

# MANAGER'S GUIDE

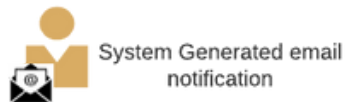
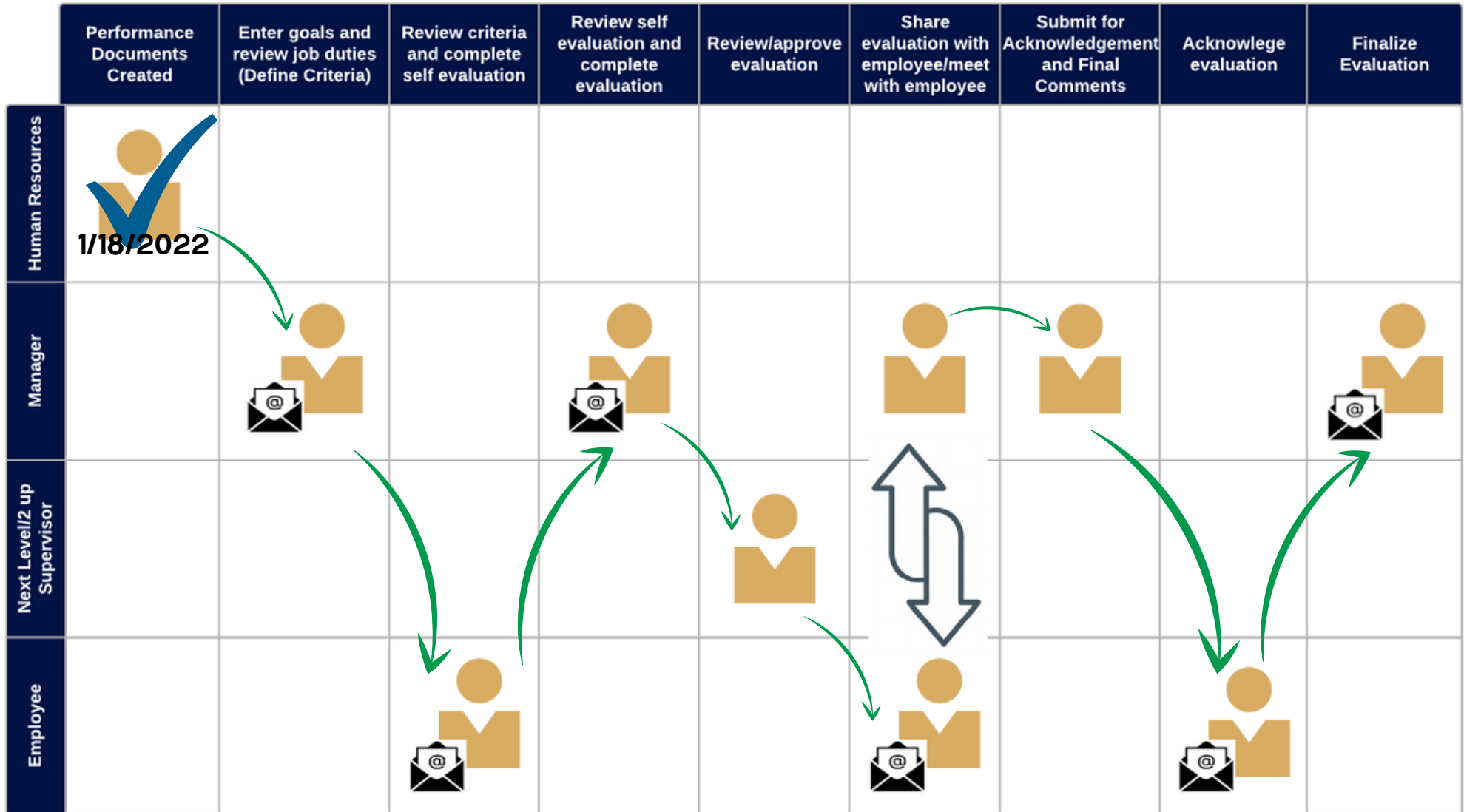
## ANNUAL PERFORMANCE EVALUATIONS

