ANNUAL PERFORMANCE EVALUATION - QUICK GUIDE

(for more detailed instructions, please refer to evaluation instructions)

Log on at: www.fairmontstatejobs.com/hr

#1
Employee Completes Self-Evaluation

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#2
Supervisor/HM Review Pending
(Supervisor completes evaluation)

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#3
Conference Pending - EDITS ALLOWED

Outside PeopleAdmin, conference date is scheduled and held between supervisor and employee. This status gives both the opportunity to meet, discuss contents of evaluation, and make changes as desired. All changes must be made at this status; if necessary, employee edits first and then the supervisor/hm.

➢ ***IMPORTANT: AFTER THE CONFERENCE, THE SUPERVISOR/HM MUST SEND THE EVALUATION TO "EMPLOYEE CERTIFICATION (NO EDITS ALLOWED."***

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#4
Employee Certification - NO EDITS ALLOWED

(Employee certifies (dates) then sends to Supervisor)

↓

#5
Supervisor/HM Certification - NO EDITS ALLOWED

(Supervisor certifies (dates) then sends to HR)
-continued on back-

#1 Employee Completes Self Evaluation

Logs in with Employee user type

1. Under Evaluation heading, clicks **"begin new performance evaluation."**
2. Clicks **"Start Action," "Search,"** then **"Start Action."**
3. GOALS TABS: Clicks **"edit"** beneath the goal to enter achievement and actual completion dates. Then clicks **"Save Changes."**
4. Repeats this process for each goal that has been entered.
5. SET FUTURE GOALS TABS: Clicks **"add new entry"** to add additional goals for next year. Then clicks **"add entry."**
6. Completes each tab as applicable, clicking **"continue to next page"** to proceed through each of the tabs.
7. Once the summary page is reached, selects **"Submit to Supervisor/HM."** Clicks **"continue"** then **"confirm."**

#2: Supervisor/HM Review Pending

Supervisor will receive e-mail notification when evaluation reaches this status; logs in with Supv/HM user type

1. Under Evaluation Heading, clicks **"active evaluations."**
2. Clicks **"view"** under appropriate position title then **"edit."**
3. Completes each tab as applicable, clicking **"continue to next page"** to proceed through each of the tabs.
4. GOALS TABS: Clicks **"edit"** to comment on goals already entered by employee; also, may click **"add entry"** to add additional goals if desired.
5. JOB FACTOR TAB: After completing Job Factors tab, clicks **"CALCULATE"** in order for system to auto-calculate employee's rating.
6. RATING FOR ORG GOAL ACHIEVEMENT TAB: If employee is **NON-CLASSIFIED or FEAP**, completes this tab (once rating is assigned, clicks **"CALCULATE"** to factor in this additional rating score).
7. Clicks **"continue to next page"** until reaching the summary page, then sends to **"Conference Pending (Edits Allowed)."** Clicks **"continue"** then **"confirm."**

#3: Conference Pending - EDITS ALLOWED

Employee and Supv/HM will receive e-mail notifications when evaluation reaches this status. If edits are desired by employee and/or supervisor, the employee must complete his/her edits first.

SUPERVISOR/HM:

NOTE: After conference has been completed and all changes (if any) are finished, supervisor will complete the following steps:

1. Under evaluation heading, clicks **"active evaluations."**
2. Clicks **"view"** (scrolls down to review); if no supervisory edits are needed, selects radio button for "Employee Certification (No Edits Allowed)," then clicks **"continue, confirm."** If edits are needed, clicks **"edit"** and then makes desired changes.
3. Clicks **"continue to next page"** until reaching the summary page.
4. Selects **"Employee Certification (No Edits Allowed)."** Clicks **"continue"** then **"confirm."**

#4: Employee Certification - NO EDITS ALLOWED

Employee will receive e-mail notification; logs in with Employee user type

1. Under evaluation heading, clicks on **"Active Evaluations"**
2. Clicks **"view"** beneath the position title then **"edit"**
3. Clicks on the Certification tab; completes fields on this tab.
4. Clicks **"continue to next page"** until reaching the summary page; selects **"Submit to Supervisor/HM Certification (No Edits Allowed)."** Clicks **"continue"** then **"confirm."**

#5: Supervisor Certification - NO EDITS ALLOWED

Supervisor will receive e-mail notification; logs in with Supervisor/HM user type

1. Under Evaluation heading, clicks on **"Active Evaluations"**
2. Clicks **"view"** beneath the position title
3. Clicks the **"edit"** link above the evaluation status bar
4. Clicks **"continue to next page"** until reaching the Certification tab; completes fields on this tab.
5. Clicks on the summary page; selects **"Submit to HR."** Clicks **"continue"** then **"confirm."**

HR Review

HR completes review and changes status to either:

EVALUATION COMPLETED
or
EVALUATION COMPLETED-REQUIRES FOLLOW UP
or
SENDS TO NEXT LEVEL SUPERVISOR
(ONLY if overall evaluation score falls in the range of "Needs Improvement" or "Unsatisfactory")

EVALUATION COMPLETED

ALL USERS:

1. Completed evaluation may be viewed by various users by clicking the "historical evaluations" link found under the evaluations header.

2. Click "view summary" beneath the position title

#6
Sr Level HM Certification (No Edits Allowed)
OR
Cabinet/Provost Certification (No Edits Allowed)
OR
President Certification (No Edits Allowed)

#6: Sr Level HM or Cabinet/Provost or President Certification

1. Under Evaluation heading, clicks **"Active Evaluations."**
2. Clicks **"view"** beneath the position title
3. Clicks **"edit"** link above the evaluation status bar
4. Clicks **"continue to next page"** until reaching the **Certification tab.**
5. Enters review date and comments (if desired)
5. Clicks **"continue to next page"** until getting to the View Performance Summary page; selects **"Performance Evaluation Certified by Management,"** then **"continue"** and **"confirm."**

HR Review

HR will change the status to appropriate completed status and then start action on the "follow up" evaluation on the designated date of follow up.

EVALUATION COMPLETED

ALL USERS:

1. Completed evaluation may be viewed by various users by clicking the "historical evaluations" link found under the evaluations header.

2. Click "view summary" beneath the position title