

Completing the Performance Evaluation

Overview: Understanding the A&P Performance Evaluation Process

The performance evaluation process begins with completing the performance evaluation document by rating the employee in all applicable sections. After the document has been completed, the rater must save the document and plan a performance review discussion with the employee. If the supervisor wants to make the document available to the employee to review prior to the review discussion, then mark the document Share with Employee and notify the employee the document is available to be reviewed online. The employee may access the performance document via OMNI Self Service. Otherwise, the document should remain In Progress until after the review discussion is held.

After the review discussion is held with the employee, the supervisor must select the Share with Employee button (if this step has not already been completed) and then select Request Acknowledgement button to indicate that the evaluation has been discussed with the employee in person. After the Request Acknowledgement button has been selected by the supervisor, an automated email notification will be sent to the employee instructing them to review the performance evaluation, make any necessary comments and acknowledge the performance evaluation online via Self Service.

Once the employee has acknowledged the performance evaluation document and added any necessary comments, the supervisor must finalize the evaluation by navigating to the employee's performance document and marking it as Complete.


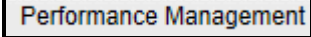
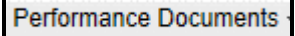
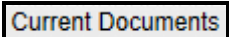
Please Note: The performance evaluation document will not be considered complete until it has been discussed with the employee, acknowledged by the employee and finalized by the rater. To review completed performance evaluations, see "View Historical Documents" training guide.

Procedure

Scenario:

In this topic, you will learn the steps to complete an employee's performance evaluation.





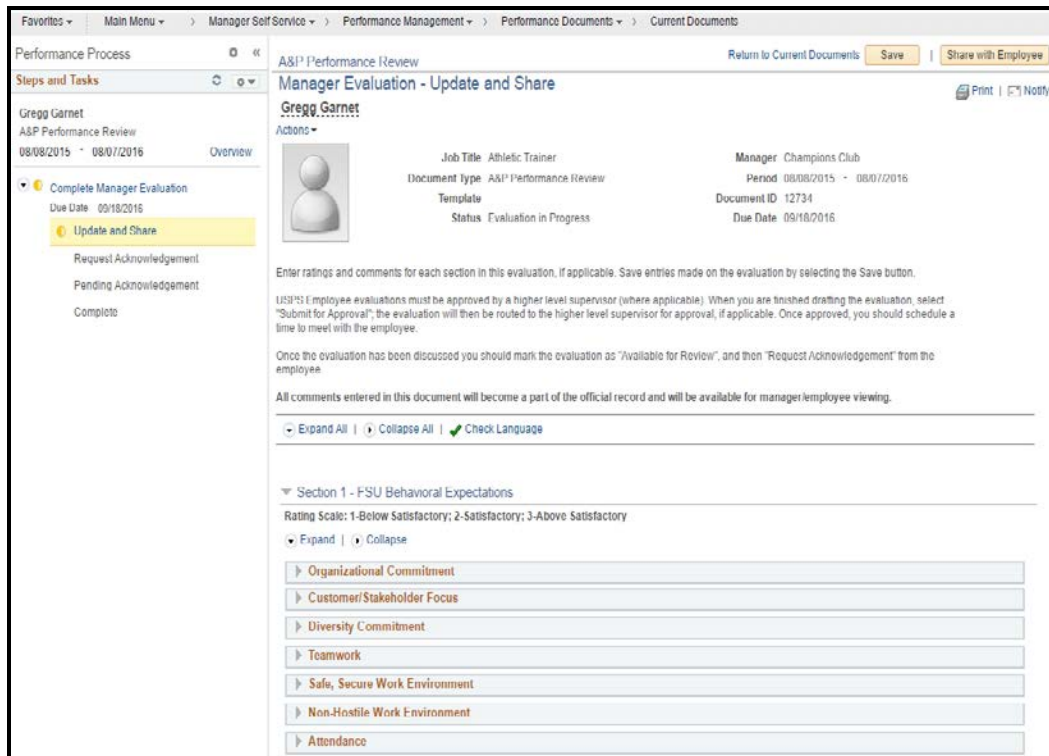
Step	Action
1.	Login to my FSU- my.fsu.edu
2.	Click the Human Resources link. 
3.	Click the Main Menu link.
4.	Click the Manager Self-Service link.
5.	Click the Performance Management link. 
6.	Click the Performance Documents link. 
7.	Click the Current Documents link. 
8.	Click the Employee Name link.

