Instructions for Performance Evaluation at the status of Chair/Supervisor Review Pending

1. Log in to the Performance Management System as Chair/Supervisor.

**NOTE: If you have more than one user type, look at the top of the screen to see which user type is active. If it does not say Chair/Supervisor, follow these steps to change your user type.

- Under the ADMIN heading, click on the "Change User Type" link
- Choose Chair/Supervisor
- Then click on "Change Group"

2. Under the EVALUATIONS heading, click on the "Active Evaluations" link. Scroll down to "Search Active Evaluations." Select "Check All" or the appropriate status and click "Search."
3. To select the evaluation for your review, Click on "View/Edit" beneath the position title.
4. Click the "Edit" button.
5. Review each tab and navigate by clicking on "Continue to Next Page."
6. You can save your work and return to the Performance Evaluation by clicking "SAVE AND STAY ON THIS PAGE" at any time. If you are going to be away from the evaluation longer than 10 minutes, be sure to save your work and logout of the system. This will prevent you from being timed out and losing any data.
7. The first tab is "Documents." The Chair/Supervisor may attach documents such as org charts, warnings, performance improvement plans, certificates of completion, etc.
8. Click on "Continue to Next Page."
9. The second tab is "Evaluation Details." Verify that "Other Users Who Need Access to this Evaluation" is correct and listed in the column on the right. If not, select the appropriate users and move their name to the column on the right. Verify that the Evaluation Type, Evaluation Begin Date and Evaluation End Date are correct.
    - Annual Non-Exempt evaluations begin April 1 and end March 31 of the following year.
    - Annual Exempt evaluations begin May 1 and end April 30 of the following year.
10. Click on "Continue to Next Page."
11. The third tab is "Current Goals, Objectives, and Plan." These are the goals that you and your employee created last year. You may do the following actions:
    - To view the employee's "Goals/Objectives," click on "View." (No edits allowed)
    - Comments may be added to the "Supervisor's Comments for Goals/Objectives" by clicking on "Edit" and "Save Changes."
    - To add a goal, click "Add New Entry." When finished, click "Save Changes" and then "Continue to Next Page."

12. The fourth tab is “Job Factors.” For the list of rating definitions click on the link “Please click here for a list of rating definitions” located above the first job factor. The Chair/Supervisor must rate the employee in each job factor category. Select “Not Applicable” (N/A) if a factor does not apply. Note: N/A’s are not used to calculate the overall score.
    - Supervisor and employee comments are **required** for “Outstanding Performance,” “Performance Needs Improvement,” and “Unsatisfactory Performance.” Supervisor comments are recommended for “Very Good Performance” and “Good Performance.”
    - When complete, click the “Calculate” button and the employee’s overall performance score will display.
    - When you have completed this section, click “Continue to Next Page.”
13. The fifth tab is “New Degrees and Certifications” and is view only.
    - When you have reviewed this section, click “Continue to Next Page.”
14. The sixth tab is “FUTURE Goals, Objectives, and Plan” (three to six goals are recommended ex: departmental attendance guidelines, training, etc.). You may do the following actions:
    - To view the employee’s “Goals/Objectives,” click on “View.” (No edits allowed)
    - Comments may be added to the “Supervisor’s Comments for Goals/Objectives” by clicking on “Edit” and “Save Changes.”
    - To add a goal(s), click “Add New Entry.” When finished, click “Save Changes” and then “Continue to Next Page.”
15. The seventh tab is “Rating Worksheet.” Enter the “Conference Date” (supervisor and employee meetings are **required**) and make any additional comments related the employee’s performance in the space provided. When you have completed this section, click “Continue to Next Page.”
16. You may select from the following actions:
    - “Save” – If additional time is needed to complete the performance evaluation.
    - “Submit to Employee for Review” – This will give the employee time to review your comments prior to the employee/supervisor meeting. After the meeting, the employee will return the performance review to you.
    - “Submit to Dean/Administrator” – Only select after the employee/supervisor meeting is complete, changes/additions/updates have been made to the performance evaluation and the performance evaluation is considered complete by you and the employee.
17. Click “Confirm” to finalize your submission. A green check mark should appear indicating that the evaluation has been successfully submitted.

If you have questions, please contact Human Resources at extension 4114.

Thank you,
Human Resources