

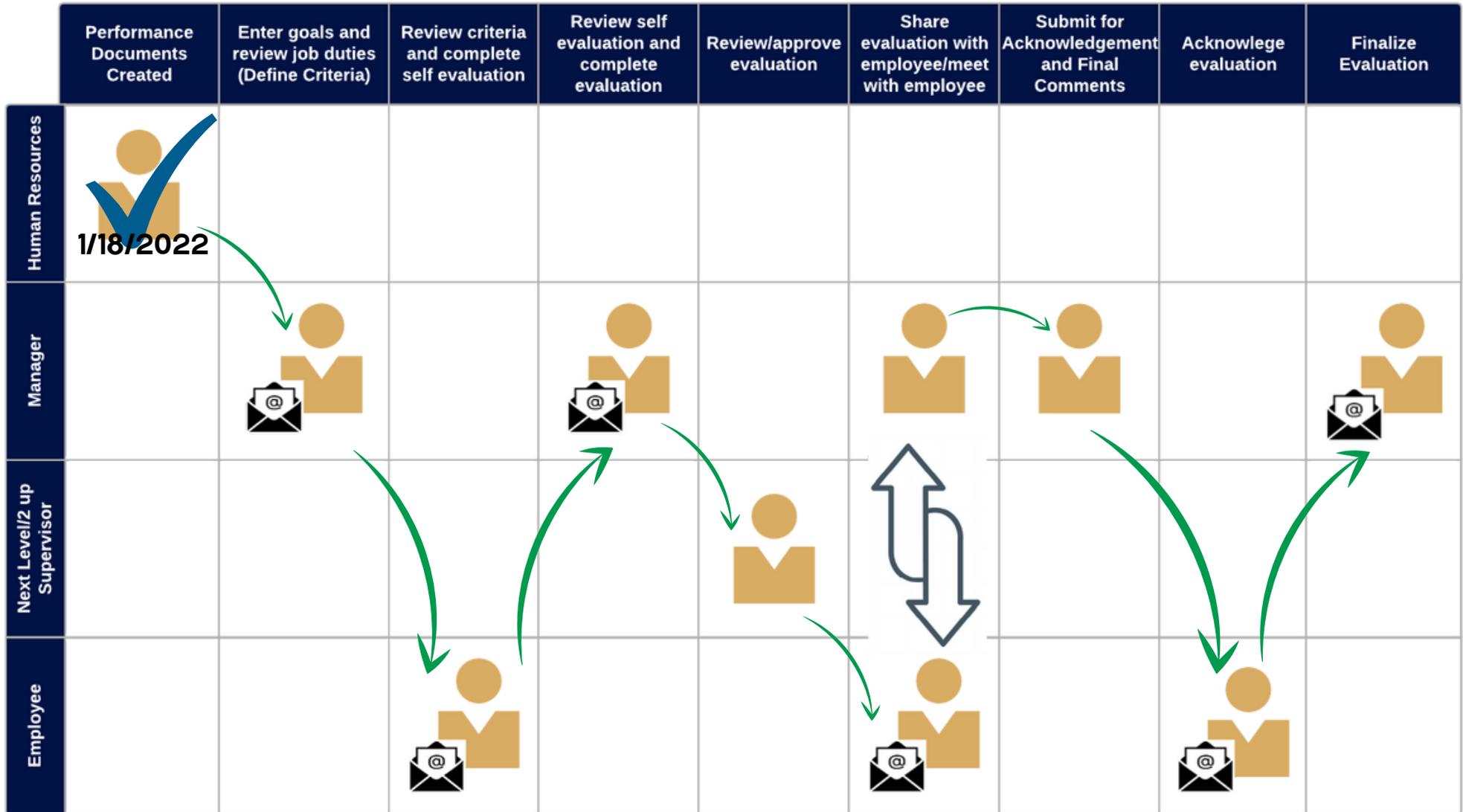
# MANAGER'S GUIDE

ANNUAL PERFORMANCE  
EVALUATIONS  
UTILIZING ONEUSG EPERFORMANCE MODULE

2022

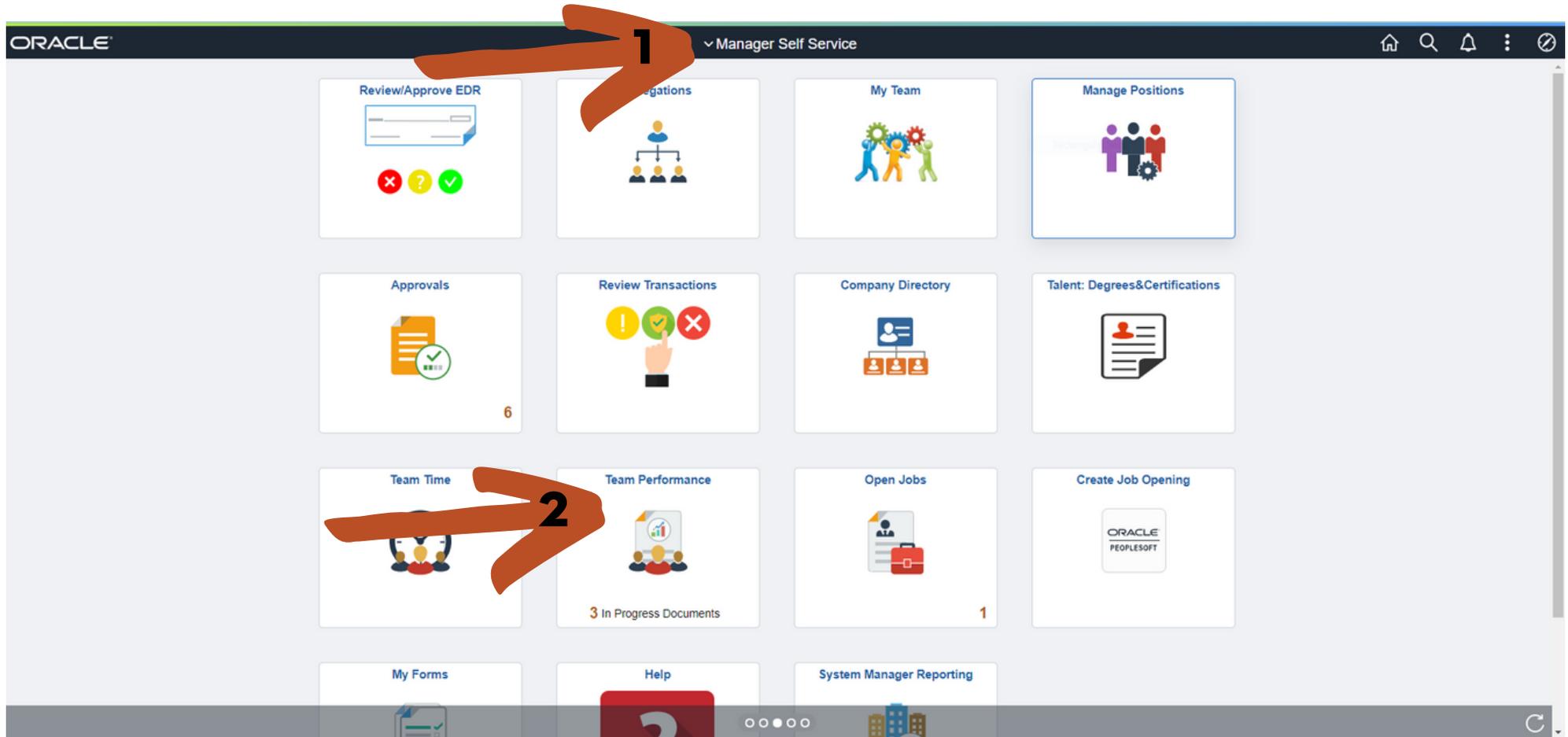


# ePerformance Process




 System Generated email notification

# MANAGER: NAVIGATING TO EVALUATIONS



Log into OneUSG Connect.