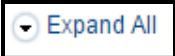
Current Performance Documents

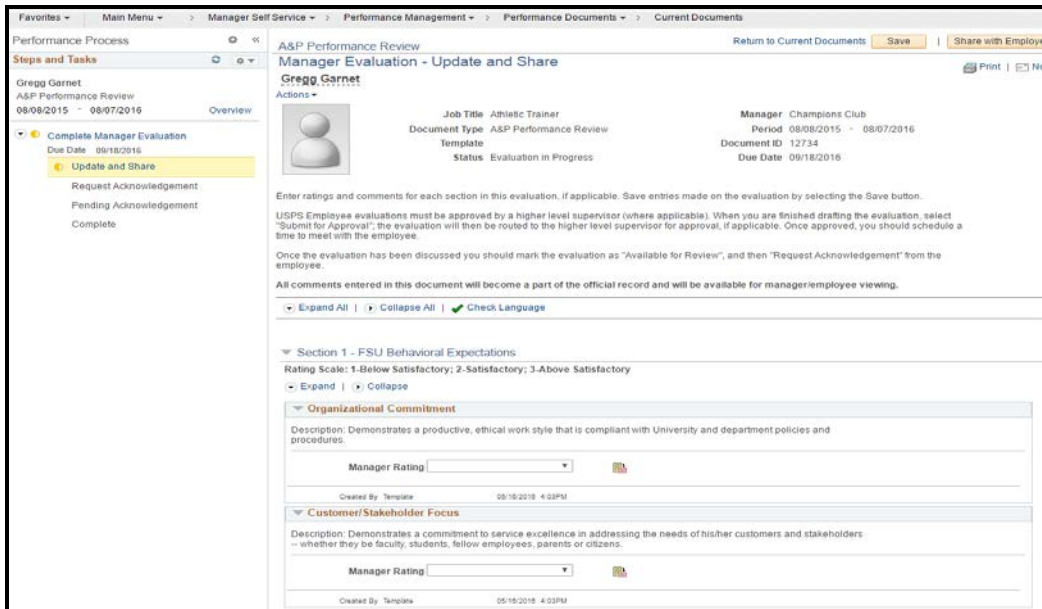
Listed are the current performance documents for which you are the Manager.



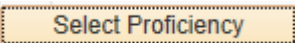
[Filter Criteria](#)

Performance Documents							Personalize	Find			First	1-5 of 5	Last
Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date							
Gregg Gamet	A&P Performance Review	Evaluation in Progress	08/08/2015	08/07/2016	Athletic Trainer	09/18/2016							
Gwendolyn Gold	A&P Performance Review	Evaluation in Progress	08/08/2015	08/07/2016	Athletic Trainer	09/18/2016							



Step	Action
9.	Expand all the sections by clicking the Expand All link. 



Step	Action
10.	Click the Rating Description icon to view a description of the applicable ratings for the FSU Behavioral Expectations Section. 
11.	Rate employee appropriately 
12.	Click the Select Proficiency button. 

Proficiencies

Rating	Description
<input type="radio"/> 1-Below Satisfactory	Employee does not demonstrate behavioral expectation.
<input type="radio"/> 2-Satisfactory	Employee demonstrates behavioral expectation.
<input type="radio"/> 3-Above Satisfactory	Employee demonstrates and exemplifies this expectation and serves as an example for others.