UTILIZING ONEUSG EPERFORMANCE MODULE

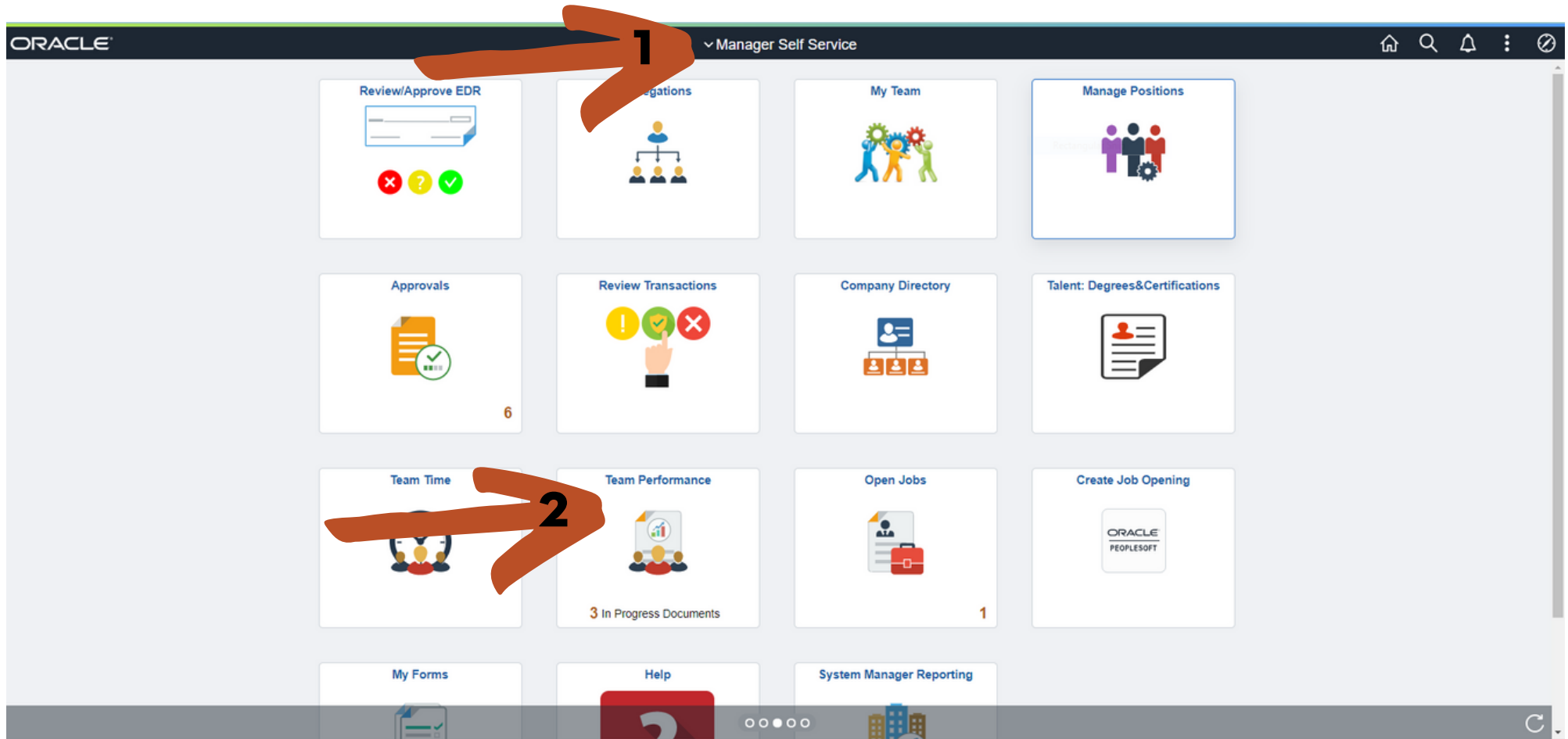
2022



# ePerformance Process



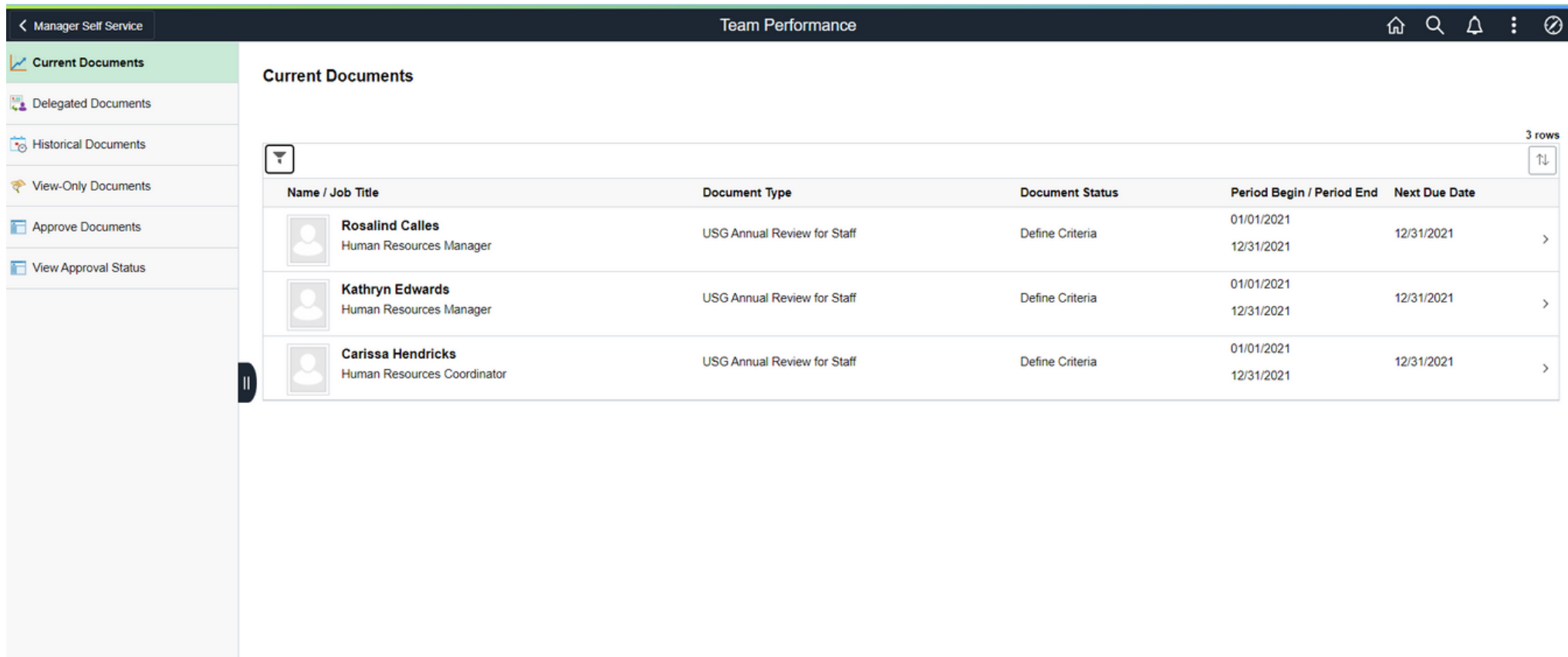
# MANAGER: NAVIGATING TO EVALUATIONS






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 displays the 'Manager Self Service' interface. The top navigation bar shows 'Team Performance' and includes icons for home, search, notifications, and settings. The left sidebar lists navigation options: 'Current Documents' (highlighted), 'Delegated Documents', 'Historical Documents', 'View-Only Documents', 'Approve Documents', and 'View Approval Status'. The main content area is titled 'Current Documents' and features a table with 3 rows. The table columns are: 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 for further action.

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 left sidebar lists steps: 'Define Criteria' (selected), 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main area is titled 'Define Criteria - Update and Approve' and includes a user profile for Rosalind Calles, job details (Human Resources Manager), and manager information (Vickie Shaw). Below this, there are instructions for reviewing performance criteria. The 'Goals' tab is active, showing 'Section 1 - Goals' with a weight of 25%. An 'Add Item' button is highlighted by a large orange arrow with 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%)

