**Supervisor Self Service – How to complete the Performance Evaluation form for your employee(s)**

**Helpful Tip:** Prior to initiating the year-end performance evaluation, please ask your employee to ensure their training summary in their online center is up to date. Also, review the progress on projects/goals, job knowledge areas, and professional skills.

1. Login to the Online Center / Click the Supervisor Self Service Option



2. Click the Performance Evaluation Status tab.
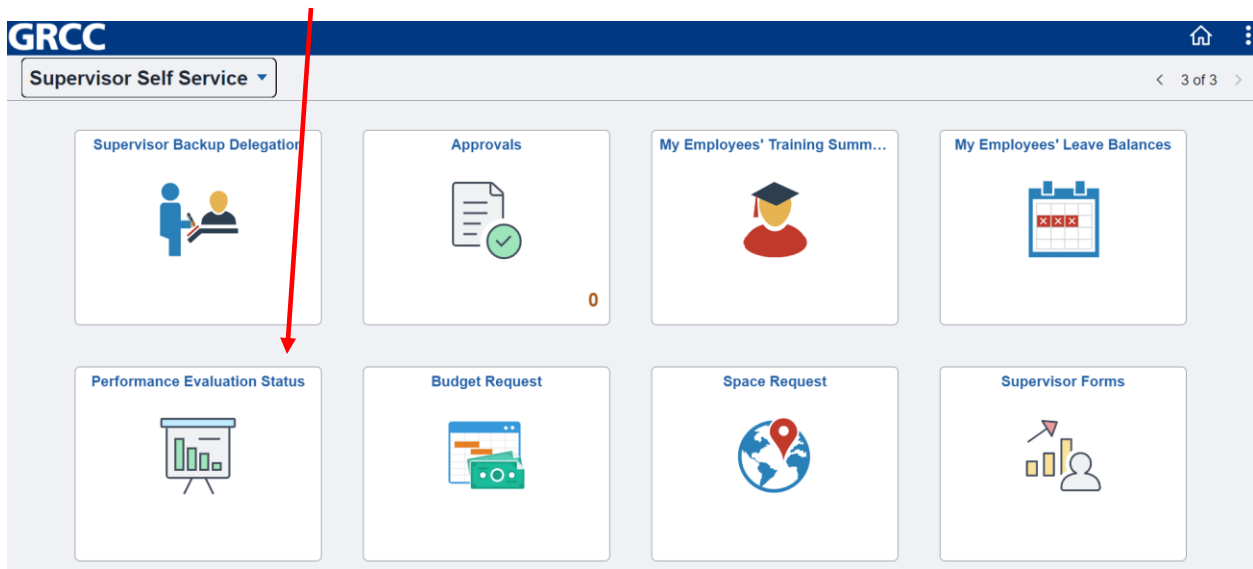
3. Your employee ID should automatically populate. If it does not, enter your employee ID number and click Search.



4.
The evaluation status page will populate a list of employees who report directly to you.

5. Review the current status of the initial plan and mid-year evaluation of your selected employee. If the initial plan or mid-year is not complete, this will need to be done prior to being able to start the year-end review. The key to understand the status is also on this page.



6. To begin the year-end evaluation, click the edit button. This will populate the year-end review form, including the information entered from the initial and mid-year evaluation. During the course of completing the year-end review, you can view the status on this page (use the key to the right).

7. Once you click edit in the prior screen, select the employee name from the drop down. Click Next to proceed.

**Year End Performance Evaluation**

The purpose of the Performance Evaluation process is to record your planned work this fiscal year – established from your individual goals, department action plans, and/or College Action Plan – and monitor your progress (Section I). Section II allows you to discuss professional development goals for the upcoming year and to monitor your required professional development hours. In addition, this evaluation assesses the effectiveness of your job performance for this fiscal year (Section III).