Select Proficiency



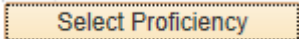
[Return](#)

Step	Action
13.	<p>Continue to rate the employee appropriately in all areas under FSU Behavioral Expectations and add comments at the end of the Section.</p> <p><i>Note: You can also select ratings by clicking the drop down rating box and selecting the appropriate rating.</i></p>

The screenshot shows a performance evaluation interface with two sections:

- Organizational Commitment:** Description: Demonstrates a productive, ethical work style that is compliant with University and department policies and procedures. Manager Rating: 2-Satisfactory. Created By: Template. Date: 11/25/2015 9:25AM.
- Customer/Stakeholder Focus:** Description: Demonstrates a commitment to service excellence in addressing the needs of his/her customers and stakeholders -- whether they be faculty, students, fellow employees, parents or citizens. Manager Rating: 2-Satisfactory.

Step	Action
14.	<p>Section 2: Responsibilities on the Position Profile represent the Essential and Marginal functions on the employee's position description.</p> <p>The Responsibilities section of performance evaluations are populated from corresponding data in the Position Profile. The description field will only display the first 254 characters of the Responsibility Description.</p> <p>If you find discrepancies in these sections, you may need to update your employee's position description.</p>
15.	<p>Continue to select appropriate ratings for the Responsibilities section.</p> <p>Click the Manager Rating drop down.</p> 
16.	<p>Add Comments at the end of the Responsibilities section. Comments are recommended, especially if an employee receives a rating of Below Satisfactory within a section.</p>

Step	Action
17.	<p>Section 3: Competencies on the Position Profile represent the Knowledge Skills and Abilities section of the Position Description.</p> <p>Remember the Competencies Section of the performance evaluation are populated from corresponding data in the Position Profile. The description field will only display the first 254 characters of a Competency Description.</p> <p>If you find discrepancies in these sections, you may need to update your employee's position description.</p>
18.	<p>Click the Rating Description icon to view a description of applicable ratings for the Competencies Section.</p> 
19.	<p>Rate the employee appropriately.</p> <p>The example below shows the employee's rating for Competency 1 as Proficient.</p> <p>Click the 2-Proficient option.</p> 
20.	<p>Click the Select Proficiency button.</p> 

Proficiencies

Rating	Description
<input type="radio"/> 0-None	Skill, ability or applicable knowledge not performed at the basic level for the competency.
<input type="radio"/> 1-Basic	Skill, ability, or applicable knowledge typically needed to be performed at fundamental and entry level for the competency.
<input checked="" type="radio"/> 2-Proficient	Skill, ability, or applicable knowledge typically needed to perform at a fully functional and experienced level for the competency.
<input type="radio"/> 3-Advanced	Skill, ability, or applicable knowledge typically needed to perform beyond a functional and experienced level; approaching or at expert level for the competency.
<input type="radio"/> 4-Not Applicable	Skill, ability or applicable knowledge no longer a required competency.

[Return](#)

Step	Action
21.	Continue to select appropriate ratings for the Competencies section and add comments under “Competencies Summary”.

▼ Section 3 - Competencies


Enter ratings and comments for each competency listed below, if applicable.
Rating Scale: 0-None; 1-Basic; 2-Proficient; 3-Advanced; 4-Not Applicable

▼ Expand | ► Collapse

▼ **Competency 1: Effective Communication**

Description: Ability to communicate effectively verbally and in writing.

- Target Rating: 3-Advanced


Manager Rating 

Created By Profile 05/16/2016 4:03PM


▼ **Competency 2: Policy Development**

Description: Ability to develop and implement policies, procedures, goals, and objectives.