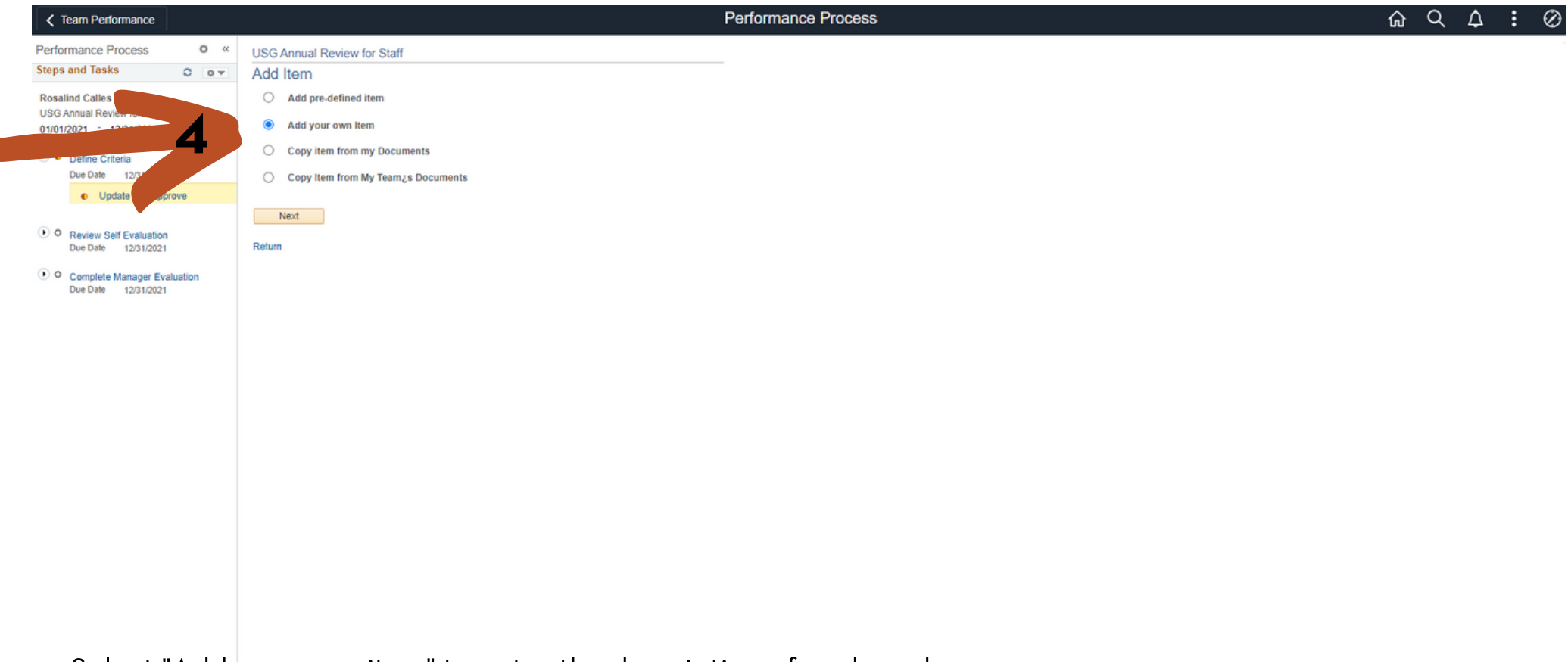
Audit History

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 displays the 'Performance Process' interface. On the left, a sidebar lists steps: 'Steps and Tasks', 'Define Criteria', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Define Criteria' step is highlighted with a large orange arrow and the number '4'. The main content area shows the 'Add Item' section with four radio button options: 'Add pre-defined item', 'Add your own Item' (selected), 'Copy item from my Documents', and 'Copy Item from My Team's Documents'. Below these options are 'Next' and 'Return' buttons. The top navigation bar includes 'Team Performance', 'Performance Process', and icons for home, search, notifications, and settings.

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

# MANAGER: DEFINE CRITERIA/GOALS

The screenshot displays the 'Performance Process' interface. On the left, a sidebar titled 'Steps and Tasks' lists the following steps: 'Define Criteria' (highlighted with a red arrow and the number 5), 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main content area is titled 'Add Your Own Item' and contains a form with the following fields: 'Title' (a text input), 'Description' (a rich text editor with formatting options like bold, italic, underline, and list), 'Start Date' (a date picker), and 'End Date' (a date picker). At the bottom right of the form is an 'Add' button, which is highlighted with a red arrow and the number 6. Below the 'Add' button is a 'Return' link.

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

The screenshot shows the 'Performance Process' interface for 'USG Annual Review for Staff'. The main heading is 'Define Criteria - Update and Approve'. The status is 'In Progress' and the due date is '12/31/2021'. The interface includes a sidebar with 'Steps and Tasks' and a main content area with tabs for 'Goals', 'Job Duties', 'Performance Factors', and 'Core Values'. The 'Job Duties' tab is active, showing a list of duties under 'Section 2 - Job Duties & Knowledge'. The list includes duties like 'Perform', 'Serve as liaison with various departments', 'Participate in project management', etc. The 'Expand' button is highlighted with an orange arrow labeled '8'.

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

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

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

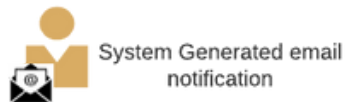
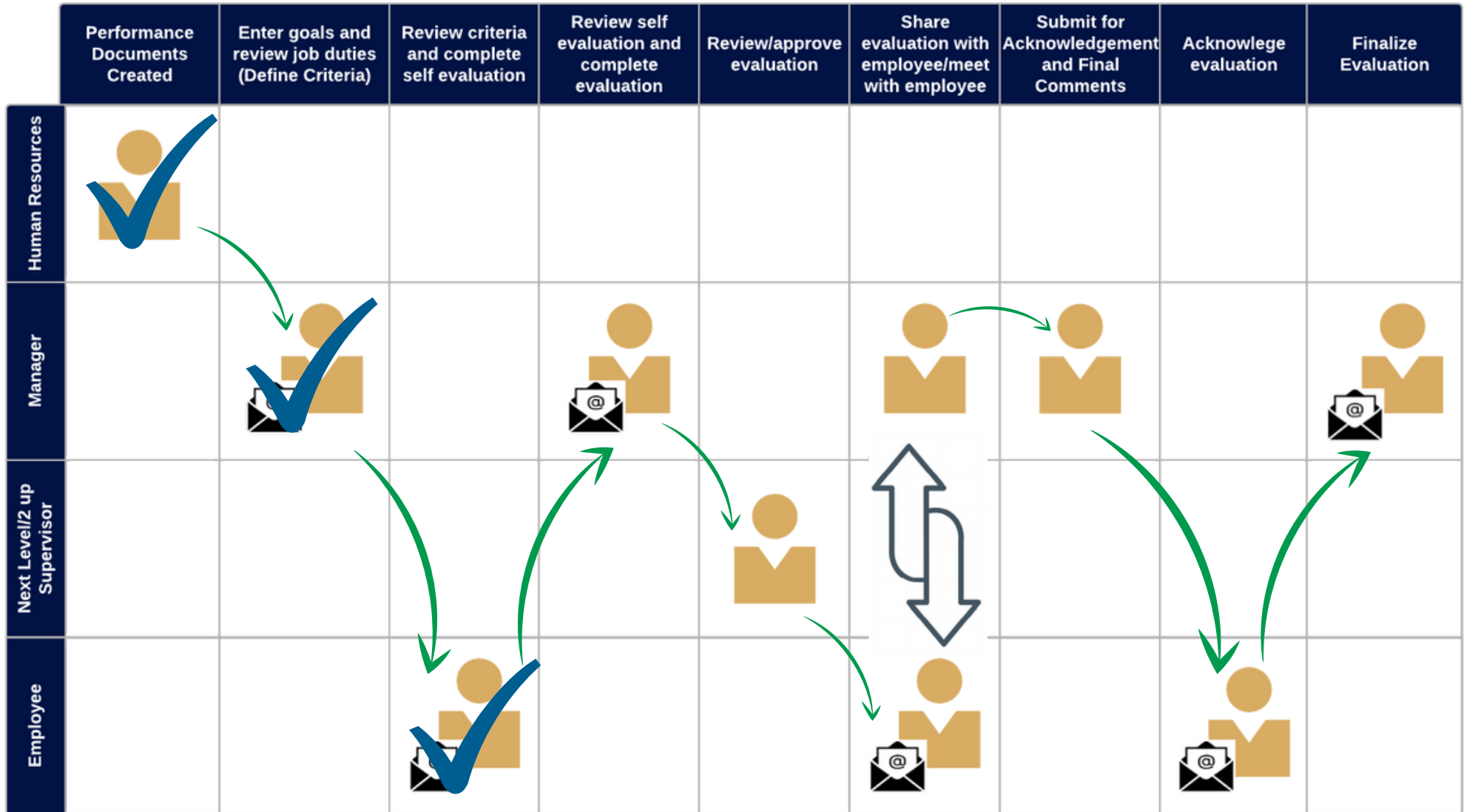
Print | Notify | Export

