It is time for all exempt and non-exempt staff employees to complete their annual performance evaluation and there are major changes to the evaluation process this year. Please read through this document carefully and follow the instructions.

The evaluation period for non-exempt (bi-weekly) employees is April 1, 2014 through March 31, 2015. Performance evaluations should be completed and submitted to your immediate supervisor no later than Thursday, April 30, 2015 with the entire evaluation process completed and submitted to Human Resources no later than Friday, May 29, 2015.

The evaluation period for exempt (monthly) employees is May 1, 2014 through April 30, 2015. Performance evaluations should be completed and submitted to your immediate supervisor no later than Friday, May 29, 2015 with the entire evaluation process completed and submitted to Human Resources no later than Tuesday, June 30, 2015.

Human Resources will conduct refresher training for supervisors, managers, and faculty members who supervise exempt and non-exempt staff, as well as training for new employees hired after March 2014. Supervisors who were hired or promoted during this review period and supervise either exempt or non-exempt staff (not students) will be offered separate training providing information on how to prepare, plan, and conduct performance evaluations. If you are interested in any of these training opportunities, please contact Erica Myers at extension 4120.

You will complete your performance evaluation for 2014/2015 using the program we have used in the past. After this evaluation period, we will be converting to the new PA 7.0 system. This year you will not complete your future goals in PA 5.8 but will start to transition by entering your goals for 2015/2016 into PA 7.0. In addition, after this evaluation period closes, you will no longer have access to any reviews in the old 5.8 system so if you want to retain a copy, you must either print them or save them to a location of your choosing.

In order to access your 2014/2015 evaluation go to the following site https://pa133.peopleadmin.com/hr/ or from the Human Resources website main page select the link on the bottom right that reads Applicant Tracking 5.8 (Old Version). After logging into the system, you may select “View My Position” under the “Position Description” header on the left. Select “View Summary” under your job title to view your job description.

To start your evaluation, select “Start Evaluation.” If you are bi-weekly, select “Non-Exempt.” If you are monthly, select “Exempt.” Only select “Active Evaluations” after you have “Saved” your evaluation at any status. Do not create more than one evaluation.

Supervisors, including faculty, cannot complete their section of the performance evaluation until the employee has submitted it to the Chair/Supervisor. Remember, the meeting between the employee and supervisor provides very important feedback and must occur before the performance evaluation is submitted to the Dean/Administrator.
Performance Evaluation Tutorials for exempt and non-exempt staff are available on the Human Resources webpage.

The non-exempt tutorial is located at:  
http://www.indstate.edu/humres/docs/Tutorialnon-exempt.pdf

The exempt tutorial is located at:  
http://www.indstate.edu/humres/docs/Tutorialexempt.pdf

The tutorials provide step-by-step illustrations to assist in the completion of the performance evaluation. In addition, FAQ’s are available on the HR webpage.

We are initiating our new system so once you have completed your 2014/2015 evaluation in the old 5.8 system, you will need to log into https://jobs.indstate.edu/hr/ or from the Human Resources website main page select the link on the bottom right that reads Applicant Tracking 7.0 (New Version).

Please enter your Campus User Name and Password into the new system.

Click on Go to Indiana State University Employee Portal as shown below.
This will bring you to the following screen.

![Employee Portal Image](image1)

This will bring you to your Action Item screen, click on Employee Creates Plan this will bring you to your Goals.

![Action Item Image](image2)

You can add as many goals as you need by simply clicking on the Add Entry at the bottom of the page. Each new entry is displayed at the end of the list so scroll down to enter each new goal. Your goals should be discussed with your supervisor and ready to enter into the new PA7.0 system prior to your evaluation review meeting.

![Add Entry Image](image3)
Once you have added all your goals you can click on Save as draft (which will allow you to come back to it after you have discussed your proposed goals with your supervisor or determined any additional goals)

or you can Click on next which will bring you to the Job Factors Page (Please review these factors as you will be rated on them for the next evaluation period)

Once you have completed entering your goals and reviewing your job factors, click on the complete button. NOTE: Once you select “Complete” and your supervisor approves the goals, you can’t change or add to the goals. Once you have completed your Goals Plan, your supervisor will be notified and your supervisor can Approve, Revise, or Return.

** If the supervisor returns the plan the employee will go back and make corrections, add additional goals, or change goals. If they revise the plan, they have added goals themselves. Once the employee reviews the changes, they will need to acknowledge and submit back to the supervisor.

When the supervisor approves the Plan, you are done and will not need to complete anything else until the next review period. At the appropriate time in 2016 you will be notified by email and will complete the self-evaluation.

Another feature of the new system is the ability to track your progress using “Project Notes” so instead of tracking items on paper, you can record your updates/notes electronically. Both the employee and the supervisor can enter notes that are private. The supervisor can’t see what the employee writes nor can the employee see what the supervisor writes. NOTE: Even though project notes are private, make sure the content is business appropriate as they could be discoverable if subpoenaed.
Please Note: Employees who do not complete their portion of the performance evaluation and send it to their Chair/Supervisor may not be eligible for the standard increase in November if one is approved.

Questions regarding performance evaluations should be directed to Human Resources at 4114.