- Target Rating: 3-Advanced

Manager Rating 

Created By Profile 05/16/2016 4:03PM

Step	Action
22.	Section 4: The Employee Goals section is pre-populated from Business Objectives and Career Goals identified for the employee in the Team Profile section of Manager Self-Service. For more information, review the "Adding/Updating Business and Career Goals and Objectives" Training Guide.
23.	NOTE: If Business Objectives and Career Goals were set up prior to the loading of the performance evaluation, please evaluate as follows: When evaluating an employee under the Employee Goals section, the rater must use the manager rating box to select a status.
24.	Click the Pencil Icon . 

A&P Performance Review Return to Current Documents Save | Share with Employee

Manager Evaluation - Update and Share Print | Notify

▼ Section 4 - GOALS (Optional)

Rating Scale: 0-Below Satisfactory; 1-Satisfactory; 2-Above Satisfactory; 3-Exemplary; 4-Not Applicable

Expand | Collapse

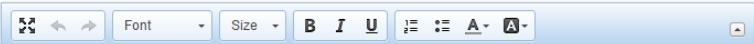
Goal 1: Create Sports Medicine Brochure

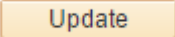
Description: Create brochure for student athletes that encourages safe exercise and hydration. Brochure should include photos, and available resources.

Measurement : Brochure is to be printed and ready for distribution to student athletes at the beginning of the fall semester 2016.

- Due Date : 06/30/2016
- Status:
- Percent Complete: 0

Manager Rating

Manager Comments 

Step	Action
25.	Select the appropriate Status . For the purpose of this example, rate the Status of Goal 1 as Complete . Click the Complete list item.
26.	Enter the appropriate Percent Complete .
27.	Click the Update button. 

A&P Performance Review

Edit Goal

Title Create Sports Medicine Brochure

Description Create brochure for student athletes that encourages safe exercise and hydration. Brochure should include photos, and available resources.


Measurement Brochure is to be printed and ready for distribution to student athletes at the beginning of the fall semester 2016.

Status Complete

Percent Complete 100

Due Date 06/30/2016 (example 12/31/2000)

[Return](#)

Step	Action
28.	<p>Click on the Manager Rating icon to rate the Goals Section.</p> <p>Manager Rating <input type="text" value="v"/></p> <p>You may click the Rating Description icon to view a description of applicable ratings for the Employee Goals Section.</p> 

A&P Performance Review Return to Current Documents Save | Share with Employee

Manager Evaluation - Update and Share Print | Notify

▼ Section 4 - GOALS (Optional)

Rating Scale: 0-Below Satisfactory; 1-Satisfactory; 2-Above Satisfactory; 3-Exemplary; 4-Not Applicable

Expand | Collapse

▼ Goal 1: Create Sports Medicine Brochure


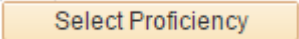
Description: Create brochure for student athletes that encourages safe exercise and hydration. Brochure should include photos, and available resources.

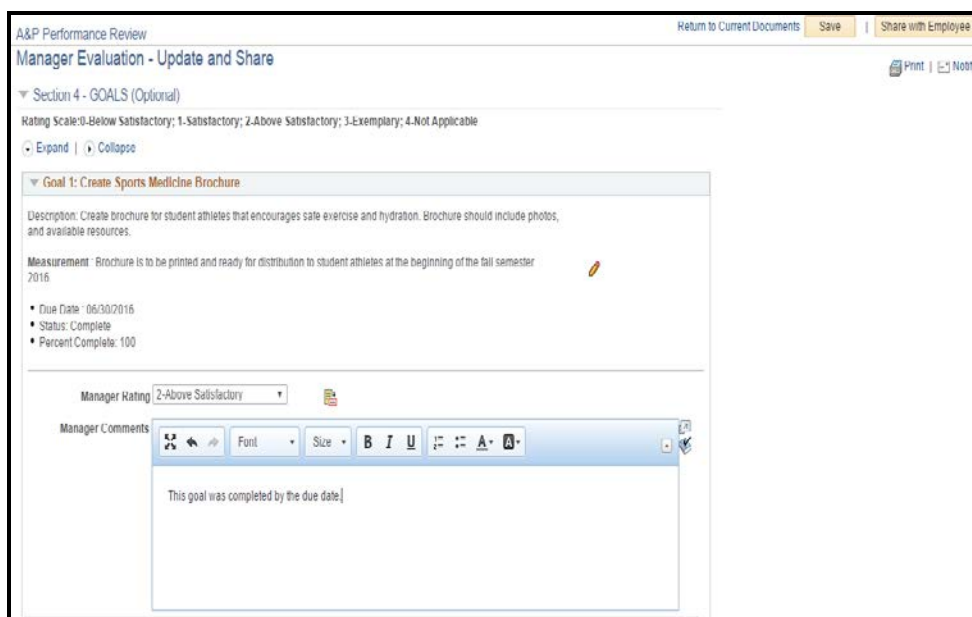
Measurement : Brochure is to be printed and ready for distribution to student athletes at the beginning of the fall semester 2016.