1. Select Manager Self Service (if you are completing an evaluation of someone else).
2. Select Team Performance.

# MANAGER: NAVIGATING TO EVALUATIONS

The screenshot shows the 'Team Performance' interface with a sidebar on the left containing navigation options: 'Current Documents', 'Delegated Documents', 'Historical Documents', 'View-Only Documents', 'Approve Documents', and 'View Approval Status'. The main content area is titled 'Current Documents' and displays a table with 3 rows. The table has columns for 'Name / Job Title', 'Document Type', 'Document Status', 'Period Begin / Period End', and 'Next Due Date'. Each row includes a user profile icon and a right-pointing arrow.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 <b>Rosalind Calles</b> Human Resources Manager	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021
 <b>Kathryn Edwards</b> Human Resources Manager	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021
 <b>Carissa Hendricks</b> Human Resources Coordinator	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021

This screen shows the manager each person assigned to them for evaluation. This is based on "Reports To" structure in OneUSG Connect. If someone is in your list that should be removed or if someone is missing, please submit a MyHelp Ticket with the subject "EPerformance Manager Update".

Document Status will tell you at what step of the process the evaluation is currently. As you complete evaluations, the individual name disappears from this main screen and moves to "Historical Documents".

DISREGARD NEXT DUE DATE! This is a system generated due date and does not align with our process.

Click on a name to begin the process.

# MANAGER: DEFINE CRITERIA/GOALS

The screenshot shows the 'Performance Process' interface for 'USG Annual Review for Staff'. The main heading is 'Define Criteria - Update and Approve'. The user is 'Rosalind Calles', and the manager is 'Vickie Shaw'. The document type is 'USG Annual Review for Staff', and the period is '01/01/2021 - 12/31/2021'. The status is 'In Progress'. The 'Goals' tab is selected, and the 'Section 1 - Goals' section is expanded. The 'Goals Summary' section shows a 'Section Weight' of 25% (not less than 25%). The 'Add Item' button is highlighted with a red arrow and the number 3.

Performance Process

USG Annual Review for Staff

Define Criteria - Update and Approve

Rosalind Calles

Job Title: Human Resources Manager

Document Type: USG Annual Review for Staff

Template: Enhanced Staff Template

Status: In Progress

Manager: Vickie Shaw

Period: 01/01/2021 - 12/31/2021

Document ID: 7044

Due Date: 12/31/2021

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
2. Make any necessary adjustments to the criteria and review your changes with the employee.  
3. Once the performance criteria is correct select the approve button to complete this step.

Goals | Job Duties | Performance Factors | Core Values

Section 1 - Goals

Goals will be evaluated by: Employee, Manager

Add Item

Goals Summary

Section Weight: 25 % (not less than 25%)

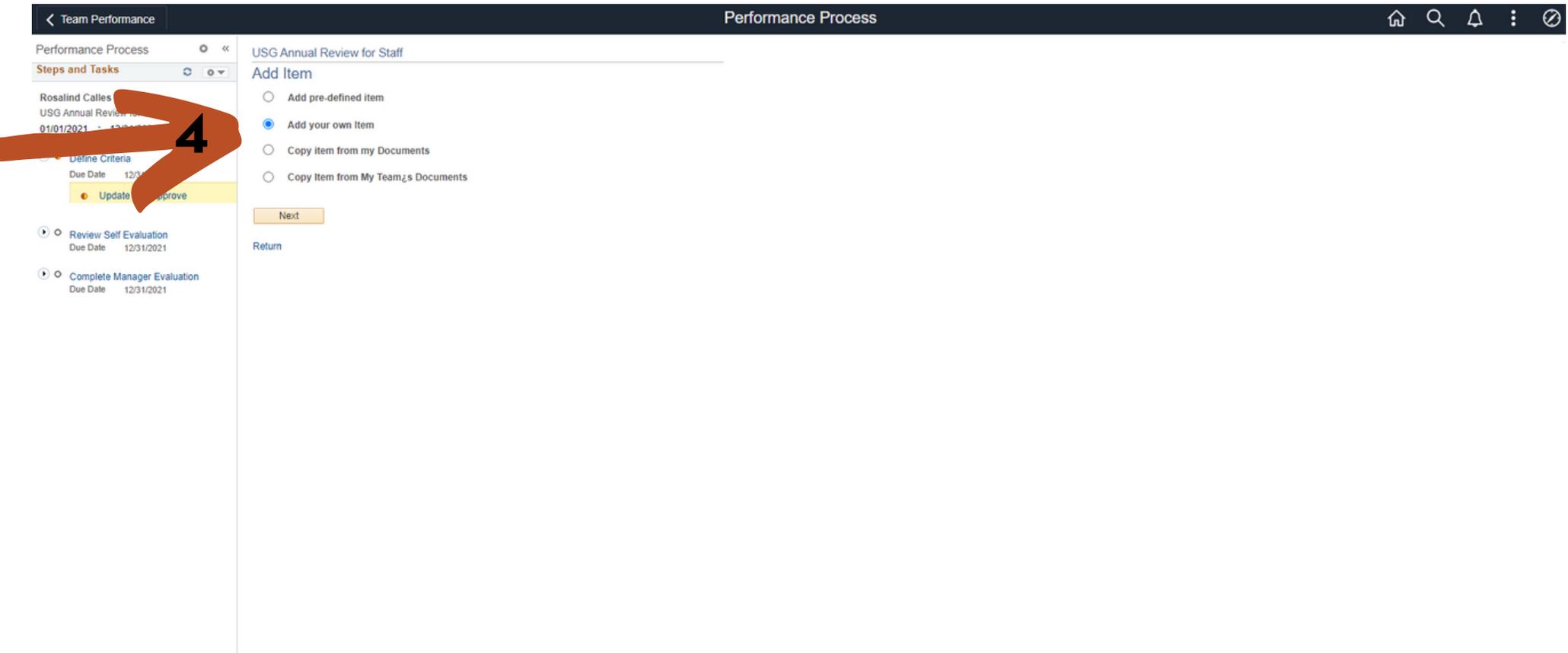
Audit History

Created By: Carol Lightle | 12/16/2021 8:23:41AM

3. On the Goals tab, you will need to add the goals set on LAST YEAR'S evaluation. Click "Add item" for each goal set for the year you are evaluating.

While it appears that you can edit the Section Weight, the system will not allow you to alter this.

# MANAGER: DEFINE CRITERIA/GOALS



The screenshot shows a web application interface for 'Performance Process'. The top navigation bar includes a back arrow, 'Team Performance', 'Performance Process', and utility icons (home, search, notifications, menu, refresh). The main content area is titled 'USG Annual Review for Staff' and features an 'Add Item' section with four radio button options: 'Add pre-defined item', 'Add your own Item' (which is selected), 'Copy item from my Documents', and 'Copy Item from My Team's Documents'. Below these options are 'Next' and 'Return' buttons. On the left, a sidebar lists 'Steps and Tasks' for 'Rosalind Calles' and 'USG Annual Review for Staff', with 'Define Criteria' highlighted in yellow and a large orange arrow pointing to it with the number '4'.

4. Select "Add your own item" to enter the description of each goal.

# MANAGER: DEFINE CRITERIA/GOALS

The screenshot shows the 'Performance Process' interface for 'USG Annual Review for Staff'. The sidebar on the left lists 'Steps and Tasks' with 'Define Criteria' selected. The main form has a 'Title' field, a 'Description' field with a rich text editor, and 'Start Date' and 'End Date' fields. A red arrow labeled '5' points to the 'Add Your Own Item' section, and another red arrow labeled '6' points to the 'Add' button.

5. Enter a title (brief description) under title and a full description in the larger box. You can use the formatting functions as you would in a Word document (lists, bold, italics, etc). If there were specific dates associated with the goal, you can enter those as well. Dates are NOT required.

6. Click Add.

Repeat these steps until you have entered all goals.

# MANAGER: DEFINE CRITERIA/JOB DUTIES

Performance Process

USG Annual Review for Staff

Define Criteria - Update and Approve

Status In Progress Due Date 12/31/2021

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
2. Make any necessary adjustments to the criteria and review your changes with the employee.  
3. Once the performance criteria is correct select the approve button to complete this step.

