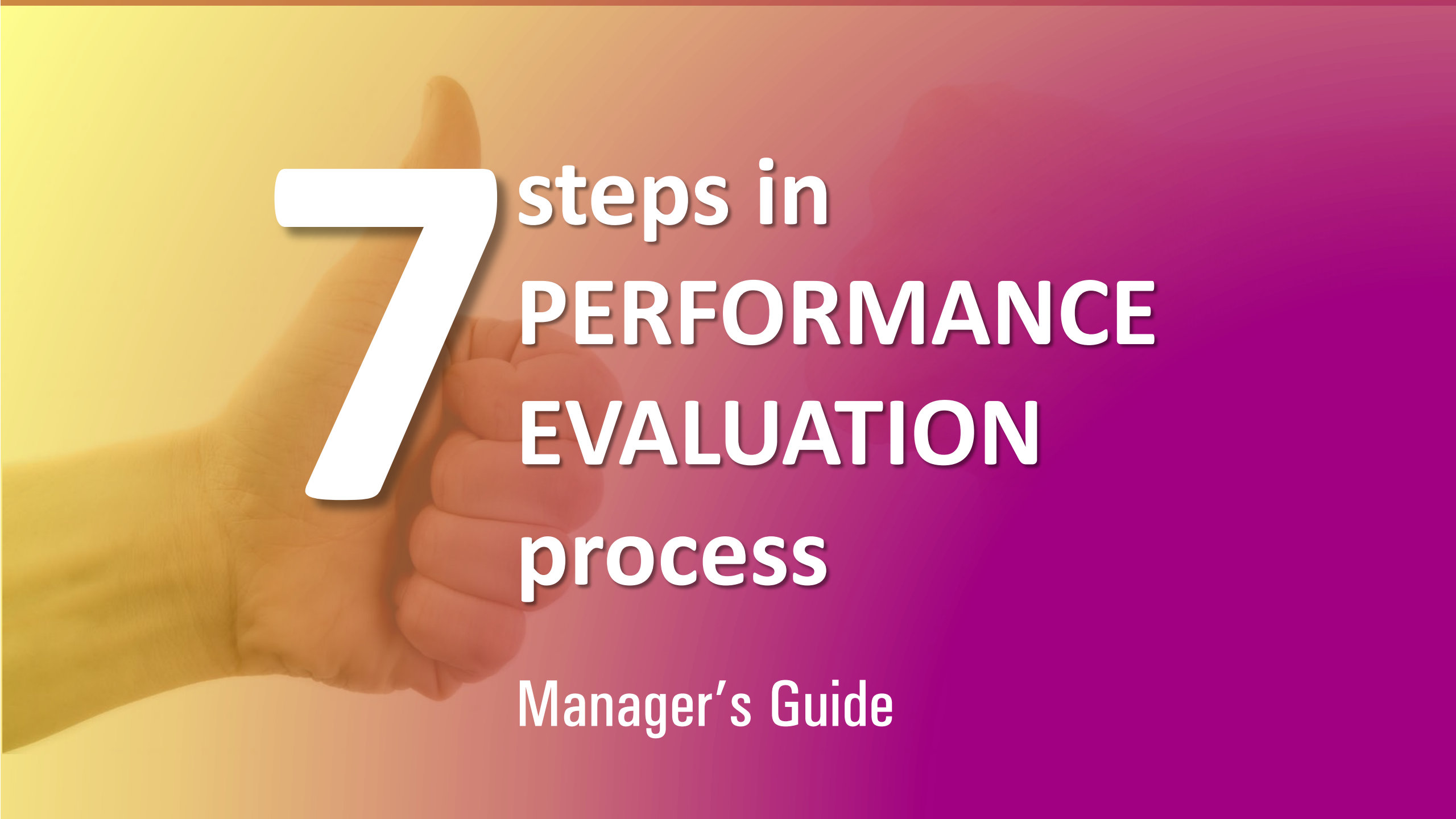
