

# **YEAR END REVIEW**

**SUPERVISOR TRAINING**

**SHAWNEE STATE UNIVERSITY  
HUMAN RESOURCES DEPARTMENT**



# Introduction

- It is now time to begin the Year End (Annual) Review. Employees will start the process by completing their Self-Evaluation. In order to provide more time for self-evaluations, we have moved the due date to April 15<sup>th</sup>.
- Supervisors, if you haven't already chosen a multi-rater, you may do so at this time; however, the use of multi-raters is optional. If you choose to use one, it is important that you use their input effectively. **Remember, you are not to tell the employee the name of the multi-rater.**
- Once the employee has clicked "complete", the supervisor will have access to both the employee's self-evaluation and the multi-rater's input (if applicable). He should then complete his/her evaluation of the employee. The supervisor will rate each competency and goal, along with providing comments/examples under the core competencies and the goals.
- Once completed, the Second Level Supervisor will review the evaluation to insure that the system was used properly. If the supervisor needs to make a change in the evaluation, he should ask the second level supervisor to click "Return" so he will have access to make those changes.
- Once approved by the Second Level Supervisor, the supervisor can schedule a Performance Review Discussion with the employee.

# Self-Evaluation

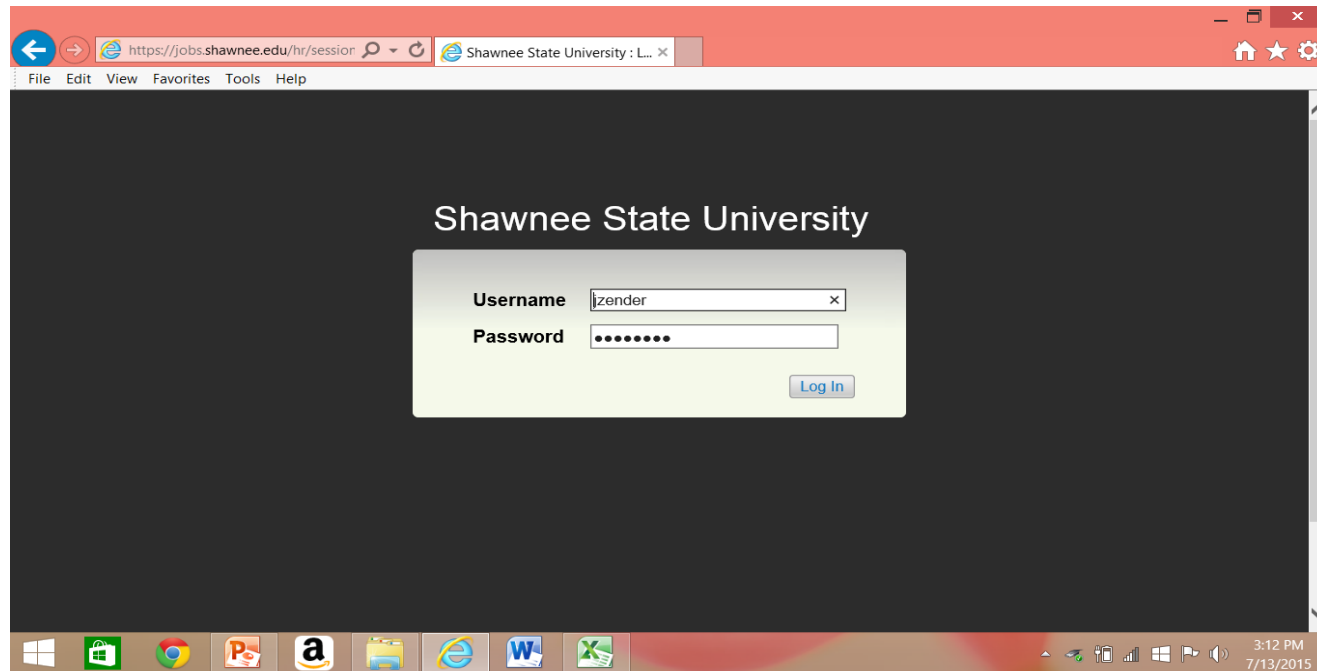
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- The self-evaluations should be completed by April 15th.
- The following slides will review the process of logging into the system, accessing the evaluation, and completing it.