Goals Job Duties Performance Factors Core Values

Section 2 - Job Duties & Knowledge

Job Duties & Knowledge will be evaluated by: Employee, Manager

Expand Collapse

- Perform
- Serve as liaison with various departments
- Participate in project management
- Manage special projects
- Serve on University and departmental work team
- Perform a wide range of complex and confidential duties
- Manage departmental budgets
- Oversee all departmental purchasing processes
- Ensure departmental purchases comply
- Manage monthly departmental billing process
- Coordinate and oversee annual activities
- Manage the annual performance evaluation process
- Facilitate Employee Relations investigations
- Organize formal hearings

Save Approve

Print Notify Export

On the Job Duties tab, you will find each duty listed in the position description.

7. Click SAVE often! If you have made edits and leave the system (or it logs you out automatically due to inactivity), you will lose anything you have not saved.

8. For ease of use, click expand to view the full description of all job duties.

While it appears that you can edit the Section Weight, the system will not allow you to alter this.

# MANAGER: DEFINE CRITERIA/JOB DUTIES

Team Performance | Performance Process

USG Annual Review for Staff

Define Criteria - Update and Approve

3. Once the performance criteria is correct select the approve button to complete this step.

Goals | Job Duties | Performance Factors | Core Values

Section 2 - Job Duties & Knowledge

Job Duties & Knowledge will be evaluated by: Employee, Manager

Expand | Collapse

Perform

Description : Perform related duties as assigned to support the mission of the University

Created By Profile 12/16/2021 8:23AM

Serve as liaison with various departments

Description : Serve as liaison with various departments across the University (Financial Services, Procurement, etc.)

Created By Profile 12/16/2021 8:23AM

Participate in project management

Description : Participate in project management and business improvement projects

Created By Profile 12/16/2021 8:23AM

Manage special projects

Description : Manage special projects independently or as part of a group

Created By Profile 12/16/2021 8:23AM

Save | Approve

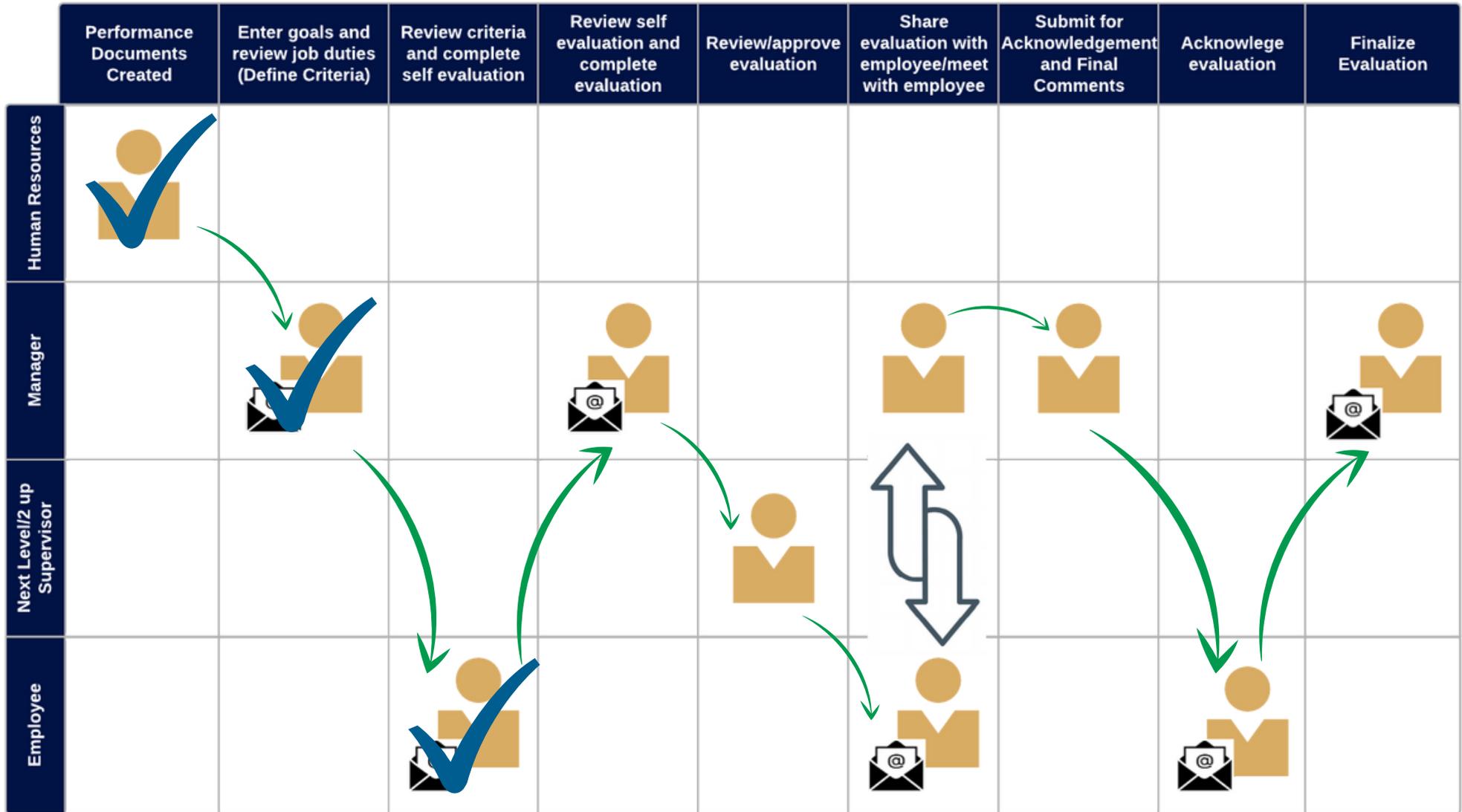
Print | Notify | Export

9. Review each duty. If it no longer applies, you may delete it by clicking on the trashcan icon. We advise all managers to delete "Perform related duties as assigned to support the mission of the University" since all other duties should support the mission of the University. You cannot add job duties for this evaluation cycle.

10. Click Save! Once you have reviewed job duties and deleted any that should not be evaluated this year, click Submit. This sends the evaluation to the employee so they can complete their Self Evaluation.

While it appears that you can edit the Section Weight, the system will not allow you to alter this.

# ePerformance Process



 System Generated email notification

# MANAGER: REVIEW SELF EVALUATION

The screenshot displays the 'Manager Self Service' interface for 'Team Performance'. A left-hand navigation menu includes options for 'Current Documents', 'Delegated Documents', 'Historical Documents', 'View-Only Documents', 'Approve Documents', and 'View Approval Status'. The main content area, titled 'Current Documents', features a table with the following data:

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date	
 <b>Rosalind Calles</b> Human Resources Manager	USG Annual Review for Staff	Evaluation in Progress	01/01/2021 12/31/2021	12/31/2021	>
 <b>Kathryn Edwards</b> Human Resources Manager	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021	>
 <b>Carissa Hendricks</b> Human Resources Coordinator	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021	>

Log into OneUSG Connect and navigate to Manager Self Service and Team Performance. As you see here, "Evaluation in Progress" indicates the evaluation was started. "Define Criteria" are the ones you have not yet started.

# MANAGER: REVIEW SELF EVALUATION

Performance Process

USG Annual Review for Staff

Manager Evaluation - Update and Submit

Rosalind Calles

Job Title Human Resources Manager

Manager Vickie Shaw

Document Type USG Annual Review for Staff

Period 01/01/2021 - 12/31/2021

Template Enhanced Staff Template

Document ID 7044

Due Date 12/31/2021

Employee ID 0048921

Department 0350101 Human Resources, Office Of

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Calculate All Ratings

Goals Job Duties Performance Factors Core Values Overall Summary Sign-off Remarks

Section 1 - Goals

Expand Collapse

Goal 1

Goals Summary

Summary Weight 25% (not less than 25%)

Manager Rating 0.00

Manager Comments

Employee Rating 5 - Exemplary

Attachments

11. Click on Review Self Evaluation to view the full self evaluation submitted by the employee. You can navigate to each tab to review comments and ratings provided by the employee. You will also be able to view the ratings and comments by the employee as you navigate through the Manager Evaluation.