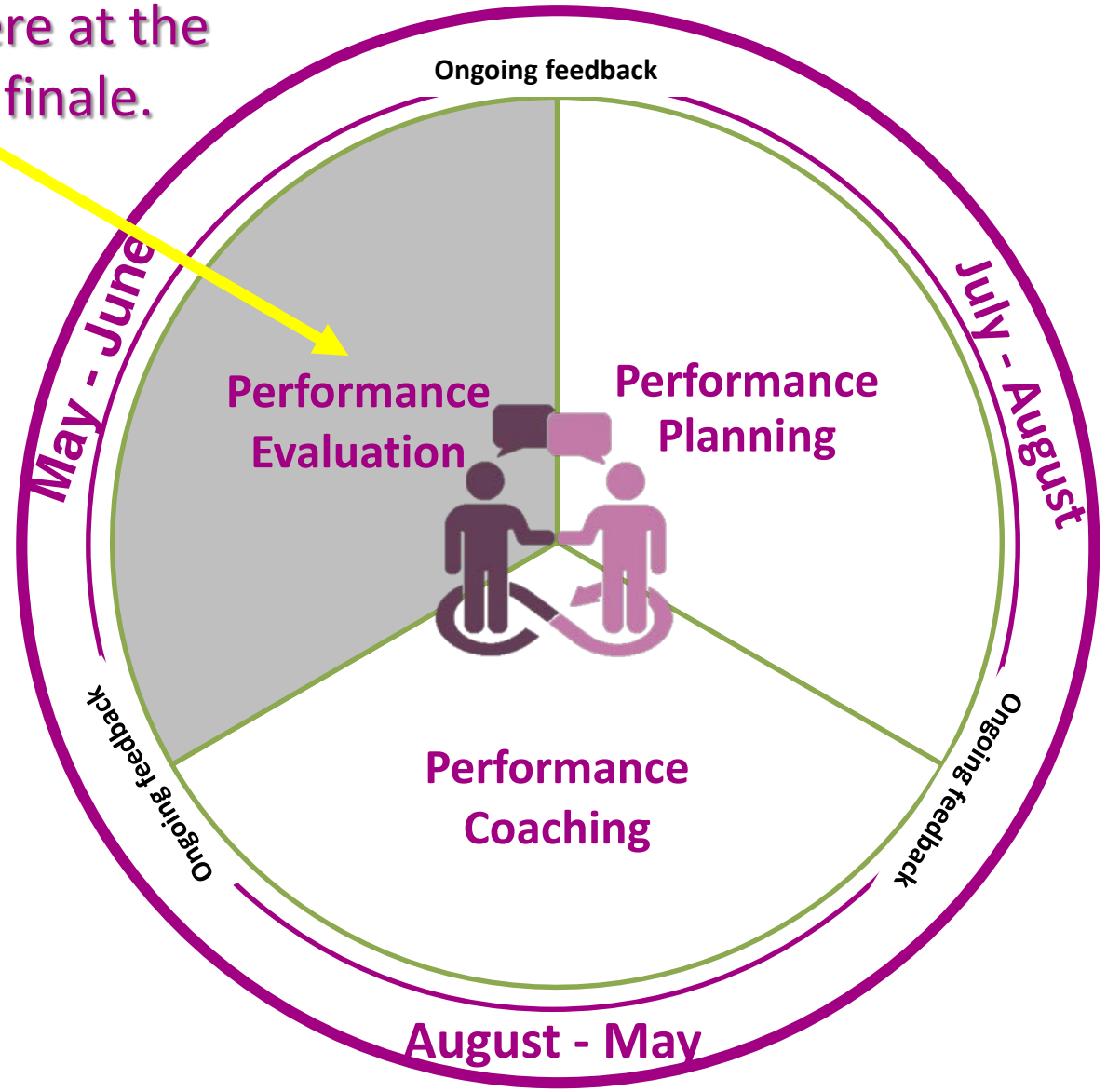