- Due Date : 06/30/2016
- Status: Complete
- Percent Complete: 100


Manager Rating 2-Above Satisfactory

Manager Comments

Step	Action
29.	Rate the employee's Business Objective appropriately. 
30.	Click the Select Proficiency button. 
31.	Continue to complete the ratings for all remaining Business Objectives and Career Goals, selecting an appropriate Status , Percent Complete , and entering Comments for each.




Step	Action
32.	Section 5: Click the Rating Description icon to view a description of applicable Overall Summary ratings. 
33.	Rate the employee's Overall Summary appropriately. 

Step	Action
34.	Click the Select Proficiency button. 

Proficiencies

Rating	Description
<input type="radio"/> 1-Below Satisfactory	Employee performance level fails to meet adequate expectations and requirements for the position. Sustained improvement needed.
<input type="radio"/> 2-Satisfactory	Employee performance level meets adequate expectations and requirements for the position but not approaching higher levels of performance. Working towards an above satisfactory rating.
<input checked="" type="radio"/> 3-Above Satisfactory	Employee performance level is higher than adequate expectations and requirements for the position, and approaching the highest levels of performance. Working towards an exemplary rating.
<input type="radio"/> 4-Exemplary	Employee performance level exceeds expectations, surpasses requirements, and is at the highest level of performance. Work serves as an example for others.

[Return](#)

Step	Action
35.	<p>Add Comments at the end of the Overall Summary section. Comments are recommended, especially if an employee receives a rating of Below Satisfactory within a section.</p> <p>For an Overall Below Satisfactory rating, you must contact Employee and Labor Relations in the Office of Human Resources prior to issuing the evaluation.</p> <p>Enter Comments appropriately.</p>
36.	<p>Click the Check Language button located near the top of the page to check the performance evaluation document for inappropriate language used to describe the employee's performance in the Comments sections.</p> <p></p>

All comments entered in this document will become a part of the official record and will be available for manager/employee viewing.

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Step	Action
37.	<p>If the language is used in an appropriate context, select the Ignore button.</p> <p>If inappropriate language is found, review the Language Suggestions table for suggestions.</p> <p>Select the Change button to edit the text.</p>