12. Click on Complete Manager Evaluation to begin your evaluation of the employee.

# MANAGER: EVALUATE GOALS

Performance Process

USG Annual Review for Staff

Manager Evaluation - Update and Submit

Calculate All Ratings

Goals Job Duties Performance Factors Core Values Overall Summary Sign-off Remarks

Section 1 - Goals

Expand Collapse

Goal 1

Description: Provide Excellent Customer Service in the the Service Center

Start Date: End Date:

Manager Rating: 5 - Exemplary 5.00

Manager Comments: I have received constant feedback from clients related to the service Rosalind provided them.

Employee Rating: 5 - Exemplary

Employee Comments:

Created By: Vickie Shaw 12/16/2021 3:45PM  
Last Modified By: Vickie Shaw 12/16/2021 3:45PM

Goals Summary

Summary Weight: 25% (not less than 25%)

Manager Rating: 0.00

Manager Comments:



You will provide a rating on each goal using the 5 point rating scale.

13. For ease of use on any tab, click Expand to provide a full view of each item on that tab.
14. Select the rating for each goal listed on each tab. For any rating other than "3 - Successful" you should add comments to explain why you selected this rating. You can use the formatting functions as you would in a Word document (lists, bold, italics, etc).
15. Click SAVE often! If you have made edits and leave the system (or it logs you out automatically due to inactivity), you will lose anything you have not saved.

# MANAGER: EVALUATE GOALS

The screenshot displays the 'Performance Process' interface for 'USG Annual Review for Staff'. The main title is 'Manager Evaluation - Update and Submit'. The interface includes a sidebar with 'Steps and Tasks' (Define Criteria, Review Self Evaluation, Complete Manager Evaluation, Update and Submit) and a main content area with 'Employee Rating' (5 - Exemplary), 'Employee Comments', 'Goals Summary' (Summary Weight: 25%, Manager Rating: 0.00), 'Attachments', and 'Audit History'. Three orange arrows point to specific elements: arrow 16 points to the 'Update and Submit' step in the sidebar; arrow 17 points to the 'Add Attachment' button; and arrow 18 points to the 'Save' button in the top right corner.

The system will automatically calculate the overall Goals rating.

16. Add any overall comments you have related to goals.

17. You can attach documents to support anything in the evaluation (certificates, list of training completed, etc). However, there is no requirement to upload attachments.

18. Click SAVE often! If you have made edits and leave the system (or it logs you out automatically due to inactivity), you will lose anything you have not saved.

While it appears that you can edit the Section Weight, the system will not allow you to alter this.

# MANAGER: EVALUATE JOB DUTIES

Performance Process

USG Annual Review for Staff

Manager Evaluation - Update and Submit

Facilitate Employee Relations investigations

Description : Facilitate Employee Relations investigations by coordinating calendars, participating in interviews, compiling supporting documentation, and preparing reports

Manager Rating 0.00

Employee Rating 3 - Successful

Employee Comments Assisted with investigations as needed and provided supporting documentation.

Organize formal hearings

Description : Organize formal hearings for Grievance Hearings and Title IX Sexual Misconduct cases involving employees

Manager Rating 0.00

Employee Rating 5 - Exemplary

Employee Comments Developed a SOP for administrative parts of hearings.

Steps and Tasks

- Define Criteria
- Complete Manager Eval
- Update and Submit**
- Pending Approval
- Share with Employee
- Request Acknowledgement
- Pending Acknowledgement
- Complete

Save | Submit for Approval

Print | Notify | Export



You will provide a rating on each goal using the 5 point rating scale.

19. Select the rating for each job duty listed on each tab. For any rating other than "3 - Successful" you should add comments to explain why you selected this rating. You can use the formatting functions as you would in a Word document (lists, bold, italics, etc).
20. Click SAVE often! If you have made edits and leave the system (or it logs you out automatically due to inactivity), you will lose anything you have not saved.

# MANAGER: EVALUATE PERFORMANCE FACTORS

Performance Process

USG Annual Review for Staff

Manager Evaluation - Update and Submit

Rosalind Calles  
USG Annual Review for Staff  
01/01/2021 - 12/31/2021

Define Criteria  
Due Date 12/31/2021

Review Self Evaluation  
Due Date 12/31/2021

Complete Manager Evaluation  
Due Date 12/31/2021

Update and Submit

Pending Approval

Request Acknowledges

Pending Acknowledges

Complete

Employee Rating 5 - Exemplary

Employee Comments  
I did not have any instances of unscheduled leave this evaluation period. I completed 90% of all assigned tasks before the provided deadlines.

Created By Template 12/16/2021 8:23AM

Critical Thinking

Description : The extent to which the employee demonstrates proper judgment in decision-making and displays effective problem-solving skills.

Manager Rating 4 - Superior 4.00

Manager Comments  
Rosalind anticipates issues impacting the operations of the Service Center and implements and plan to address it.

Employee Rating 4 - Superior

Employee Comments

Created By Template 12/16/2021 8:23AM

Performance Factors Summary

Summary Weight 20% (not less than 20%)

Manager Rating 0.00

Manager Comments

Save | Submit for Approval

Print | Notify | Export



Performance Factors are defined at the University System of Georgia level for all employees.

21. Provide a rating to each Performance Factor. If the rating is higher or lower than "3-Successful", you should provide comments to support the rating.

22. Click SAVE often!

While it appears that you can edit the Section Weight, the system will not allow you to alter this.

# MANAGER: EVALUATE VALUES

Team Performance Performance Process

Performance Process  
Steps and Tasks  
Rosalind Calles  
USG Annual Review for Staff  
01/01/2021 - 12/31/2021

Define Criteria  
Due Date 12/31/2021

Review Self Evaluation  
Due Date 12/31/2021

Complete Manager Evaluation  
Due Date 12/31/2021

Update and Submit

Pending Approval  
Share with Employee  
Request Acknowledgement  
Pending Acknowledgement  
Complete

USG Annual Review for Staff  
Manager Evaluation - Update and Submit  
Rosalind Calles

Job Title Human Resources Manager  
Document Type USG Annual Review for Staff  
Template Enhanced Staff Template  
Status Evaluation in Progress

Manager Vickie Shaw  
Period 01/01/2021 - 12/31/2021  
Document ID 7044  
Due Date 12/31/2021

Employee Data  
Employee ID 0048921  
Department 0350101 Human Resources, Office Of

Problem(s) completing your request:  
Please enter a rating for all items in the USG Core Values section.

Calculate All Ratings

Goals Job Duties Performance Factors Core Values Overall Summary Sign-off Remarks

Section 4 - USG Core Values  
Expand Collapse

Academic Excellence  
Description : Georgia Southern University academically challenges students, providing them with the knowledge, experiences, and support they need to develop into productive and responsible citizens.

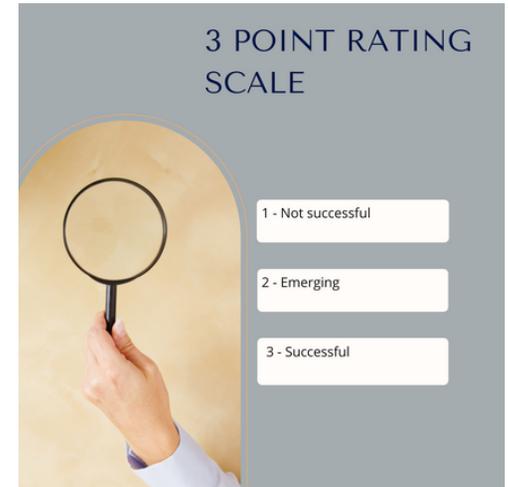
Manager Rating 0.00

Manager Comments

Employee Rating 2 - Emerging

Employee Comments  
My position does not provide for regular interaction with students. I could do a better job of seeking out opportunities to engage with this population

Save Submit for Approval  
Print Notify Exp



All employees will be evaluated on their support of the Institutional Values. Values are rated on a 3 point scale.