- **Initial Evaluation:** To be completed between July 1 through August 31.
- **Mid-Year Evaluation:** To be completed by February 1.
- **Final Evaluation:** To be completed by the supervisor in May and submitted to HR by June 1

In preparation to complete the Final Evaluation, please review the projects and outcomes, professional development, and the top five job responsibilities from the job description prior to meeting with your employee. To access the evaluation, select the Employee from the dropdown menu and click 'Next'.
At any time in the evaluation process, you may navigate through the evaluation pages using the 'Previous' button to return to the page prior, or the 'Next' button to progress to the next page. If you need to exit the form prior to submitting, click the 'Save' button prior to exiting.

**Select Employee**

Empl ID

Employee

**Employee Information**

| | | |
|---|---|---|
| Name | Supervisor Name | |
| Employee Emplid | Supervisor Emplid | Supervisor information will populate here |
| Business Title | Empl Record | |
| Fiscal Year 2021-2022 | Fiscal Year 2022 | |
| Evaluation Type NONE | | |
| Standard Hours 0.00 | | |

[ Next ]  [ Save and Exit ]

8. Projects and Goals is the first section. You will see the text from the initial and mid-year performance evaluations populated. **Evaluate and comment on the progress for each goal in their respective fields. These fields are required.** The comment fields do not have character limits. You may add or remove projects by utilizing the Insert a Row or Delete a Row buttons.

| ‹ Performance Evaluations | | | | Form Page | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|

**Projects and Goals**

Evaluation of project work (from individual, department action plans, or College Action Projects).

Please evaluate the identified projects and goals using the available ranking system within the Evaluation field. Comments are required for each item. If additional items were assigned since the Mid-Year Evaluation, you may click the '+' to insert a new row. To remove a project, click the '-' to delete a row.

1 row

| | Goal ◇ | Outcome 1 ◇ | Outcome 2 ◇ | Outcome 3 ◇ | Mid Year Review ◇ | *Evaluation ◇ | *Comment ◇ | Points ◇ | Insert A Row | Delete A Row |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Complete Performance Evaluation | Meet with Employee throughout | | | Successful initial meeting & goal setting. | 3 - Highly Effective | Successful mid-year meeting. Excellent progress on goal. | 3 | + | − |

**Helpful Tip:** You may expand any comment fields by clicking & dragging the downward arrow in the bottom right corner of the comment box.

9. At the bottom of each page, you will see the weighted value of the section on the overall evaluation, as well as the average score for the section based upon your evaluation ratings.



**Goals and Projects Summary**

Goals and projects are weighted at 40% of evaluation. The result will be added to the final evaluation score.

Goals/Projects Total Points    0              Goals/Projects Score (Average)    0.00

[Previous]  [Next]  [Save and Exit]

<mark>Helpful Tip:</mark> You may navigate through the performance evaluation by utilizing the Previous or Next buttons. Your work will automatically be saved upon clicking Next, however, if you need to exit the evaluation, please click the Save and Exit button.

- Note: The Save and Exit button will only be available prior to the evaluation being submitted to the employee.

10. Professional Development is the second section. You will again see the text from the initial and mid-year performance evaluations populated, although it cannot be edited at this time. Instead, you will populate the employee's completed trainings as listed in their Training Summary in the following steps.
    a. First, if an employee needs an exception for their required hours, please click the 'Needs Exception?' toggle to reflect Yes. You may now enter the new required hour value, as well as a reason for the exception. These fields are required when an exception is specified.
        - **Note**: The information within the Scale field will automatically adjust according to the new Required Hours entered.

*The below screen shot shows an example of an exception to the employee's required hours. The toggle has been set to yes, required hours set to 15, and a reason that the employee was on an extended leave was entered. The scale information automatically adjusted to reflect the new required hours total of 15.*

**Instructions**

In addition to learning activities previously identified, the employee's completed/enrolled training from their training summary will be populated. The completed training summary will only load once, upon initiation of the final evaluation. You may refresh the data by clicking the "Reload from Training Summary" button. Please review the completed Professional Development opportunities and total hours.