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



# MANAGER: REVIEW SELF EVALUATION

< Manager Self Service

Team Performance



Current Documents

Delegated Documents


Historical Documents

View-Only Documents


Approve Documents

View Approval Status

Current Documents



3 rows

**Rosalind Calles**  
Human Resources Manager


USG Annual Review for Staff

Evaluation in Progress

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

>

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

Actions

Job Title: Human Resources Manager

Document Type: USG Annual Review for Staff

Template: Enhanced Staff Template

Manager: Vickie Shaw

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

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

The screenshot shows the 'Manager Evaluation - Update and Submit' interface. On the left, a 'Steps and Tasks' sidebar lists: Define Criteria, Review Self Evaluation, Complete Manager Evaluation, Update and Submit, Pending Approval, Share with Employee, Request Acknowledgment, Pending Acknowledgment, and Complete. Callout 13 points to the 'Define Criteria' step. Callout 14 points to the 'Update and Submit' step. The main area shows 'USG Annual Review for Staff' and 'Manager Evaluation - Update and Submit'. It includes tabs for Goals, Job Duties, Performance Factors, Core Values, Overall Summary, and Sign-off Remarks. Under 'Section 1 - Goals', 'Goal 1' is expanded, showing a description: 'Provide Excellent Customer Service in the the Service Center'. The 'Manager Rating' is set to '5 - Exemplary' with a value of 5.00. The 'Manager Comments' field contains: 'I have received constant feedback from clients related to the service Rosalind provided them.' Below this is the 'Employee Rating' section, also set to '5 - Exemplary'. At the bottom, a 'Goals Summary' section shows a 'Summary Weight' of 25% and a 'Manager Rating' of 0.00. Callout 15 points to the 'Save' button in the top right corner.



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 shows the 'Manager Evaluation - Update and Submit' form. The left sidebar contains a 'Steps and Tasks' list with 'Update and Submit' highlighted. The main form area includes an 'Employee Rating' of 5 - Exemplary, a large text area for 'Employee Comments', a 'Goals Summary' section with a 'Summary Weight' of 25% and a 'Manager Rating' of 0.00, an 'Attachments' section with an 'Add Attachment' button, and an 'Audit History' section. The top right corner features a 'Save' button and a 'Submit for Approval' button. Red arrows labeled 16, 17, and 18 point to the 'Update and Submit' button, the 'Add Attachment' button, and the 'Save' button, respectively.

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

Team Performance | Performance Process

USG Annual Review for Staff

Manager Evaluation - Update and Submit

Steps and Tasks: Define Criteria, Complete Manager Eval, Update and Submit

Job Duty 1: Facilitate Employee Relations investigations

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

Manager Rating: 3 - Successful

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

Job Duty 2: Organize formal hearings

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

Manager Rating: 5 - Exemplary

Employee Comments: Developed a SOP for administrative parts of hearings.

5 POINT RATING SCALE

- 1 - Not Successful
- 2 - Partially Successful
- 3 - Successful
- 4 - Superior
- 5 - Exemplary

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 Acknowledgement

Pending Acknowledgement

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

## 5 POINT RATING SCALE

1 - Not Successful

2 - Partially Successful

3 - Successful

4 - Superior

5 - Exemplary

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

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

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

3 POINT RATING SCALE

1 - Not successful

2 - Emerging

3 - Successful

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

- 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

Manager Evaluation - Update and Submit

Rosalind Calles

Actions

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

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

< Team Performance

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

Submit for Approval

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.

Comments should be entered in the Overall Summary section to justify a Rating of a 1 or a 5.

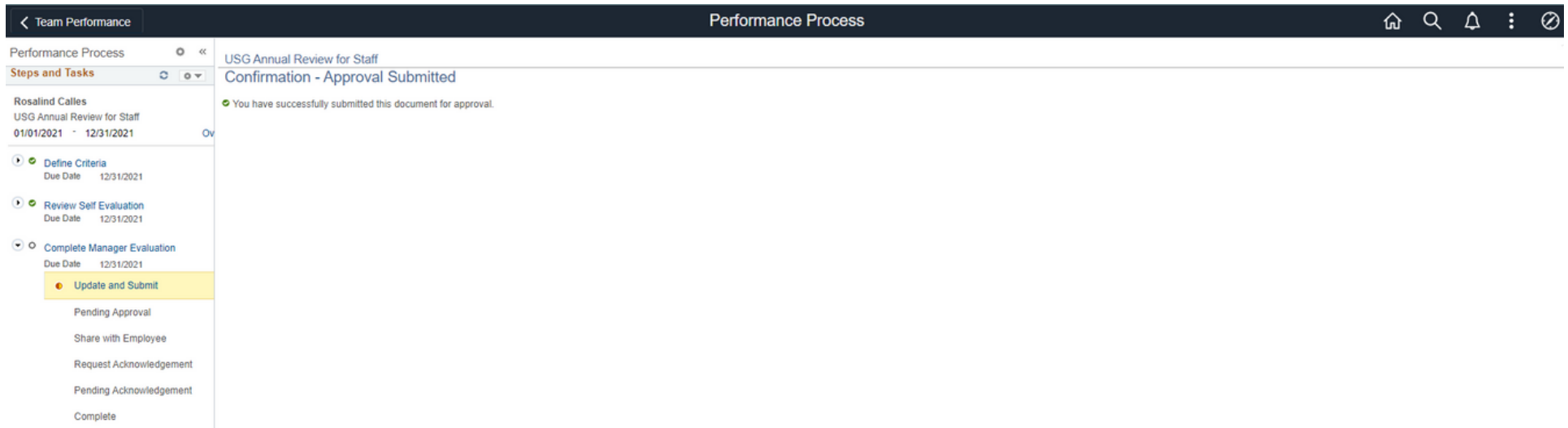
Confirm

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



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 'Manager Self Service' interface. On the left is a sidebar with navigation options: Current Documents, Delegated Documents, Historical Documents, View-Only Documents, Approve Documents, and View Approval Status. The main area is titled 'Team Performance' and contains a 'Current Documents' section with a table of evaluations. A notification panel on the right, titled 'Alerts (1)', shows a message: 'Performance of Rosalind Calles has been denied.' Below the table, there is a notification icon (bell) in the top right corner.