23. Provide a rating to each Institutional Value. You can attach documents to support anything in the evaluation (certificates, list of training completed, etc). However, there is no requirement to upload attachments.

24. Click SAVE often!

NOTE: If you fail to complete a rating for any item on any tab, you will get the error message that appears in red.

# MANAGER: OVERALL RATING

Team Performance Performance Process

Performance Process  
Steps and Tasks  
Rosalind Calles  
USG Annual Review for Staff  
01/01/2021 - 12/31/2021

Define Criteria  
Due Date 12/31/2021

Review Self Evaluation  
Due Date 12/31/2021

Complete Manager Evaluation  
Due Date 12/31/2021

Update and Submit

Pending Approval  
Share with Employee  
Request Acknowledgement  
Pending Acknowledgement  
Complete

USG Annual Review for Staff  
Manager Evaluation - Update and Submit  
Rosalind Calles

Actions

Job Title Human Resources Manager  
Document Type USG Annual Review for Staff  
Template Enhanced Staff Template  
Status Evaluation in Progress

Manager Vickie Shaw  
Period 01/01/2021 - 12/31/2021  
Document ID 7044  
Due Date 12/31/2021

Employee Data

Employee ID 0048921  
Department 0350101 Human Resources, Office Of

You have successfully saved your evaluation.

Calculate All Ratings

Goals Job Duties Performance Factors Core Values Overall Summary Sign-off Remarks

Section 7 - Overall Summary

Manager Rating 4 - Superior 3.91

Manager Comments  
Writing Tools  
Rosalind's work consistently exceeds expectations. She is committed to doing the job well, even when it requires extended working hours. She supervises her staff fairly and consistently and is growing in her people management skills. She represents the department on University and Division committees and supports the work of others. |

Employee Rating 4 - Superior

Employee Comments  
I have created multiple SOPs. I have collaborated with other areas of the department to provide streamlined services to clients. In the last year, I have developed new skills to develop my areas of responsibility. For example, I have learned and implemented the use of scheduling software for new hire processing that prevents clients from having extended waiting periods for a staff member to be available to assist.

Save Submit for Approval

Print Notify Export

25. The system will automatically calculate the overall rating for the evaluation. On this tab, you will add any overall comments you have. Consider adding any particular successes/accomplishments or challenges the employee faced this past year.

26. Click SAVE one last time and then click SUBMIT FOR APPROVAL.

# MANAGER: SUBMIT FOR APPROVAL

The screenshot shows a web interface for submitting a performance evaluation for approval. At the top, there is a dark navigation bar with a back arrow and the text 'Team Performance' on the left, and 'Performan' on the right. Below this, the main content area is split into two columns. The left column, titled 'Performance Process', shows a breadcrumb trail: 'Performance Process' > 'Steps and Tasks'. Under 'Steps and Tasks', there is a header for 'Rosalind Calles' and 'USG Annual Review for Staff' with a date range of '01/01/2021 - 12/31/2021'. A list of steps follows: 'Define Criteria' (due 12/31/2021), 'Review Self Evaluation' (due 12/31/2021), and 'Complete Manager Evaluation' (due 12/31/2021). The 'Complete Manager Evaluation' step is expanded to show sub-steps: 'Update and Submit' (highlighted in yellow), 'Pending Approval', 'Share with Employee', 'Request Acknowledgement', 'Pending Acknowledgement', and 'Complete'. The right column, titled 'Submit for Approval', contains instructions: 'Select confirm to submit this document for approval.', 'Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.', 'The overall rating you have assigned to this employee is 4 - Superior.', and 'Comments should be entered in the Overall Summary section to justify a Rating of a 1 or a 5.' At the bottom of this column are two buttons: 'Confirm' and 'Cancel'.

To submit the evaluation for approval (from next level supervisor), click CONFIRM. If you'd like to go back and make changes, click cancel to make the changes and follow the steps to get back to this screen.

The evaluation will be available for your manager (2-up from person being evaluated) to review once you click complete and you cannot make any further changes.

# MANAGER: CONFIRMATION - APPROVAL SUBMITTED

The screenshot shows a web application interface for a performance process. At the top, there is a dark navigation bar with a left arrow and the text "Team Performance", the title "Performance Process", and icons for home, search, notifications, and a refresh button. Below the navigation bar, the main content area is divided into two sections. On the left, a sidebar lists the user "Rosalind Calles" and the document "USG Annual Review for Staff" with a due date of "12/31/2021". Below this, a list of steps is shown: "Define Criteria" (Due Date: 12/31/2021), "Review Self Evaluation" (Due Date: 12/31/2021), and "Complete Manager Evaluation" (Due Date: 12/31/2021). The "Complete Manager Evaluation" step is expanded, showing a sub-step "Update and Submit" which is highlighted in yellow. Below this sub-step, a list of actions is visible: "Pending Approval", "Share with Employee", "Request Acknowledgement", "Pending Acknowledgement", and "Complete". On the right side of the main content area, the title "USG Annual Review for Staff" is followed by "Confirmation - Approval Submitted". Below this, a green checkmark icon is followed by the text "You have successfully submitted this document for approval."

From this screen, you can navigate back to the other evaluations assigned to you by clicking the "Team Performance" arrow in the upper left corner.

# MANAGER: NOTIFICATION OF DENIAL

The screenshot shows the 'Team Performance' section of the Manager Self Service interface. On the right, an 'Alerts (1)' notification box is open, displaying a message: 'Performance of Rosalind Calles has been denied.' Below this, two other notifications are visible: 'Job Opening Human Resources Manager has been approved.' The main content area shows a table of 'Current Documents' with the following data:

Name / Job Title	Document Type	Document Status
Rosalind Calles Human Resources Manager	USG Annual Review for Staff	Evaluation in Progress
Kathryn Edwards Human Resources Manager	USG Annual Review for Staff	Define Criteria
Carissa Hendricks Human Resources Coordinator	USG Annual Review for Staff	Define Criteria

If an evaluation is denied, you will receive notification. Click on the notification icon (bell) to see the notification. Clicking on the notification will take you to the denied evaluation.

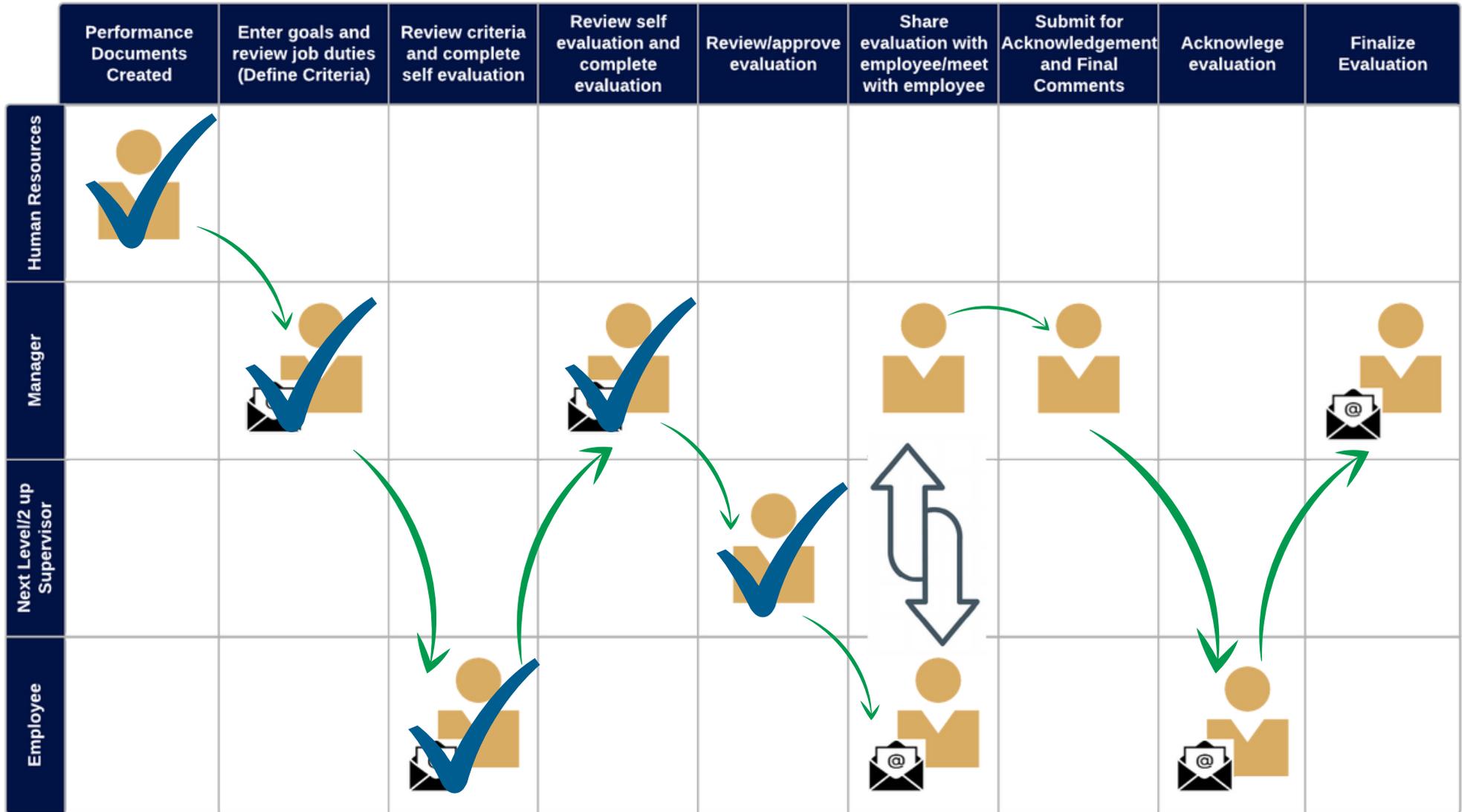
The screenshot shows the 'Performance Process' interface for a 'USG Annual Review for Staff' document. The 'Update and Submit' step is highlighted in the 'Steps and Tasks' sidebar. The main content area displays the following information:

- Employee Data:** Employee ID 0048921, Department 0350101, Human Resources, Office Of
- Manager:** Vickie Shaw
- Document Type:** USG Annual Review for Staff
- Period:** 01/01/2021 - 12/31/2021
- Document ID:** 7044
- Status:** Evaluation in Progress

A red notification message is displayed: 'Approval has been denied for this Performance Document.' Below this, there are tabs for 'Goals', 'Job Duties', 'Performance Factors', 'Core Values', 'Overall Summary', and 'Sign-off Remarks'.

Notice the red notification indicating the evaluation has been denied. You cannot send the evaluation to the employee until revisions have been made and approved. Make these revisions following the above directions on navigating through the evaluation and submitting it for approval.

# ePerformance Process



 System Generated email notification

# MANAGER: SHARE WITH EMPLOYEE

Manager Self Service Team Performance

Current Documents

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Rosalind Calles Human Resources Manager	USG Annual Review for Staff	Approval - Approved	01/01/2021 12/31/2021	12/31/2021
Kathryn Edwards Human Resources Manager	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021
Carissa Hendricks Human Resources Coordinator	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021

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Team Performance Performance Process

USG Annual Review for Staff

Manager Evaluation - Share with Employee

Rosalind Calles

Job Title Human Resources Manager  
Document Type USG Annual Review for Staff  
Template Enhanced Staff Template  
Status Approval - Approved

Manager Vickie Shaw  
Period 01/01/2021 - 12/31/2021  
Document ID 7044  
Due Date 12/31/2021

Employee Data

Employee ID 0048921  
Department 0350101 Human Resources, Office Of

Goals Job Duties Performance Factors Core Values Overall Summary Sign-off Remarks

Section 1 - Goals

Goal 1

Goals Summary

Summary Weight 25% (not less than 25%)

28

27. Click on the evaluation you want to share. NOTE: The Document Status indicates "Approval - approved".

28. Click Share with Employee. This sends notification to the employee to review the evaluation you have completed. You can also click the "Export" button to export a Word document of the evaluation to use during the face to face meeting with the employee.

# MANAGER: CONFIRM SHARE WITH EMPLOYEE

The screenshot shows a web application interface for a performance process. At the top, there is a dark navigation bar with a back arrow, 'Team Performance', 'Performance Process', and icons for home, search, notifications, and settings. Below this, the main content area is titled 'Performance Process' and 'Share with Employee'. A 'Steps and Tasks' sidebar on the left lists several steps: 'Define Criteria', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Complete Manager Evaluation' step is expanded, showing sub-tasks: 'Update and Submit', 'Pending Approval', and 'Share with Employee', which is highlighted in yellow. A large orange arrow with the number '29' points to the 'Share with Employee' step. The main content area contains a message: 'Select confirm to share this document with the employee. Next, you should meet with the employee to discuss your evaluation.' Below the message are two buttons: 'Confirm' and 'Cancel'.

29. Confirm that you want to share the evaluation with the employee.

# EMPLOYEE/MANAGER: EVALUATION MEETING



The performance evaluation meeting is an opportunity to have an honest conversation between the employee and the manager. The employee should be given an opportunity to share their thoughts on their performance, any challenges they've faced, what they think they accomplished in the last year and ways the manager has either supported or hindered their progress. The manager should have the opportunity to reinforce feedback given throughout the year, highlight accomplishments of the employee and discuss what they observe as opportunities for growth and development. After a review of the performance evaluation document, the manager and employee should set goals for the coming year. It is completely acceptable to ask the employee to come to the evaluation with several goals in mind for the coming year.

## SETTING GOALS

You will need to set and document goals for the coming year with each employee. Here are some tips to consider:

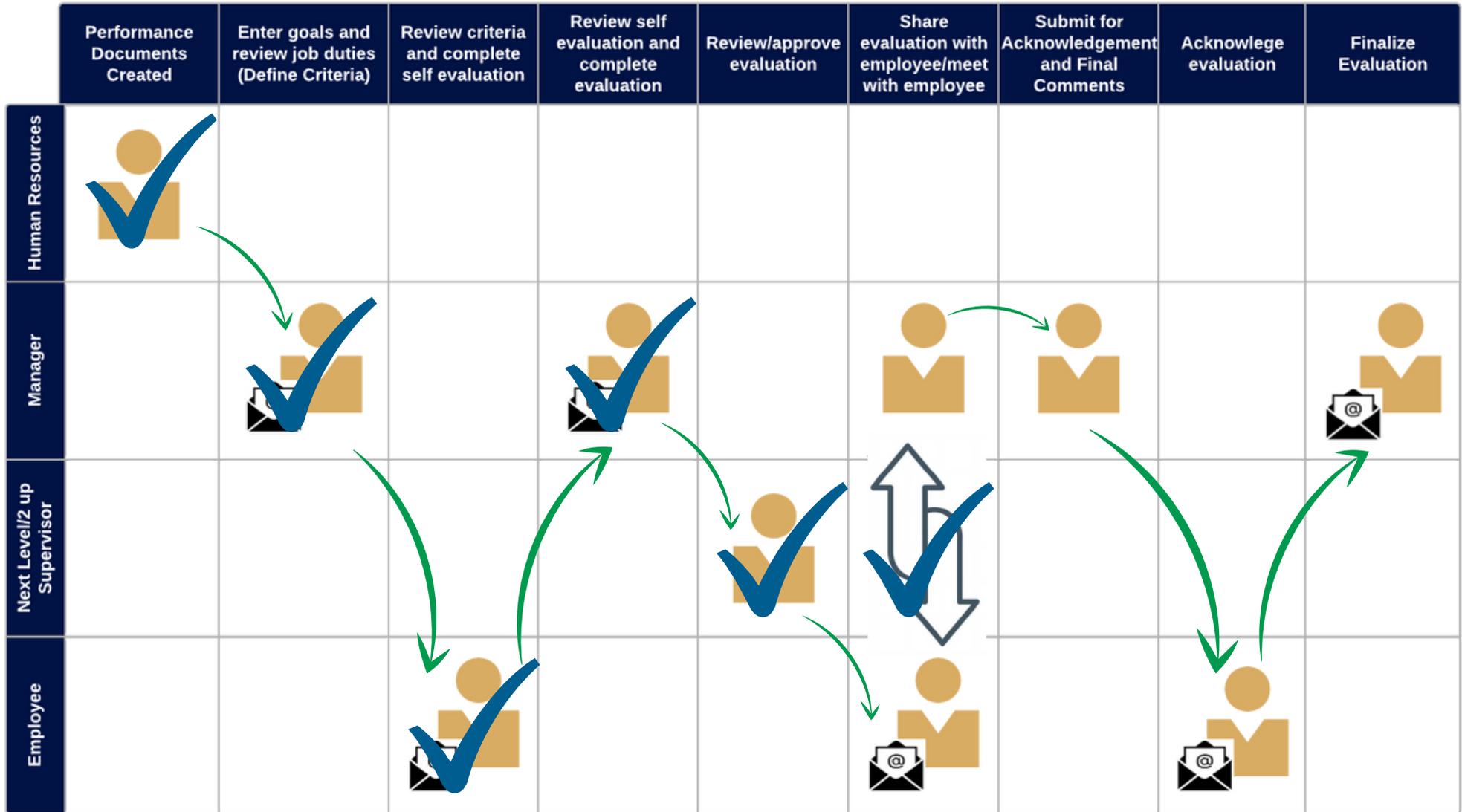
- \*Set goals that align with the strategic plan, our strategic pillars and the values of the University.
  - \*Ask the employee about any job specific goals that are meaningful to them.
  - \*Set SMART goals (specific, measurable, achievable, relevant and time-based)
    - \*Don't be overly ambitious or unrealistic.
  - \*Set consistent goals for employees with similar responsibilities within your department.
- \*Goals may be centered around one of the following: Job description, project goals, behavioral goals, stretch goals