If an employee has planned external professional development that has not yet taken place, those sessions may be manually added by clicking the '+' to insert a new row within the Completed Training section. If the training summary information has been reloaded, any future external professional development must be re-added.
Personal/wellness development, volunteering, and/or community involvement related to GRCC work, for the purpose of this section, will be limited to 5 hours. Please utilize the "Other (Wellness/Volunteer)" toggle to identify sessions fitting this description.

**Expected Professional Development Hours**

Listed below is the standard professional development hours required for a full-time employee (32.5 hours per week or more). In some instances, the employee's hours may need to be adjusted. Examples include extended leaves of absence, position transfers, or situations outside of the employee's control. If an employee's hours require adjustment, please click the 'Needs Exception' toggle to reflect 'Yes' and enter in the correct hours required. A reason for the exception will also be required.
Should you have any questions on adjusted hours, please contact Human Resources.

| | |
|---|---|
| *Required Hours | 15.00 |
| Needs Exception ? | Yes |
| *Reason | Employee was on an extended leave of absence. |
| Scale | 3 Points: 15 hours or more<br>2 Points: 11.25 up to 15 hours<br>1 Points: 0 up to 11.25 hours |

b. Next, the employee's Training Summary information will automatically populate. If changes have been made since initiating the form, **please click the 'Reload from Training Summary' button**. You may add entries to this section by clicking the Insert a Row button, but please note these sessions would need to be re-added if the 'Reload from Training Summary' button were to be clicked again.
- **Note:** Training sessions specified as wellness in PeopleSoft will automatically be assigned as a wellness/volunteer course. The form will limit the total wellness/volunteer hours to 5. Any hours above this limit will not count toward the total completed hours.

**Reload from Training Summary**

**Completed Training**

16 rows

| | Date | Class/Training/Conference | Internal/External | Other (Wellness/Volunteer) | Actual Hours | Valid Hours | Note | Status | Insert A Row |
|---|---|---|---|---|---|---|---|---|---|
| 1 | 10/12/2020 | How To Stay Secure At Home | Internal | No | 1.00 | 1.00 | | Completed | + |
| 2 | 10/21/2020 | FMLA-What's in it for you? | Internal | No | 1.50 | 1.50 | | Completed | + |
| 3 | 11/06/2020 | Mindful Eating | Internal | Yes | 1.00 | 1.00 | | Completed | + |
| 4 | 11/18/2020 | Gentle Yoga | Internal | Yes | 5.00 | 4.00 | Max Wellness (5 hours) Reached | | + |
| 5 | 11/16/2020 | Evidence Based Selection | Internal | No | 1.50 | 1.50 | | Completed | + |
| 6 | 11/18/2020 | Recruit Your Barista | Internal | No | 1.00 | 1.00 | | Completed | + |
| 7 | 01/07/2021 | Learning Day 2021 | External | No | 6.00 | 6.00 | | Completed | + |
| 8 | 02/02/2021 | Student Surveys/Data Reporting | Internal | No | 1.50 | 1.50 | | Enrolled | + |

**Helpful Tip:** You may click the toggle to specify any training as fitting the wellness/volunteer category, or remove any trainings from this classification.

11. In section three, Job Knowledge, please **evaluate and comment on each job knowledge area listed in their respective fields. Please note these fields are required.**
    a. **Note:** only the first 3 entries will appear. Scroll down to see the remaining job knowledge areas.



12. The final section is Professional Skills. **Please evaluate and comment on each job knowledge area listed in their respective fields.**
    a. **Note:** Evaluation and comment fields are required for each professional skill, with the exception of Supervision/Management Skills as this may not be applicable to all employees.



13. Once you have updated the performance evaluation, a final evaluation summary will appear. Please review the information listed within this page for accuracy. If all information is correct, click the Next button to proceed.
    a. **Note:** If corrections are needed, you may navigate to the desired section(s) using the Previous/Next buttons. You may also click Save and Exit at any time prior to submitting to the employee.