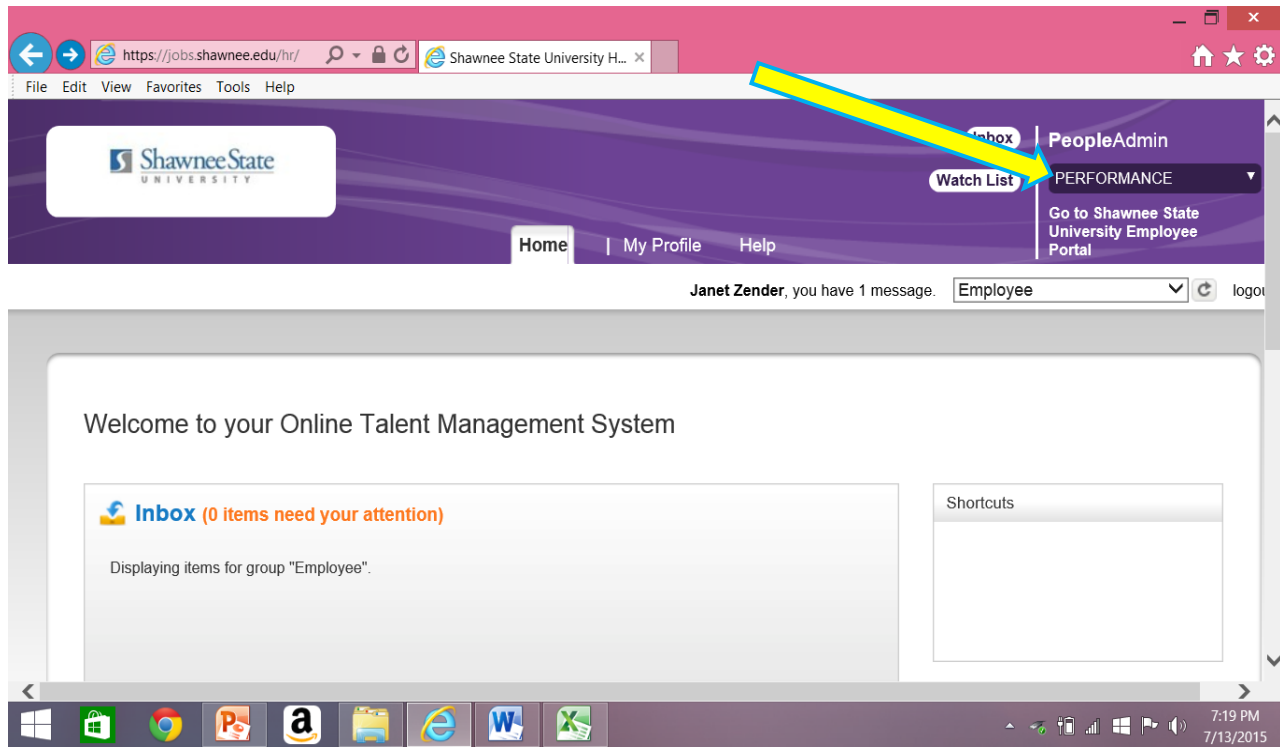
# Logging in

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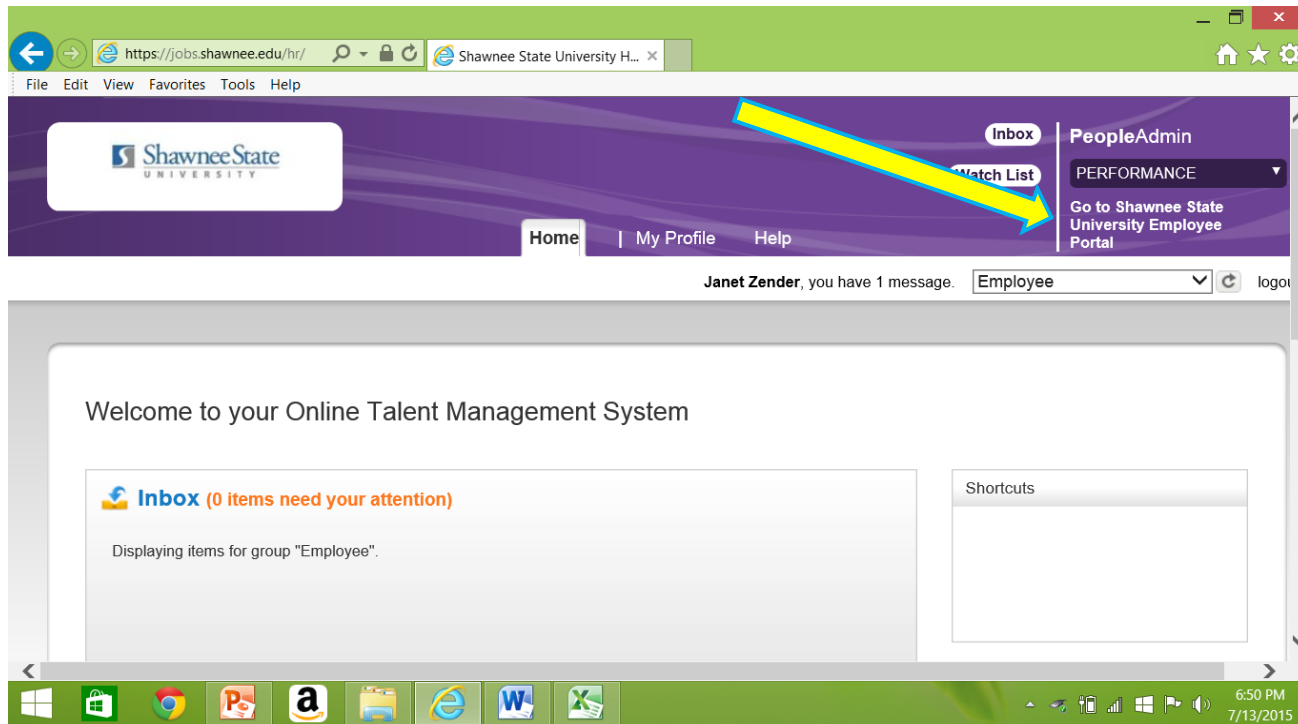
Log in to PeopleAdmin: <https://jobs.shawnee.edu/hr/> Your login should be the same as the one you use to log into your computer.



Click on the “Performance module” in the upper right corner.



To enter the Employee Portal, click “Go to Shawnee State University Employee Portal” in the Performance Module.



To log into your self-evaluation, click on “My Reviews” at the top left hand corner. Complete your own self evaluation first; your supervisor will be asking you for it. It will also remind you to check on your employees progress with their self evaluations.

To access your employee’s reviews, click on “My Employees’ Reviews”.

The screenshot shows the Shawnee State University Employee Portal. The browser address bar displays <https://jobs.shawnee.edu/portal>. The page header includes the Shawnee State University logo, navigation links (Home, Performance), and user information (Hello, Malonda, Log Out). A 'Performance' dropdown menu is open, showing 'My Reviews' and 'My Employees' Reviews'. A yellow arrow points to 'My Employees' Reviews'. The main content area is titled 'Welcome to the Employee Portal,' and 'Your Action Items'. Below this is a table with columns: Item, Description, Due Date, Status, and Action.

