

## Annual Evaluation Guide

	Action	Notes
1.	Review the Self-Evaluations submitted by your staff	<ul style="list-style-type: none"> <li>• What were your major achievements in the past year?</li> <li>• What are the areas of your performance in which you believe you could improve? Please describe.</li> <li>• How would you assess your overall performance during this review period? Please describe.</li> <li>• What job challenges, if any, do you have or resources do you need in performing your job?</li> </ul>
2.	Review the Annual Evaluation online form before entering ratings and comments  <a href="#">ANNUAL PERFORMANCE REVIEW FORM</a>	<ul style="list-style-type: none"> <li>• Core Criteria</li> <li>• Examples</li> <li>• Ratings</li> </ul>
3.	Enter required information for each staff member's online evaluation	<ul style="list-style-type: none"> <li>• Employee Name, Employee email, &amp; Employee S0#</li> <li>• Your information - Supervisor Name, Supervisor email, &amp; Supervisor S0#</li> </ul>
4.	Review each Core Criteria Category	<ul style="list-style-type: none"> <li>• 7 Core Criteria Categories for Staff</li> <li>• 8 Core Criteria Categories for Management</li> </ul>
5.	Use the radial button to select a Performance Rating for each Core Criteria category  <ul style="list-style-type: none"> <li>• Exceeds Expectations</li> <li>• Achieves Expectations</li> <li>• Sometimes Achieves Expectations</li> <li>• Unsatisfactory</li> </ul>	<ul style="list-style-type: none"> <li>• In order to review the examples for each rating, select the radial button corresponding with the rating; and the examples will change to reflect that rating.</li> <li>• The examples given are general examples and may not be applicable to every position or department.</li> <li>• You may provide other examples or details in the comment box.</li> </ul>

6.	Add Comments	<ul style="list-style-type: none"> <li>• Comments are <b>required</b> for Unsatisfactory ratings.</li> <li>• Comments are encouraged for all ratings.</li> </ul>
7.	<p>Add comments (if applicable) for Significantly Exceeds Expectations. Comment box must be completed for extra merit consideration.</p> <p><b>*Note</b> - Significantly Exceeds Expectations make the employee eligible for extra merit consideration, but does not guarantee extra merit.</p>	<ul style="list-style-type: none"> <li>• Managers must select the “Exceeds Expectations” radial button.</li> <li>• The Significantly Exceeds Expectations box will display under the general comments box.</li> <li>• This comment box is <b>only</b> used for extra merit consideration.</li> <li>• General comments should be placed in the comments box.</li> </ul>
8.	Select Overall Performance Rating	<ul style="list-style-type: none"> <li>• Manager selects the overall rating based on the number of ratings in each category. <ul style="list-style-type: none"> <li>○ Exceeds Expectations (at least 3 of 7 ratings score at this level)</li> <li>○ Achieves Expectations (at least 4 of 7 score at this level)</li> <li>○ Sometimes Achieves Expectations (at least 3 of 7 score at this level)</li> <li>○ Unsatisfactory (if one or more score at this level)</li> </ul> </li> <li>• If scoring falls into two ratings, the manager will select the rating that most appropriately reflects performance.</li> </ul>
9.	Add Supervisory Comments	<ul style="list-style-type: none"> <li>• Manager is encouraged to provide comments to summarize the employees’ overall performance for the pro-rated year (July –December 2018).</li> <li>• Comments are <b>required</b> for an Overall Unsatisfactory Rating.</li> <li>• Comments are encouraged for all Ratings.</li> </ul>
10.	Save & Resume	<ul style="list-style-type: none"> <li>• The save button is located at the bottom/right corner of the form.</li> <li>• If you are working on the form and are unable to submit, please be sure to save the form and resume later.</li> <li>• Managers will have an option to copy the link, or they may enter their email address and the saved link will be emailed.</li> <li>• The sender will be “Southeast Missouri State University”.</li> </ul>

		<ul style="list-style-type: none"> <li>• The email subject will be “Annual Performance Review – Employee Name”.</li> <li>• In the body of the email, Managers may select the “resume now” button to complete the performance review form.</li> <li>• If someone follows their saved link and returns to their entry, they can pick up where they left off and complete their submission.</li> <li>• Managers should save the form prior to meeting with the employee, so they have the ability to make any edits prior to submitting.</li> </ul>
11.	Conduct Face to Face Meeting (By the 1 <sup>st</sup> week of February)	<ul style="list-style-type: none"> <li>• Managers meet individually with each staff member to review the form and discuss performance.</li> <li>• Manager will print a copy of the form to review with the staff member.</li> <li>• Manager and staff discuss goals for 2019.</li> <li>• Some goals may be pre-determined for the position or the department.</li> <li>• Other goals may be discussed and set as a result of the meeting.</li> </ul>
12.	Assign Goals	<ul style="list-style-type: none"> <li>• Managers will enter 2019 goals and how they will measure success.</li> <li>• Three (3) boxes are provided to detail goals and measurements.</li> <li>• Managers may add more boxes by selecting the “add” button below the goals.</li> </ul>
13.	Complete & Submit Annual Evaluation	<ul style="list-style-type: none"> <li>• When the review is finalized and goals are entered, the Manager will select the submit button.</li> <li>• An electronic copy will be emailed to the manager, with the Employee’s name in the subject line.</li> <li>• Print the finalized copy.</li> <li>• The employee will sign, manager will sign, and the employee will add any comments.</li> </ul>

14.	Send the form to the Reviewer (by the 1 <sup>st</sup> week in February)	<ul style="list-style-type: none"><li>• Both the signed paper Annual Evaluation and the Self-Evaluation are sent to the Reviewer.</li></ul>
15.	Reviewer sends final copies to Human Resources  (by February 22 <sup>nd</sup> )	<ul style="list-style-type: none"><li>• Reviewer received Annual Evaluation and attached Self-Evaluation for each staff member in their organization.</li><li>• Evaluation are reviewed, signed, and then forwarded to Human Resources.</li></ul>