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. The left sidebar lists the steps: Define Criteria, Review Self Evaluation, Complete Manager Evaluation, and Update and Submit. The main area displays the 'Manager Evaluation - Update and Submit' for Rosalind Calles. A red notification at the bottom states: 'Approval has been denied for this Performance Document.' Below the notification, there are tabs for Goals, Job Duties, Performance Factors, Core Values, Overall Summary, and Sign-off Remarks.

**Employee Data**

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.

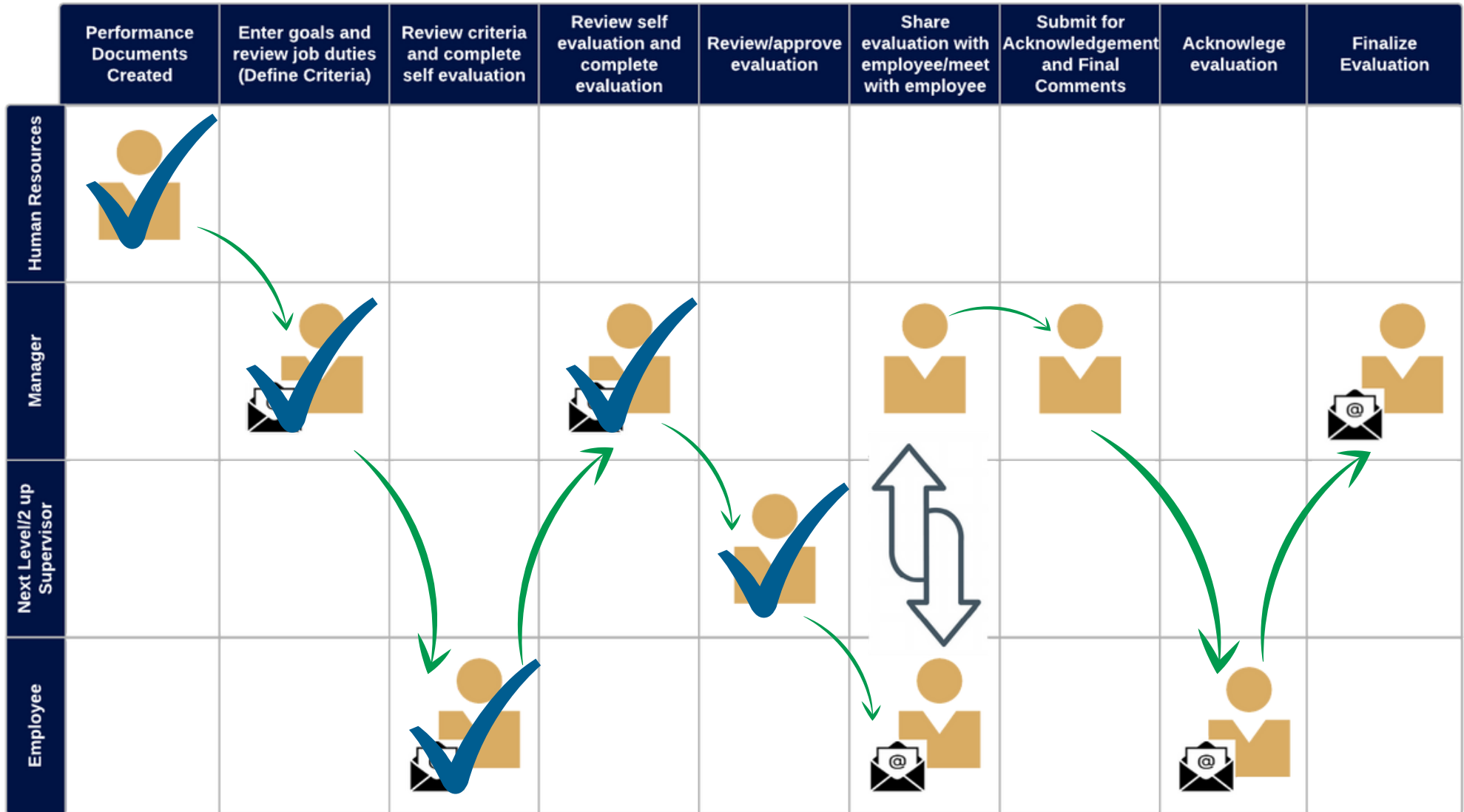
**Approval has been denied for this Performance Document.**

Calculate All Ratings

Goals | Job Duties | Performance Factors | Core Values | Overall Summary | 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



# MANAGER: SHARE WITH EMPLOYEE

The screenshot displays the Manager Self Service interface. The top navigation bar includes 'Manager Self Service' and 'Team Performance'. The left sidebar lists document categories: 'Current Documents', 'Delegated Documents', 'Historical Documents', 'View-Only Documents', 'Approve Documents', and 'View Approval Status'. The main area shows a table of 'Current Documents' with 3 rows. The first row, for Rosalind Calles, has a status of 'Approval - Approved', which is circled in red. The second and third rows are for Kathryn Edwards and Carissa Hendricks, both with a status of 'Define Criteria'. A red arrow labeled '27' points to the 'Approve Documents' link in the sidebar. Below the table, the 'Performance Process' section is visible, showing details for the 'USG Annual Review for Staff' for Rosalind Calles. The 'Share with Employee' button is highlighted in yellow, and a red arrow labeled '28' points to it. The 'Share with Employee' button is located in the top right corner of the 'Performance Process' section. The 'Performance Process' section also includes a 'Steps and Tasks' list on the left, a 'Goals' section, and a 'Goals Summary' table.

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

**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**

Section 1 - Goals

Goal 1

**Goals Summary**

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

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.

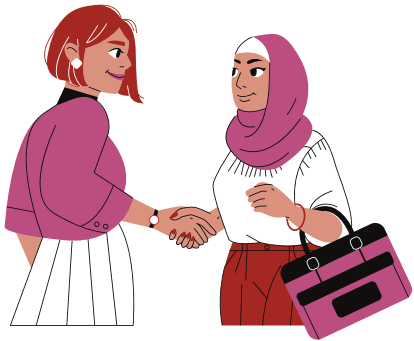
# MANAGER: CONFIRM SHARE WITH EMPLOYEE

The screenshot shows a web interface for a 'Performance Process'. The top navigation bar includes a back arrow, 'Team Performance', 'Performance Process', and icons for home, search, notifications, and a settings/cancel icon. The main content area is titled 'Share with Employee'. On the left, a 'Steps and Tasks' sidebar lists the process steps: 'Define Criteria' (Due Date: 12/31/2021), 'Review Self Evaluation' (Due Date: 12/31/2021), and 'Complete Manager Evaluation' (Due Date: 12/31/2021). Under 'Complete Manager Evaluation', the steps are 'Update and Submit', 'Pending Approval', and 'Share with Employee' (which is highlighted in yellow). Below 'Share with Employee' are the sub-steps 'Request Acknowledgement' and 'Pending Acknowledgement'. The main panel displays the instruction: 'Select confirm to share this document with the employee. Next, you should meet with the employee to discuss your evaluation.' At the bottom of this panel are two buttons: 'Confirm' and 'Cancel'. A large orange arrow with the number '29' points to the 'Share with Employee' step in the sidebar.