Manager Evaluation

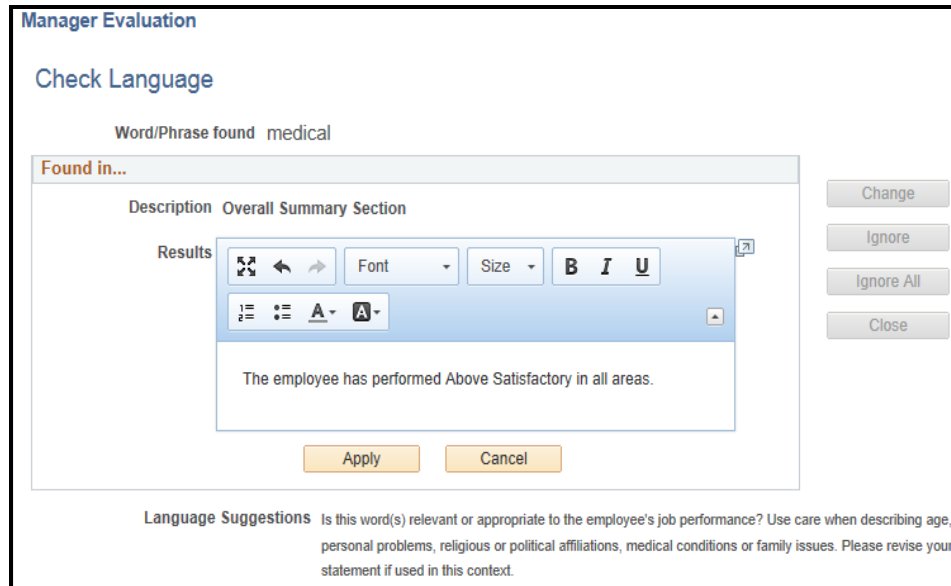
Check Language

Word/Phrase found: medical

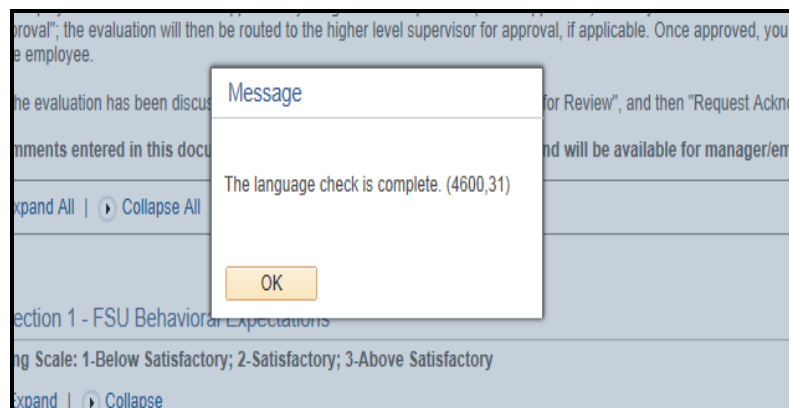
Found in...	Description	Results	Action
Overall Summary Section		The employee has performed Above Satisfactory in all areas, despite her recent medical leave of absence.	<input type="button" value="Change"/> <input type="button" value="Ignore"/> <input type="button" value="Ignore All"/> <input type="button" value="Close"/>

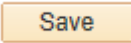
Language Suggestions Is this word(s) relevant or appropriate to the employee's job performance? Use care when describing age, personal problems, religious or political affiliations, medical conditions or family issues. Please revise your statement if used in this context.


Step	Action
38.	<p>Edit the language or phrase to remove the inappropriate reference.</p> <p>For questions on appropriate language content, please contact Employee and Labor Relations in the Office of Human Resources.</p>
39.	Click the Apply button.



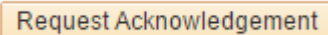
Step	Action
40.	Click the OK button after all language change suggestions have been reviewed and Changed/Ignored.
41.	Review the document to ensure that all language changes processed correctly.




Step	Action
42.	Click the Save button. 
43.	STOP! You have completed the first steps in completing the performance evaluation process.
44.	What's next? <i>Schedule and conduct a performance review discussion with your employee.</i>

Step	Action
45.	<i>Please note: As an option, you can make the document available to the employee to review prior to the review discussion, by marking the document Share with Employee, then Confirm. Otherwise, the document should remain In Progress until after the review discussion is held.</i>
46.	You may create or print a PDF copy of the evaluation for a higher review if necessary by selecting the printer icon. 
47.	Close the Print Page Tab to return to the document.
48.	After you have held your performance review discussion meeting with your employee, return to the employee's performance evaluation in OMNI. Navigation to Current Performance Documents: myFSU > HR > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents
49.	Click the Employee Name link.