**Professional Skills Summary**

Professional Skills is weighted as 25% of evaluation.

Professional Skills Score  2.50

Points  0.63
toward final evaluation

**Final Evaluation Score and Merit Increase**

*The merit increase is a recommendation based on the employee's performance. The Board of Trustees will review the budget in June to determine the merit compensation increase. Contingent upon approval, Human Resources will seek the final recommendation and implement the merit increase effective July 1.*

Employee Quartile  1

Final Evaluation Score  2.78

Merit Increase Recommendation  2.50

| Previous | Next | Save and Exit |
|----------|------|---------------|

14. The last step of the evaluation is to submit to the employee for their review and acknowledgement. Once complete, you may click:
    a. **Save and Exit** if you have yet to review the evaluation with the employee. If this still needs to take place, Human Resources recommends you schedule a time to meet with the employee and go through each page of the evaluation together. Making edits (if necessary) as you have your discussion.
    b. **Submit** if you have met with the employee and you are ready to have them approve the form.

**NOTE: By Submitting this form to your employee, you approve of the information contained within.**

< Back          Performance Evaluations          🏠  ⋮  ◉

➕ Year End Review : Last Step          Form ID 106066

**Last Step**

When you are finished with the evaluation, click 'Submit' to route to your employee for review and approval.

▸ Comments

| Previous | Save and Exit | Submit |
|----------|---------------|--------|

15. After you have submitted the form to the employee for review, a transaction summary for the evaluation will populate on the Form Result page.

**Note:** The employee will need to login to their Online Center and go to Employee Self Service to review/acknowledge the evaluation. Please refer to the separate set of instructions to view the performance evaluation as the employee.

**Helpful Tip:** You are able to print a copy of the final Performance Evaluation from the Form Result page. After you submit to the employee, click on the Print Button, then from the drop-down menu select Year End Full Report and click the Print button within the pop-up window.



Below is a sample of the performance evaluation plan that will populate.

# Final Performance Evaluation
## 5/1/2021

**Employee:**                                              **Supervisor:**

**Title**:

**Year**:  2020-2021

**Projects and Goals**

| | | Evaluation | Score | |
|---|---|---|---|---|
| • | Complete Performance Evaluation | Highly Effective | 3 | |
| | | Average for Projects and Goals Score | | 3.00 |

**Professional Development**                                    Completed Hours:  15

| | | | |
|---|---|---|---|
| | Professional Development Score | | 3.00 |

**Job Knowledge**

| | | | | |
|---|---|---|---|---|
| • | GRCC's Mission, Vision, Values & Goals | Highly Effective | 3 | |
| | | Job Knowledge Score | | 3.00 |

**Professional Skills**

| | Evaluation | Score |
|---|---|---|
| • Supervision/Management skills (if applicable) | | |
| • Leadership | Highly Effective | 3 |
| • Communication skills | Highly Effective | 3 |
| • Critical Thinking / Problem Solving / Decision Making | Highly Effective | 3 |
| • Diversity and Community | Highly Effective | 3 |
| • Personal skills used for developing employment relationships | Highly Effective | 3 |
| • Technology | Highly Effective | 3 |
| • Overall Performance | Highly Effective | 3 |
| **Professional Skills Score** | | **3.00** |

| Final Evaluations | Raw Score | Section Weight | Weighted Score |
|---|---|---|---|
| Average for Projects and Goals Score | 3.00 | 40% | 1.20 |
| Professional Development Score | 3.00 | 10% | 0.30 |
| Job Knowledge Score | 3.00 | 25% | 0.75 |
| Professional Skills Score | 3.00 | 25% | 0.75 |
| | | 100% | 3.00 |

| | |
|---|---|
| Quartile: | 3 |
| Evaluation Score (Out of 3): | 3.00 |
| Recommended Merit Increase %: | **2.50%** |

**Employee Comment:**  *Please update Project #3 on my list to completed. Thank you!*

## - End -