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:

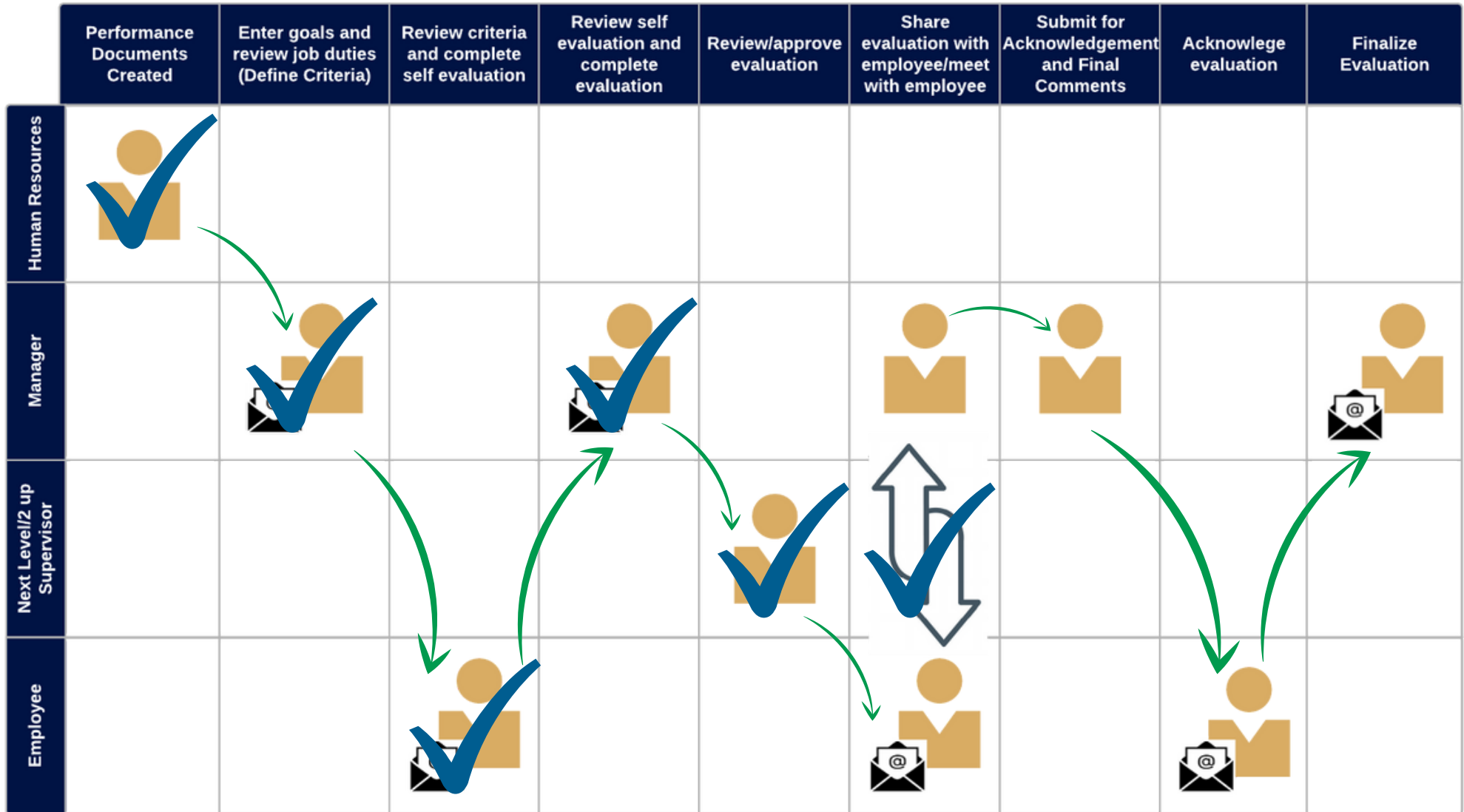
- \*Set goals that align with the strategic plan, our strategic pillars and the values of the University.
  - \*Ask the employee about any job specific goals that are meaningful to them.
- \*Set SMART goals (specific, measurable, achievable, relevant and time-based)
  - \*Don't be overly ambitious or 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:

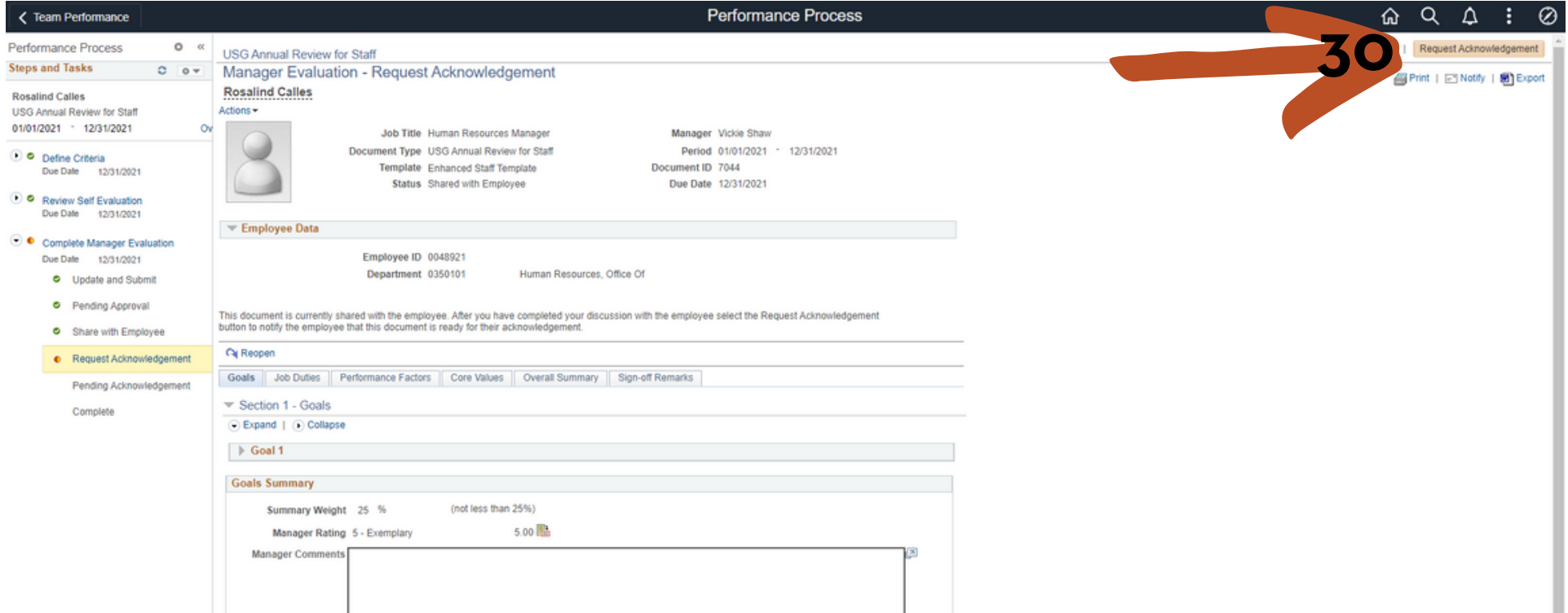
You will not be able to enter the new goals in the system at the time of this year's evaluation.



