Department of Pediatrics
Online Staff Performance Review
How-to Instructions for Creating an Evaluation

PREPARATIONS BEFORE CREATING THE EVALUATION: An updated job description for the employee being evaluated is needed. The supervisor will need to collect the Employee Self-Assessment and Feedback forms prior to creating the evaluation. The supervisor should review notes from periodic reviews; the employee’s self-assessment and feedback forms; and observable behavior, performance and outcomes that occurred during the review period. This information should be used to prepare the online evaluation and to prepare for the performance review meeting with the employee.

SETTING UP THE EVALUATION:

You can access the Performance Management Tool through Pediatrics’ Intranet. The link can be found under Human Resources, Policies Guidelines & Forms, Health Sciences Performance Management Process, and Performance Management Tool. You will need your CIS credentials to logon.
http://www.ped.med.utah.edu/pedsintranet/resources/health_sciences_evaluation.htm

Select “My Employees,” to view a list of the employees that you supervise.

Select the icon next to the name of an employee to start a new evaluation. The employee’s name becomes a hyperlink. Click on the employee’s name to access the evaluation.

EMPLOYEE PROFILE: Employee information pulls from PeopleSoft. Verify the accuracy of the information in the Employee Profile section and report any changes to the Pediatrics HR office.

• Enter the review period - 2015 annual evaluation, 3 or 5 month evaluation (required for new hires and transfers) or other time period. This can be in any format.

• The Allow Employee to Self-Evaluate feature is optional, but highly recommended. You can grant the employee access to rate him/herself in each section (Behavior Standards, Responsibilities and Prior Goals) by selecting this feature.

• Do not select Self-Evaluate until the responsibilities (essential functions) have been input or updated. Do not rate the employee before allowing the employee to self-evaluate.

RESPONSIBILITIES: Enter the responsibilities (essential functions) from the employee’s job description (can copy and paste). You can add additional fields if needed. You must DELETE empty fields. For subsequent reviews, the responsibilities will auto-populate from the initial input and will be editable. The New/Prior Goals, Professional Development Plan and Supervisor Resources sections can be filled in now or when the supervisor meets with the employee.)
Give the employee instructions on how to access their Employee Profile to complete her/his Self-Evaluation. Once the employee has completed their self-evaluation (clicks on the End Self Evaluate button), their ability to data enter information is removed. The supervisor will know this has been completed when the status changes from **Self** to **Open**.

NEW GOALS: Enter new goals and/or work objectives for the next review period. These goals will auto-populate into the Prior Goals section for rating on subsequent reviews. (This section can be filled out when you meet with the employee.)

PROFESSIONAL DEVELOPMENT PLAN: List the Professional Development Plan (career or professional development activities) for the upcoming review period. List any training or other professional development required to facilitate achievement of the stated goals for the upcoming review period. (This section can be filled out when you meet with the employee.)

SUPERVISOR RESOURCES: Outline the support the employee will need from the supervisor to obtain the defined goals.

DOCUMENT UPLOAD: Upload the Employee’s Self-Assessment, Feedback forms and any other documentation relevant to this evaluation.

COMPLETE RATINGS:

- After the employee completes the self-evaluation and clicks End Self-Evaluation, the supervisor will see the employee’s ratings. The employee’s ratings will appear as the default in the evaluator section. The rating can be changed when necessary.

- Complete the ratings in the Behavioral Standards, Responsibilities and Prior Goals section before meeting with the employee. Comments are required for “L” and “D” ratings and are strongly encouraged for “M” or “H” ratings. Click on the \[ \] icon to add a comment. If any of the supervisor’s ratings differ from the employee’s, the supervisor should be prepared to discuss the reasons behind their rating.

- If an “L” (Not Meeting Expectations) rating is warranted, the supervisor should document specific examples/support for the rating in the Comments section of the evaluation form, in addition to the improvements that must take place.

Before moving to the next section of the evaluation, the supervisor should have met with the employee in person to review and discuss the evaluation.

SETTINGS: On the Settings tab (above Expectations of Rating), you can change how each area of the evaluation is weighted. After the evaluation is complete, the Evaluation Formal Scores (and signature fields) will be visible at the bottom of the evaluation.
**EVALUATION WORKFLOW:** After all of the fields are complete, you can either sign the evaluation or send it to others to **View, Comment on or Sign**, by assigning the appropriate role in the **Evaluation Workflow** section of the evaluation. If any field on the evaluation is left blank, the **Route to workflow** and **Submit** buttons will not be active.

If others have been set up to **View, Comment on or Sign** an evaluation, an auto-generated email will be sent out notifying each individual of their role, along with the link to access the evaluation. After the individual has completed their assigned role, he/she will need to click the **Submit** or **Route to workflow** button to move the evaluation to the next person in the work flow. (Refer to **Proxy Rights** sections at the end of this document for instructions on setting up a proxy evaluator.)

**The next level supervisor/leader must be set up to Sign the evaluation.**

**COMMENTS:** Supervisor comments should be entered after all other information has been reviewed. This can be a summary of the overall review.

**EVALUATION FORMAL SCORES:** After the supervisor has routed to the workflow or submitted the evaluation, the “Evaluation Formal Scores” and the Signature field(s) will be visible.

- Evaluation Formal Scores will not be used as the sole basis for determining fiscal year salary increases. Rather, the ratings and comments in the evaluation, in addition to the formal scores, will be taken into consideration along with other factors.

**SIGNATURES (FINALIZING THE EVALUATION):** The signature role becomes available ONLY after all other assigned roles have been completed. If others are set up to sign the evaluation, an auto generated email will be sent notifying the signer to review and sign the evaluation, along with a link to access the evaluation.

To sign the evaluation, type your name in the yellow box next to your name, then click the **Submit** button. If the box next to your name is not yellow, this means that the evaluation is not ready for your signature (others in the work flow have not yet completed their role).

After you have signed the evaluation, an auto generated email will be sent to the employee notifying the employee to review and sign their evaluation that includes a link to access the evaluation. The evaluation is **CLOSED** after the employee signs their evaluation.
PRINTING THE EVALUATION: Once a review is closed (both the supervisor and employee have signed the evaluation) there will be a Print Form button in the upper left hand corner of the employee profile (top of the form). The evaluation will print in its entirety, including the notes.

COMPLETED EVALUATIONS – You can access completed evaluations on the Staff Performance Review Portal home page. Click on “My Employees” then on the icon in the “History” column next to the name.

PROXY RIGHTS – How to assign someone else rights to complete an evaluation.

To assign someone else rights to complete an evaluation, you will need to open the evaluation for whom you want to grant proxy rights.

Scroll to the bottom of the evaluation to the “Evaluation Workflow” section. In the “Action” field, select “Proxy Evaluate” and in the “Name” field, type the supervisor’s name you want to grant proxy rights, select the name, then click the “Add” button.

The “Proxy Evaluator” section will appear. Click on the “Activate” button to grant access. To remove proxy access, click the “Remove” button.

NOTE: If you assign someone rights to Proxy Evaluate, DO NOT assign them rights to Sign. A proxy evaluator signs by default.