Annual Evaluation Guide

	Action	Notes
1.	Review the Self-Evaluations submitted by your staff	• What were your major achievements in the past year? • What are the areas of your performance in which you believe you could improve? Please describe. • How would you assess your overall performance during this review period? Please describe. • What job challenges, if any, do you have or resources do you need in performing your job?
2.	Review the Annual Evaluation online form before entering ratings and comments ANNUAL PERFORMANCE REVIEW FORM	• Core Criteria • Examples • Ratings
3.	Enter required information for each staff member's online evaluation	• Employee Name, Employee email, & Employee S0# • Your information - Supervisor Name, Supervisor email, & Supervisor S0#
4.	Review each Core Criteria Category	• 7 Core Criteria Categories for Staff • 8 Core Criteria Categories for Management
5.	Use the radial button to select a Performance Rating for each Core Criteria category • Exceeds Expectations • Achieves Expectations • Sometimes Achieves Expectations • Unsatisfactory	• In order to review the examples for each rating, select the radial button corresponding with the rating; and the examples will change to reflect that rating. • The examples given are general examples and may not be applicable to every position or department. • You may provide other examples or details in the comment box.

	(**You may save selections and resume at a later time. The resume feature will allow you to update, edit, revise, etc.)	
6.	Add Comments	• Comments are **required** for Unsatisfactory ratings. • Comments are encouraged for all ratings.
7.	Add comments (if applicable) for Significantly Exceeds Expectations. Comment box must be completed for extra merit consideration. ***Note** - Significantly Exceeds Expectations make the employee eligible for extra merit consideration, but does not guarantee extra merit.	• Managers must select the "Exceeds Expectations" radial button. • The Significantly Exceeds Expectations box will display under the general comments box. • This comment box is **only** used for extra merit consideration. • General comments should be placed in the comments box.

8.	Select Overall Performance Rating	• Manager selects the overall rating based on the number of ratings in each category.
		   o Exceeds Expectations (at least 3 of 7 ratings score at this level)
		   o Achieves Expectations (at least 4 of 7 score at this level)
		   o Sometimes Achieves Expectations (at least 3 of 7 score at this level)
		   o Unsatisfactory (if one or more score at this level)
		• If scoring falls into two ratings, the manager will select the rating that most appropriately reflects performance.

9.	Add Supervisory Comments	• Manager is encouraged to provide comments to summarize the employees' overall performance for the pro-rated year (July –December 2018). • Comments are **required** for an Overall Unsatisfactory Rating. • Comments are encouraged for all Ratings.
10.	Save & Resume	• The save button is located at the bottom/right corner of the form. • If you are working on the form and are unable to submit, please be sure to save the form and resume later.

		• Managers will have an option to copy the link, or they may enter their email address and the saved link will be emailed. • The sender will be "Southeast Missouri State University". • The email subject will be "Annual Performance Review – Employee Name". • In the body of the email, Managers may select the "resume now" button to complete the performance review form. • If someone follows their saved link and returns to their entry, they can pick up where they left off and complete their submission. • Managers should save the form prior to meeting with the employee, so they have the ability to make any edits prior to submitting.
11.	Conduct Face to Face Meeting (By the 1st week of February)	• Managers meet individually with each staff member to review the form and discuss performance. • Manager will print a copy of the form to review with the staff member. • Manager and staff discuss goals for 2019. • Some goals may be pre-determined for the position or the department. • Other goals may be discussed and set as a result of the meeting.
12.	Assign Goals	• Managers will enter 2019 goals and how they will measure success. • Three (3) boxes are provided to detail goals and measurements. • Managers may add more boxes by selecting the "add" button below the goals.
13.	Complete & Submit Annual Evaluation	• When the review is finalized and goals are entered, the Manager will select the submit button. • An electronic copy will be emailed to the manager, with the Employee's name in the subject line. • Print the finalized copy.

		• The employee will sign, manager will sign, and the employee will add any comments.
14.	Send the form to the Reviewer (by the 1st week in February)	• Both the signed paper Annual Evaluation and the Self-Evaluation are sent to the Reviewer.
15.	Reviewer sends final copies to Human Resources (by February 22nd)	• Reviewer received Annual Evaluation and attached Self-Evaluation for each staff member in their organization. • Evaluation are reviewed, signed, and then forwarded to Human Resources.