# ePerformance Process



# MANAGER: REQUEST EMPLOYEE ACKNOWLEDGEMENT



The screenshot shows the 'Performance Process' interface for a 'Manager Evaluation - Request Acknowledgement'. The page is titled 'USG Annual Review for Staff' and 'Manager Evaluation - Request Acknowledgement'. The user is 'Rosalind Calles'. The page includes a sidebar with 'Steps and Tasks' and a main content area with 'Employee Data' and 'Goals Summary'. A large orange arrow points to the 'Request Acknowledgement' button in the top right corner.

**Steps and Tasks**

- 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)

**Employee Data**

Employee ID	0048921
Department	0350101
Human Resources, Office Of	

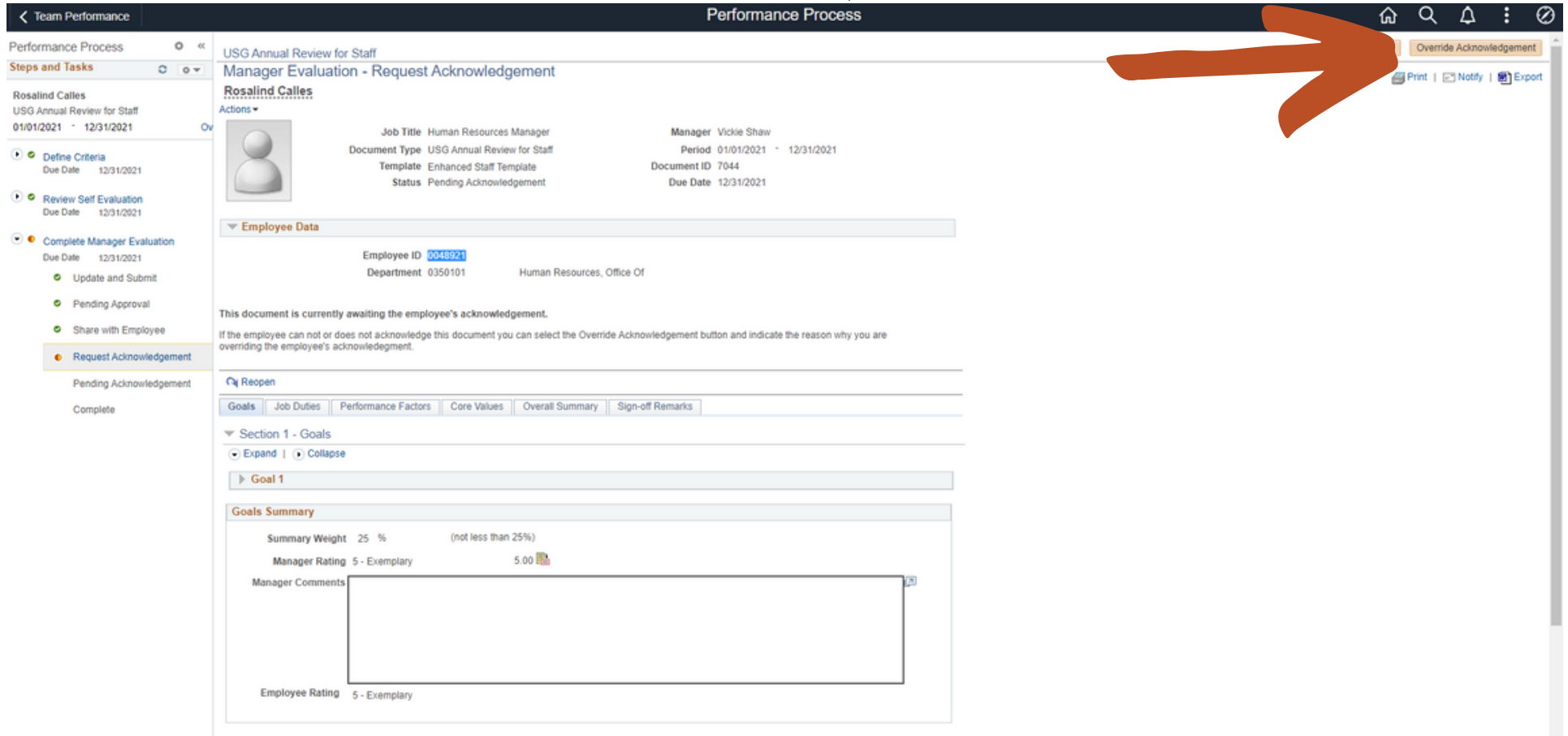
This document is currently shared with the employee. After you have completed your discussion with the employee select the Request Acknowledgement button to notify the employee that this document is ready for their acknowledgement.

**Goals Summary**

Summary Weight	25 %	(not less than 25%)
Manager Rating	5 - Exemplary	5.00
Manager Comments		

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 the 'Performance Process' interface for a 'USG Annual Review for Staff'. The main section is titled 'Manager Evaluation - Request Acknowledgement' for Rosalind Calles. A large orange arrow points to the 'Override Acknowledgement' button in the top right corner. The interface includes a sidebar with 'Steps and Tasks' (Define Criteria, Review Self Evaluation, Complete Manager Evaluation, Request Acknowledgement) and a main content area with 'Employee Data' (Employee ID: 0048921, Department: 0350101, Human Resources, Office Of) and a 'Goals Summary' section. The 'Goals Summary' shows a 'Summary Weight' of 25%, a 'Manager Rating' of 5 - Exemplary, and a 'Manager Comments' text area. The 'Employee Rating' is also 5 - Exemplary. The status of the document is 'Pending Acknowledgement'.

Performance Process

USG Annual Review for Staff

Manager Evaluation - Request Acknowledgement

Rosalind Calles

Actions

Job Title: Human Resources Manager

Document Type: USG Annual Review for Staff

Template: Enhanced Staff Template

Status: Pending Acknowledgement

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

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.