Current Performance Documents						
Listed are the current performance documents for which you are the Manager.						
Filter Criteria						
Performance Documents				Personalize	Find	First 1-5 of 5 Last
Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Gregg Garnet	A&P Performance Review	Evaluation in Progress	08/08/2015	08/07/2016	Athletic Trainer	09/18/2016
Gwendolyn Gold	A&P Performance Review	Evaluation in Progress	08/08/2015	08/07/2016	Athletic Trainer	09/18/2016

Step	Action
50.	Click Share with Employee , if you have not already clicked the link.
NOTE:	The Document details screen will show you the status of the document and the Next Action. To make the evaluation document available for the employee to review and acknowledge online via Self-Service, click the Request Acknowledgement link.
51.	Click Request Acknowledgement button. 



Step	Action
52.	Click the Confirm button. 
53.	Note: You must confirm that the performance evaluation review meeting has been held by completing the Next Action, Request Acknowledgement . You will receive a confirmation page.

Step	Action
54.	NOTE: STOP!! DO NOT mark the Acknowledge button, unless the employee has refused to acknowledge their evaluation. <i>An automated email notification will now be sent to the employee instructing them to review the performance evaluation, make any necessary comments, and acknowledge the performance evaluation online via Self-Service.</i> <i>For instructions on how to complete the Employee Actions, see training guide, "Employee Actions: Acknowledging the Performance Evaluation"</i>
55.	You will receive a system generated email once the employee has acknowledged the A&P Performance Review form. A web link will be provided in the text. Click on the link and it will take you directly to the performance review document (IF you are not currently logged in to OMNI you will be prompted to log in). Navigation to Current Performance Documents: myFSU > HR > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents
56.	Click the Employee Name link.


Navigation: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Current Performance Documents

Listed are the current performance documents for which you are the Manager.

Filter Criteria

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Gwendolyn Gold	A&P Performance Review	Evaluation in Progress	08/08/2015	08/07/2016	Athletic Trainer	09/18/2016
Ralph Renegade	A&P Performance Review	Evaluation in Progress	08/08/2015	08/07/2016	Athletic Trainer	09/18/2016
Gregg Garnet	A&P Performance Review	Evaluation in Progress	08/08/2015	08/07/2016	Athletic Trainer	09/18/2016
Susie Seminole	A&P Performance Review	Acknowledged	08/09/2015	08/07/2016	Athletic Trainer	09/18/2016

Step	Action
57.	<p>The final step in the performance evaluation process is to finalize the document. Click the Complete button.</p> <p></p>

Navigation: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Performance Process: A&P Performance Review

Steps and Tasks: Manager Evaluation - Complete

Susie Seminole

Job Title: Athletic Trainer
 Document Type: A&P Performance Review
 Template: A&P Performance Review
 Status: Acknowledged

Manager: Champions Club
 Period: 08/09/2015 - 08/07/2016
 Document ID: 12738
 Due Date: 09/18/2016

The status of this evaluation is Acknowledged.
 If you are ready to finalize this document, click the Complete button.

All comments entered in this document will become a part of the official record and will be available for manager/employee viewing.

Buttons: Complete, Update and Share, Request Acknowledgement, Pending Acknowledgement, Expand All, Collapse All

The current performance evaluation process is now complete. The document is now viewable as a historical document to both the Employee and Supervisor. **Navigation to Performance Historical Documents:** myFSU >HR 9.1 > Main Menu > Self Service or Manager Self Service > Performance Management > Performance Documents > Historical Documents

The REOPEN Button

If you select to **REOPEN** the evaluation, the document will be returned to “In Progress” status. This option may be used if changes must be made to the performance evaluation

document after the supervisor marked the document as **Share with Employee or Request Acknowledgement**. The document may not be reopened after the document has been marked **COMPLETE** by the supervisor.

For more information on the ePerformance process, contact Employee and Labor Relations in the Office of Human Resources.