Note:

You will not be able to enter the new goals in the system at the time of this year's evaluation.



# ePerformance Process



 System Generated email notification

# MANAGER: REQUEST EMPLOYEE ACKNOWLEDGEMENT

The screenshot displays a web application interface for a performance review process. The main header is 'Performance Process'. The left sidebar shows a 'Steps and Tasks' list with 'Request Acknowledgement' highlighted in yellow. The main content area is titled 'Manager Evaluation - Request Acknowledgement' for 'Rosalind Calles'. It shows employee details, a 'Reopen' button, and a 'Goals Summary' section with a manager rating of 5.00. A large orange arrow points to the 'Request Acknowledgement' button in the top right corner, with the number '30' written next to it.

Performance Process

USG Annual Review for Staff

Manager Evaluation - Request Acknowledgement

Rosalind Calles

Actions

Job Title Human Resources Manager Manager Vickie Shaw

Document Type USG Annual Review for Staff Period 01/01/2021 - 12/31/2021

Template Enhanced Staff Template Document ID 7044

Status Shared with Employee Due Date 12/31/2021

Employee Data

Employee ID 0048921

Department 0350101 Human Resources, Office Of

This document is currently shared with the employee. After you have completed your discussion with the employee select the Request Acknowledgement button to notify the employee that this document is ready for their acknowledgement.

Reopen

Goals Job Duties Performance Factors Core Values Overall Summary Sign-off Remarks

Section 1 - Goals

Expand Collapse

Goal 1

Goals Summary

Summary Weight 25 % (not less than 25%)

Manager Rating 5 - Exemplary 5.00

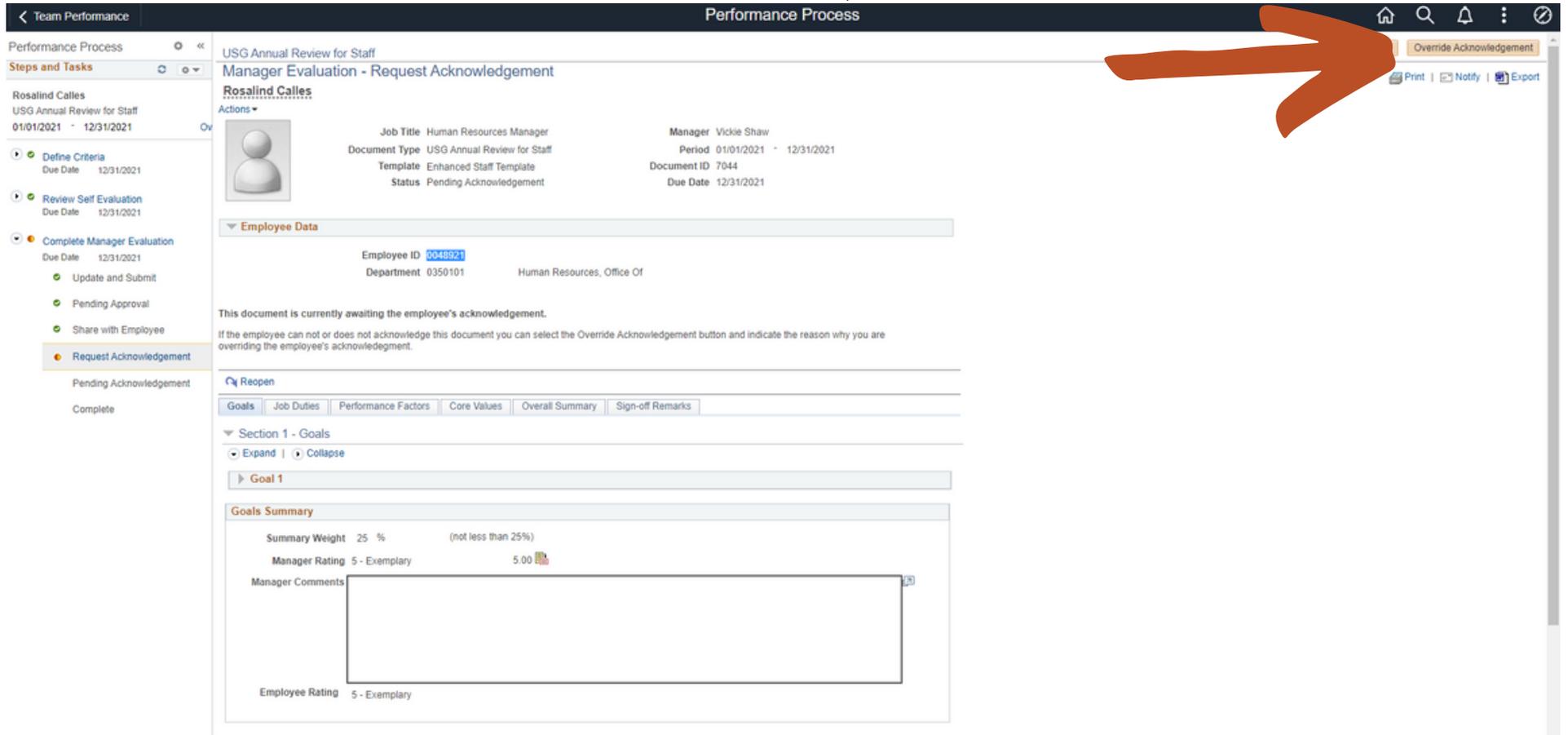
Manager Comments

Request Acknowledgement

Print Notify Export

30. Navigate back to the evaluation through Manager Self Service. Click Request Acknowledgement. This will give the employee a final opportunity to add comments to the evaluation and electronically acknowledge the document.