Item	Description	Due Date	Status	Action
Administrative Individual Professional 2015-2016 for Megan Ketter	Supervisor Creates Plan	2015-09-30 Due 6 months ago	Overdue	View
Administrative Supervisor 2015-2016 for Malonda Johnson	Employee Acknowledges Plan	2015-10-15 Due 5 months ago	Overdue	View
Administrative Supervisor 2015-2016 for Malonda Johnson	Employee Self-Evaluation	2016-03-31 Due in 16 days	Upcoming	View
Administrative Supervisor Probationary for Judith (Judi) McGraw	Supervisor Creates Plan	n/a	Available	View
Administrative Supervisor Probationary for Megan Ketter	Supervisor Creates Plan	n/a	Available	View

The first tab will be “Core Competencies”, where you will see the competency listed, a definition of the competency, and then behaviors or actions that will be seen if your employee is applying that competency in his/her work. You will be rating the employee on each competency using the rating scale on the following slide. ***If the rating is above or below a “Meets Performance Expectations”, you must add comments regarding performance in the critical areas.***

**Be sure to save your work often!**

Shawnee State University

Self Evaluation for

It is now time to complete your annual self-evaluation. As you evaluate your own performance, please reflect on how actual performance compares with what is expected of you. As you review the details below, provide a self-assessment and comment on each element as you see appropriate. Remember that you may want to refer to your Progress Notes (if you kept any during the review period) by clicking on "Progress Notes" on the left side menu.

Core Competencies Goals Attachments

Core Competencies

Name:  
Leadership

Description:  
Using appropriate methods and flexible interpersonal styles, builds a cohesive team that meets university objectives. Focuses on the development of employees within assigned organization.  
-Develops direction, structure, and plans to meet the goals of his/her organization.  
-Facilitates goal accomplishment through involvement of others, encourages others to take responsibility, and modeling of commitment to accomplishment.  
-Sets expectations for employees, provides coaching and feedback formally and informally and facilitates learning.  
-Follows up to ensure attainment of quality, cost, and schedule commitments.  
-Acknowledges contributions, demonstrates advocacy, supports disclosure for employees, and personally behaves consistently with organizational mission and policies.