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

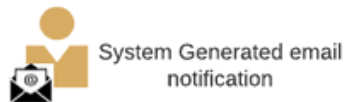
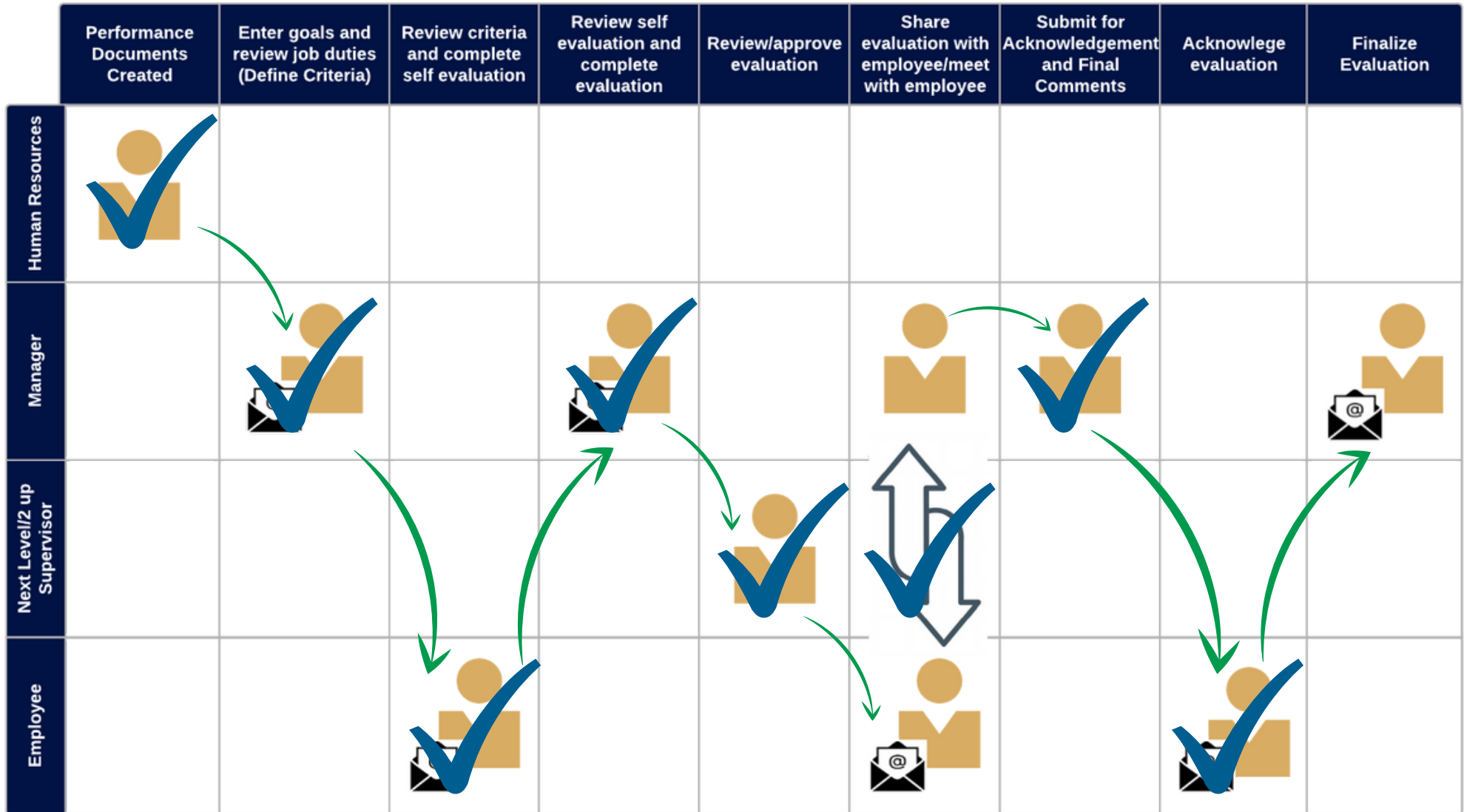
Employee Rating: 5 - Exemplary

Override Acknowledgement

Print | Notify | Export

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



# MANAGER: COMPLETE EVALUATION

< Manager Self Service

Team Performance

Home

Search

Notifications

More

Logout

Current Documents

Delegated Documents

Historical Documents

View-Only Documents

Approve Documents

View Approval Status

Current Documents

Filter

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

3 rows

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.

Team Performance		Performance Process			
<div>Performance Process</div> <div>Steps and Tasks</div> <div> <div>Rosalind Calles</div> <div>USG Annual Review for Staff</div> <div>01/01/2021 - 12/31/2021</div> </div> <div> <div>Define Criteria</div> <div>Due Date 12/31/2021</div> </div> <div> <div>Review Self Evaluation</div> <div>Due Date 12/31/2021</div> </div> <div> <div>Complete Manager Evaluation</div> <div>Due Date 12/31/2021</div> <div>Update and Submit</div> <div>Pending Approval</div> <div>Share with Employee</div> <div>Request Acknowledgement</div> <div>Pending Acknowledgement</div> <div>Complete</div> </div>		<div>USG Annual Review for Staff</div> <div>Manager Evaluation - Complete</div> <div>Rosalind Calles</div> <div>Actions</div> <div> <div> <div> <div>Job Title</div> <div>Human Resources Manager</div> </div> <div> <div>Document Type</div> <div>USG Annual Review for Staff</div> </div> <div> <div>Template</div> <div>Enhanced Staff Template</div> </div> <div> <div>Status</div> <div>Acknowledged</div> </div> </div> <div> <div>Manager</div> <div>Vickie Shaw</div> </div> <div> <div>Period</div> <div>01/01/2021 - 12/31/2021</div> </div> <div> <div>Document ID</div> <div>7044</div> </div> <div> <div>Due Date</div> <div>12/31/2021</div> </div> </div> <div>Employee Data</div> <div> <div>Employee ID</div> <div>0048921</div> </div> <div> <div>Department</div> <div>0350101</div> <div>Human Resources, Office Of</div> </div> <div> <div>This Evaluation has been Acknowledged and is ready to be completed.</div> <div>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.</div> </div> <div>Reopen</div> <div> <div>Goals</div> <div>Job Duties</div> <div>Performance Factors</div> <div>Core Values</div> <div>Overall Summary</div> <div>Sign-off Remarks</div> </div> <div>Section 5 - Employee's Acknowledgement Comments - These comments only appear after the Acknowledgement step</div> <div> <div>Employee Acknowledgement Comments</div> <div>We have met and I feel this was a fair evaluation of my performance. I understand the areas where I need to focus in the next year.</div> </div>			

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

# MANAGER: COMPLETE EVALUATION

**Team Performance** | Performance Process

**Performance Process** | **Complete Evaluation**

**Steps and Tasks**

- 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**

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.

**Confirm** **Cancel**

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

**Manager Self Service** | Team Performance

**Historical Documents**

Name / Job Title	Document Type	Document Status	Period Begin / Period End
<b>Rosalind Calles</b> 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