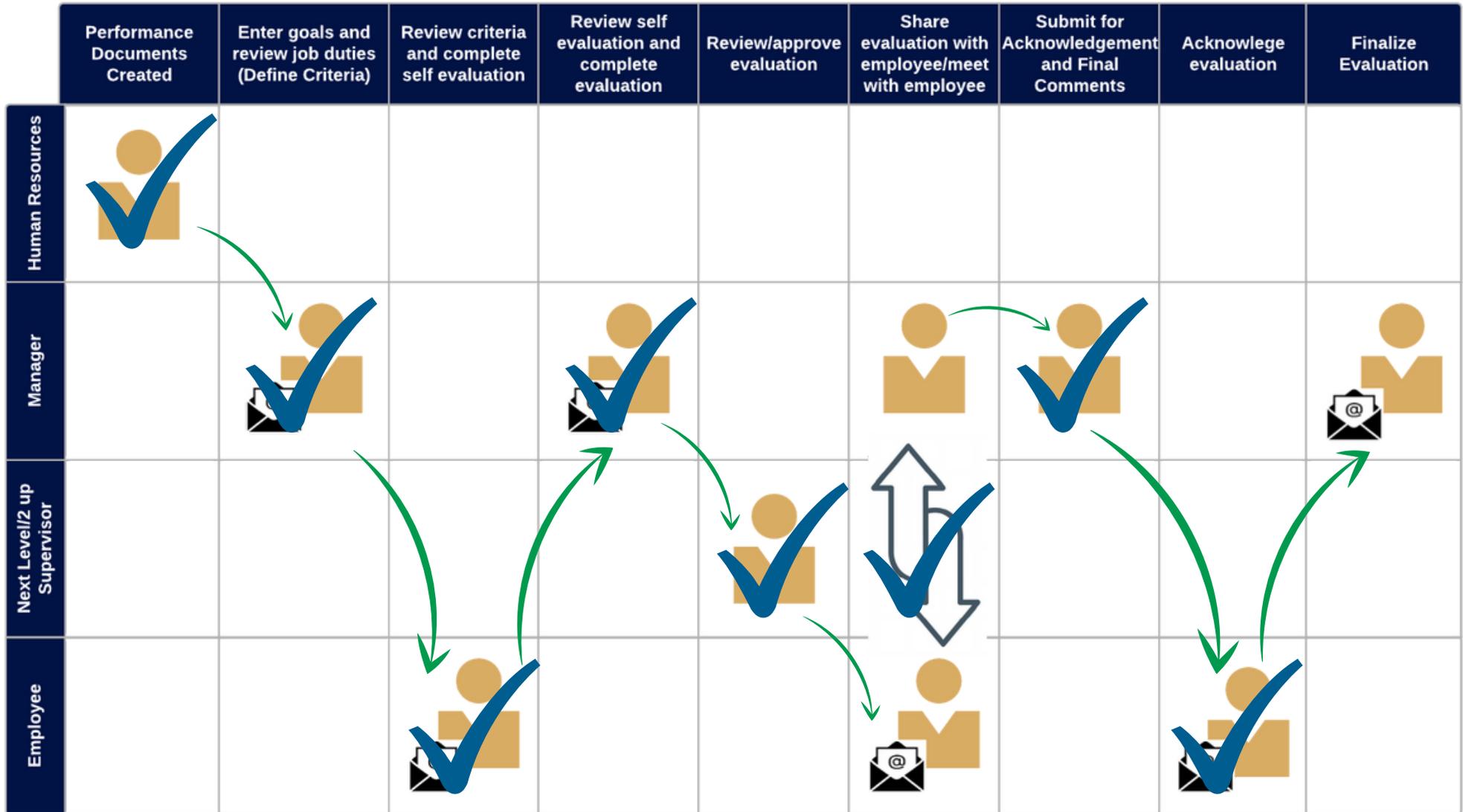
# MANAGER: OVERRIDE ACKNOWLEDGEMENT (rarely used)



The screenshot displays a web application interface for a performance review process. The main header is 'Performance Process'. The left sidebar shows a 'Steps and Tasks' list with 'Request Acknowledgement' selected. The main content area shows a 'Manager Evaluation - Request Acknowledgement' for Rosalind Calles. The document is in 'Pending Acknowledgement' status. A large orange arrow points to the 'Override Acknowledgement' button in the top right corner. Below the document details, there is a section for 'Employee Data' with fields for Employee ID (0048921) and Department (Human Resources, Office Of). A note states: 'This document is currently awaiting the employee's acknowledgement. If the employee can not or does not acknowledge this document you can select the Override Acknowledgement button and indicate the reason why you are overriding the employee's acknowledgement.' Below this, there are tabs for 'Goals', 'Job Duties', 'Performance Factors', 'Core Values', 'Overall Summary', and 'Sign-off Remarks'. The 'Goals' section is expanded, showing a 'Goals Summary' table with columns for Summary Weight (25%), Manager Rating (5 - Exemplary), and Employee Rating (5 - Exemplary). A large text area for 'Manager Comments' is also visible.

Managers can override acknowledgement by the employee if the employee departs the University or is on an extended leave before they acknowledge the evaluation. This option should rarely be used!

# ePerformance Process



 System Generated email notification

# MANAGER: COMPLETE EVALUATION

The screenshot shows the 'Manager Self Service' interface with a 'Team Performance' header. On the left is a navigation menu with options like 'Current Documents', 'Delegated Documents', 'Historical Documents', 'View-Only Documents', 'Approve Documents', and 'View Approval Status'. The main area displays a table of 'Current Documents' with 3 rows. The table columns are: Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. The first row shows Rosalind Calles (Human Resources Manager) with a status of 'Acknowledged'. The other two rows show Kathryn Edwards and Carissa Hendricks with a status of 'Define Criteria'.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Rosalind Calles Human Resources Manager	USG Annual Review for Staff	Acknowledged	01/01/2021 12/31/2021	12/31/2021
Kathryn Edwards Human Resources Manager	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021
Carissa Hendricks Human Resources Coordinator	USG Annual Review for Staff	Define Criteria	01/01/2021 12/31/2021	12/31/2021

Navigate to your assigned evaluations in Manager Self Service. You will note the document status as Acknowledged. This means the employee has reviewed and signed the document electronically. Click on the document.

The screenshot shows the 'Performance Process' interface for a 'USG Annual Review for Staff' document. The 'Steps and Tasks' list on the left includes 'Define Criteria', 'Review Self Evaluation', and 'Complete Manager Evaluation', with 'Complete' selected. The main area displays details for Rosalind Calles, including her job title (Human Resources Manager), manager (Vickie Shaw), and document status (Acknowledged). The 'Employee Data' section shows Employee ID 0048921 and Department 0350101. A message states: 'This Evaluation has been Acknowledged and is ready to be completed. If Approval is required you will need to select the Submit for Approval button to route the document to the appropriate approvers. If approval is not required then select the Complete button to finalize this document.' The 'Complete' button is highlighted in orange. A large orange arrow points to the 'Complete' button with the number '31' next to it.

31. Review the employee's final comments and click Complete.

# MANAGER: COMPLETE EVALUATION

The screenshot shows a 'Performance Process' window titled 'Complete Evaluation'. The main content area contains the text: 'You have almost finalized this document. If you have no further entries select confirm to complete this document. Upon selecting confirm, your electronic signature will be added to this document.' Below this text are two buttons: 'Confirm' and 'Cancel'. A large orange arrow with the number '32' points to the 'Confirm' button. On the left side, there is a 'Steps and Tasks' list with the following items: 'Define Criteria' (Due Date: 12/31/2021), 'Review Self Evaluation' (Due Date: 12/31/2021), and 'Complete Manager Evaluation' (Due Date: 12/31/2021). The 'Complete Manager Evaluation' step is expanded, showing sub-tasks: 'Update and Submit', 'Pending Approval', 'Share with Employee', 'Request Acknowledgement', 'Pending Acknowledgement', and 'Complete' (highlighted in yellow).

32. Confirm completion of the document. This submits the final document to the employee's historical documents and completes the evaluation process.

The screenshot shows a 'Manager Self Service' window titled 'Team Performance'. The left sidebar contains a list of document categories: 'Current Documents', 'Delegated Documents', 'Historical Documents' (highlighted in green), 'View-Only Documents', 'Approve Documents', and 'View Approval Status'. The main content area is titled 'Historical Documents' and contains a table with the following data:

Name / Job Title	Document Type	Document Status	Period Begin / Period End
 Rosalind Calles Human Resources Manager	USG Annual Review for Staff	Completed	01/01/2021 12/31/2021

# ePerformance Process



## Accessibility Statement

If you need this document in an additional format - reach out to Michael McLeod - 706-864-1440