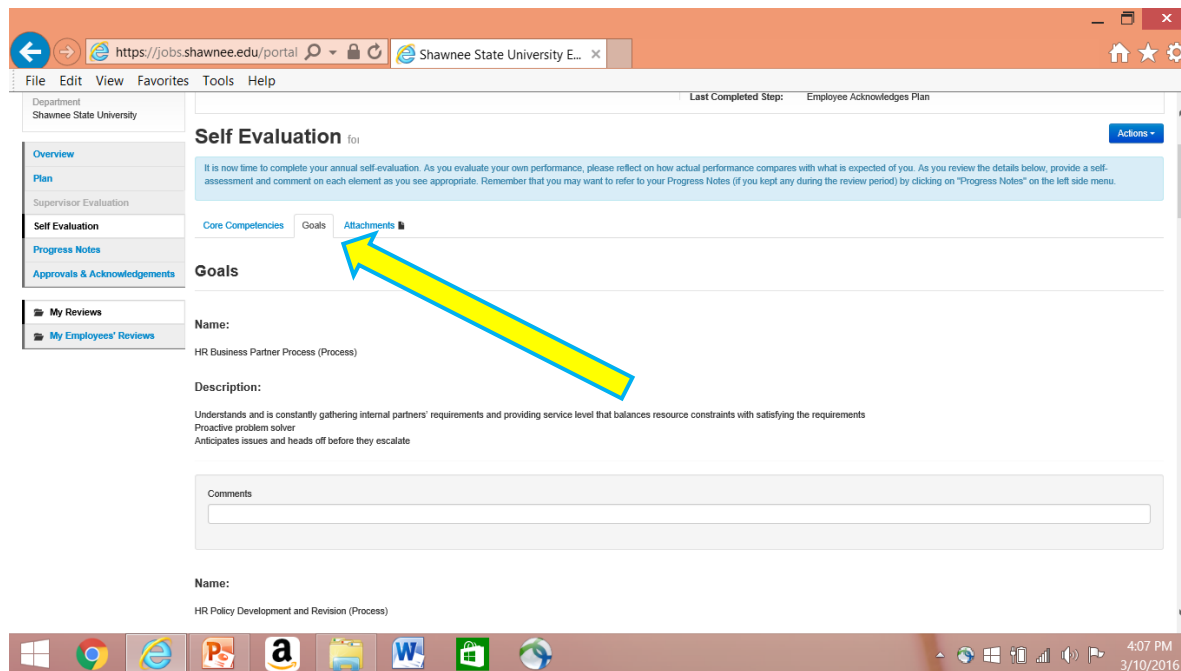
Comments



# SSU's Rating Scale

- Outstanding Performance (O) – The employee's performance significantly and consistently surpassed job performance standards and requirements in all areas of responsibility when measured by quality, quantity and value to the university. Demonstrated a personal commitment to a high level of performance and results, even under challenging work goals. **Examples are required to support your rating**
- Exceeds Performance Requirements (E) – The employee frequently demonstrated performance beyond job requirements in essential areas of responsibility and/or made contributions well beyond job demands. Took initiative in development and implementation of challenging work goals. **Examples are required to support your rating**
- Meets Performance Requirements (M) – The employee's performance was steady and reliable, and consistently met the performance expectations of a fully qualified and experienced person in this position. Errors were minimal and seldom repeated. Required normal supervision and follow-up and almost always completed work on schedule.
- In Development or Needs Improvement (NI) – The employee's performance is still developing and/or did not consistently meet the requirements of the position in essential areas of responsibility. A performance improvement plan (PIP) may be required. **Examples are required to support your rating**
- Unsatisfactory Performance (U) - The employee's performance was consistently below the requirements of the position in essential areas of responsibility or the employee failed to make reasonable progress on a performance improvement plan. A performance improvement plan (PIP) must be established. **Examples are required to support your rating**
- New (N) (Too New to Evaluate) (Developing in a new position held less than 6 months.)

Once you have completed the “Core Competencies”, click the second tab to access the goals. You will again enter examples. **If you did not meet with your employee to set goals, you will leave this section blank.** If you did meet with your employee to set goals, you will now be rating the employee on each goal. **If the rating is above or below a “Meets Performance Expectations”, you will add examples in the comments section.**



The screenshot shows a web browser window with the URL <https://jobs.shawnee.edu/portal>. The page is titled "Self Evaluation" and is for the "Shawnee State University" department. The "Last Completed Step" is "Employee Acknowledges Plan". The left sidebar contains a navigation menu with the following items: Overview, Plan, Supervisor Evaluation, Self Evaluation (highlighted), Progress Notes, Approvals & Acknowledgements, My Reviews, and My Employees' Reviews. The main content area has three tabs: Core Competencies, Goals (selected), and Attachments. A yellow arrow points to the "Goals" tab. Below the tabs, the "Goals" section is displayed. It includes a "Name:" field with the value "HR Business Partner Process (Process)" and a "Description:" field with the text: "Understands and is constantly gathering internal partners' requirements and providing service level that balances resource constraints with satisfying the requirements", "Proactive problem solver", and "Anticipates issues and heads off before they escalate". Below the description is a "Comments" text area. At the bottom of the page, there is another "Name:" field with the value "HR Policy Development and Revision (Process)". The Windows taskbar at the bottom shows the time as 4:07 PM on 3/10/2016.

Once you have completed the evaluation and are ready for it to be reviewed by the second level supervisor, click “Complete”.

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## Supervisor/Employee Performance Review Discussion

*This is the most important part of the process!*

# Performance Review Discussion

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- Before meeting with your employee, be sure to review the action items from the “Coaching” training and prepare what you need to say.
- “Marginal employees” should be put “on notice” for improvement. Be sure to let them know your expectations. You should contact HR for help.
- Remember, out of your meeting with the employee, you should be able to set SMART goals for them for the 2016-2017 performance year.

# Questions

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- General questions such as “who do I talk to about...?” can start with Megan Ketter at [mketter@shawnee.edu](mailto:mketter@shawnee.edu) (3167)
- If you have questions/concerns about the lack of goal plans or discussions, contact Dave Zender at [dzender@shawnee.edu](mailto:dzender@shawnee.edu) (3398)
- If you have questions about the system, contact Janet Zender at [jzender@shawnee.edu](mailto:jzender@shawnee.edu)