/Supervisor will notify the employee to complete their self-evaluation by selecting “Employee Notification of Self Evaluation”. (*In Review*)
7. Employee receives an email stating that it is time to complete their self-evaluation. (*In Process*)
8. Once the Employee completes their self-evaluation, their Manager/Supervisor and substitute(s) receive an email stating this is done.
9. Manager/Supervisor rates the employee’s performance, adds comments (examples) and attachments. **Save & Exit Refer to Unit 4, Steps 1-9 on pages 44-50.**
10. Manager/Supervisor schedules a meeting and reviews evaluation with the Employee. **Unit 4, Step 10, Page 50.**
11. Manager/Supervisor confirms the evaluation has been reviewed with the employee. (*In Process/Employee Review*) **Refer to Unit 4, Steps 11-12, on page 51.**
12. The employee receives an email requesting they electronically sign off on their evaluation. This confirms the employee met with their Manager/Supervisor and reviewed their evaluation. **Unit 4, page 51. (Completed)**
13. After completing the current evaluation, the Manager/Supervisor will reassign/copy the same evaluation to the employee for the upcoming year and copy current goals. **Refer to Unit 3 pages 40-43.**

### Assigning (Copy) Evaluation to New Hire, Current Employee or Other Employees

1. Select a previously created evaluation for an employee that has same or similar duties.
2. Verify employee information.
3. Assign it to the employee by using Create Multiple.
4. Verify the employee’s information and update if necessary.
5. If job duties are different or changed, update each responsibility, standard, and weighting.

### 90 Day Evaluation Steps

1. Evaluator receives an email that the 90 Day evaluation is due; verify employee information. (*In Preparation*)
2. Evaluator scores evaluation. (*In Process*)
3. Review with Employee within the 90 window. (*In Process / Employee Review*)
4. Evaluator signs off on review. (*In Process / Employee Review*)
5. Employee receives email to remind them to sign off on the evaluation; employee signs off that they received the review, within the 90 day window. (*Completed*)
6. If probation is extended, create a new 90 Day with the extension dates. (*In Preparation*)

7. Manager/Supervisor receives email that employee has completed their self-evaluation; Manager/Supervisor scores evaluation. Save & Exit.
8. Review with Employee.
9. Manager Signs off on evaluation. (*In Process / Employee Review*)
10. Reassign/copy same evaluation to employee and set goals right after completing the current evaluation. Assign goals if needed.
11. Employee receives email to sign off on evaluation; Employee signs off that they received the evaluation. (*Completed*)
12. Repeat starting at step 2, and skip step 3.

#### **Assigning Evaluation to new hire, current employee or other current employees**

1. Select a previous created evaluation for an employee that has same or similar duties.
2. Verify Employee information.
3. Assign it to the employee by using Create Multiple.
4. If duties are similar but not same, change the essentials of the job duties, setting the standards and weighting the essentials.
5. Go to “Annual Evaluation Steps to Start Process” step 4.

#### **Status – 90 Day Evaluations**

- *In Preparation* – Verifying the employee’s information.
- *In Process* – The Manager/Supervisor now scores the evaluation. It stays in this status until the manager or supervisor reviews with employee in person.
- *In Process / Employee Review* – Employee reviewing and signing off that they received the evaluation.
- *Completed* – the employee has verified that they received the evaluation and the evaluation cycle is complete.

#### **90 Days Evaluation Steps**

1. Manager/Supervisor receives email that the 90 Day evaluation is due; Verify Employee Information. (*In Preparation*)
2. Manager/Supervisor scores evaluation. (*In Process*)
3. Review with Employee. (*In Process / Employee Review*)
4. Manager Signs off on the evaluation. (*In Process / Employee Review*)
5. Employee receives email to remind them to sign off on the evaluation; Employee signs off that they received the evaluation (this must be completed within the 90 day period). (*Completed*)

#### **90 Days Evaluation Extension Steps**

1. Create a new 90 Day with the extension dates. (*In Preparation*)
2. Manager/Supervisor scores evaluation at the end of the extension period. (*In Process*)
3. Review with Employee.
4. Manager Signs off on the evaluation. (*In Process / Employee Review*)
5. Employee receives email to remind them to sign off on the evaluation; Employee signs off that they received the evaluation (*Completed*).