7 steps in PERFORMANCE EVALUATION process

Manager's Guide

You are here at the process finale.



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7 steps in PERFORMANCE EVALUATION process

1. Manager Checks the Plan
2. Employee Self Evaluates
3. Manager Evaluates Employee
4. Reviewing Manager + HR Review
5. 1:1 Meeting (Manager and Employee)
6. Employee Acknowledges Review
7. Manager Completes Evaluation

Performance Evaluation Process deadline:
June 30, 2018

MANAGER CHECKS THE PLAN

- Manager ensures Performance Plan is complete in ePerformance for the employee to conduct a Self Evaluation.
- Manager conducts a due diligence on employee's performance.
- Manager informs employee to complete their Self Evaluation by an agency-specific deadline.

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Manager job aid

Step 1 – Check the Plan

Action	Instruction
Log into PeopleSoft and go to MSS	To access screen: Manager Self Service → Performance Management → Performance Documents → Current Documents

2

EMPLOYEE SELF-EVALUATES

- Employee assesses themselves on each goal, job responsibility, and Core competency by selecting the appropriate rating.
- Employee writes comments in sections if required by their agency.
- Employee notifies manager on completion of Self Evaluation.

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Employee job aid

Step 2 – Employee Self-Evaluation

Action	Instruction
Log into PeopleSoft and go to Self Service :	Access screen: Self-Service → Performance Management → My Performance Documents → Current Documents
Access the self-evaluation	Click “Annual Performance Review” link for the desired cycle.
Enter the form	Click “Start” on the “Complete Self Evaluation” line.
Sections 1-3: Enter comments	Scroll down to each performance expectation in Sections 1-3 and enter your comments.
Enter rating	For each performance expectation in Sections 1-3, enter your ratings of your own performance.
Repeat steps	Repeat the two steps above for each item in Sections 1-3.
Section 4 - Individual Development Plan (IDP) Enter comments:	For each item in your IDP enter comments on your progress and achievements. Note: This section is not rated.
Complete Performance Plan	You may click “Save” if you wish to exit this phase to return later. OR You may click “Complete” to finish this step.
Confirm and finish	Click “Complete” again and then click “OK.”

MANAGER COMPLETES EMPLOYEE EVALUATION

- Manager gathers feedback from employee's peers and customers.
- Manager refers to the performance notes (made throughout the year).
- Manager avoids rating bias.

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Step 3 – Performance Evaluation

Action	Instruction
Log into PeopleSoft and go to MSS	To access screen: Manager Self Service → Performance Management → Performance Documents → Current Documents
Review employee self-evaluation	
Review the document	Click the "Annual Performance Review" link next to appropriate employee and cycle.
View	Click "View" on the same line as "Review Self-Evaluation."
Enter evaluation information	
Log into PeopleSoft and go to MSS	To access screen: Manager Self Service → Performance Management → My Performance Documents → Current Documents
Enter the document	Click the "Annual Performance Review" link next to appropriate employee and cycle.
Enter Comments and Ratings	Enter comments in each comment box to justify ratings from the drop down lists for each competency, goal, and/or job responsibility.

Step 3 – Performance Evaluation (continue)

Action	Instruction
Section rating	Click the “Calculator” button to calculate the average rating for each section (no weighting applied).
Calculate Overall Performance Rating	Click the “Calculate Rating” button calculate the overall rating for the entire evaluation (based upon section ratings and weights). Normal rounding rules apply.
Review IDP	Review the IDP and make comments on progress.
Submit	Click “Submit for Approval” to complete the evaluation.
Confirm	Click “Submit” to confirm your submission.

4

REVIEWING MANAGER AND HR REVIEW

- A reviewing manager reviews employee's Performance Evaluation. HR Reviews at this step if required by the agency.
- Manager engages the employee in a one-on-one meeting (before the final evaluation is shared with the employee).

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5

1:1 MEETING

- Manager and employee discuss employee's performance during the year.
- Additionally, manager discusses employee's goals and developmental needs for the coming year.

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Step 4 and 5 – Finalize Performance Document (after HR Approval)

Action	Instruction
Log into PeopleSoft and go to MSS	To access screen: Manager Self Service → Performance Management → Performance Documents → Current Documents
Choose employee	Click the "Annual Performance Review" next to the appropriate employee and cycle.
Enter the review	Click "Edit".
Enter the document	Click "Available for Review".
Performance Evaluation Meeting	Hold face-to-face meeting with employee to discuss the performance evaluation and ratings.
Mark review held	
Choose employee	Click the "Annual Performance Review" next to the appropriate employee and cycle
Enter the document	Click the "Mark Review Held" Link next to the appropriate employee.
Mark review held	Click "Review held".
Confirm	Click "OK".

EMPLOYEE ACKNOWLEDGES REVIEW

- Employee acknowledges (in Performance) or signs (if using paper-form) the Performance Evaluation.
- Manager may override the employee acknowledgment if required.

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Step 6 – Acknowledge Review Held

Action	Instruction
Log into PeopleSoft and go to Self Service :	Access screen: Self-Service → Performance Management → My Performance Documents → Current Documents
Access the document	Click “Annual Performance Review” for the desired cycle.
Acknowledge review	Click “Acknowledge Review” and then click “OK” on the next screen.

MANAGER COMPLETES THE EVALUATION

- Manager completes the Performance Management Process for the year by clicking on the “complete” button in ePerformance.

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Step 7 – Complete/Close the document

Action	Instruction
Log into PeopleSoft and go to MSS	To access screen: Manager Self Service → Performance Management → Performance Documents → Current Documents
Select an employee	Click “Annual Performance Review” Next to the appropriate employee and cycle.
Enter the document	Next to “Complete Manager’s Evaluation” click Complete.
Complete	Click the “Complete” button.
Confirm Complete	Click “Complete”.
Finish	Click “OK”.

Once Performance Evaluation for FY2018 is complete,

it's time to start Performance Planning for FY2019.