

Employee Performance Evaluation Process

The employee performance evaluation process that opens in April is performed in myHR. The employee completes parts 1 and 3, and the manager completes part 2.

Employees and managers may find it useful to review past employee performance appraisals prior to beginning the process. Instructions appear in the Appendix of this document.

Part 1: Employee Self-Evaluation

When the review process opens in April, the first step for the employee is to perform the steps for self-evaluation. Email notifications to the responsible party will be generated throughout the process as each step is completed.

- 1) Log into myhr.umsystem.edu.
- 2) On the **myHR: Employee Self Service** homepage, click the **Performance** tile.

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 Part 1: Employee Self-Evaluation 1

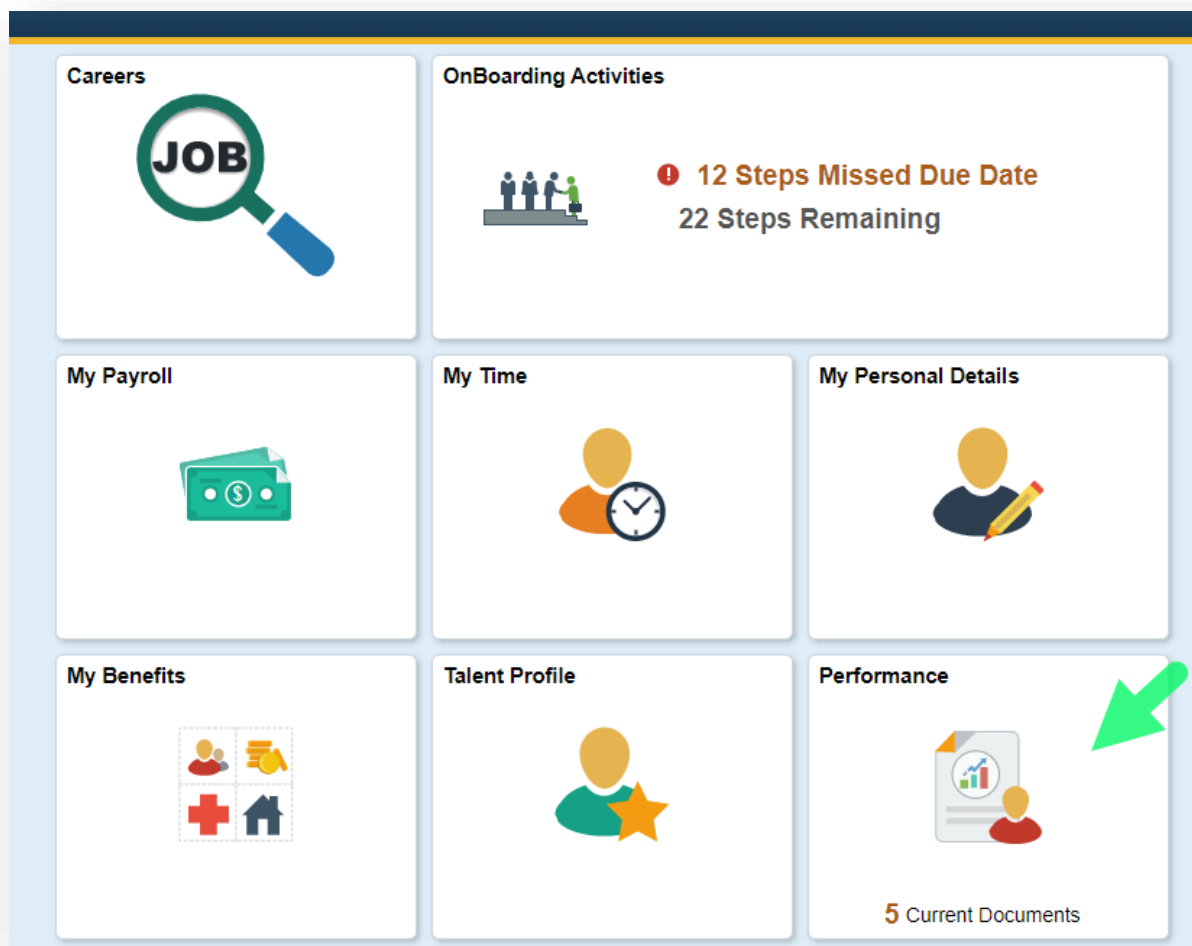
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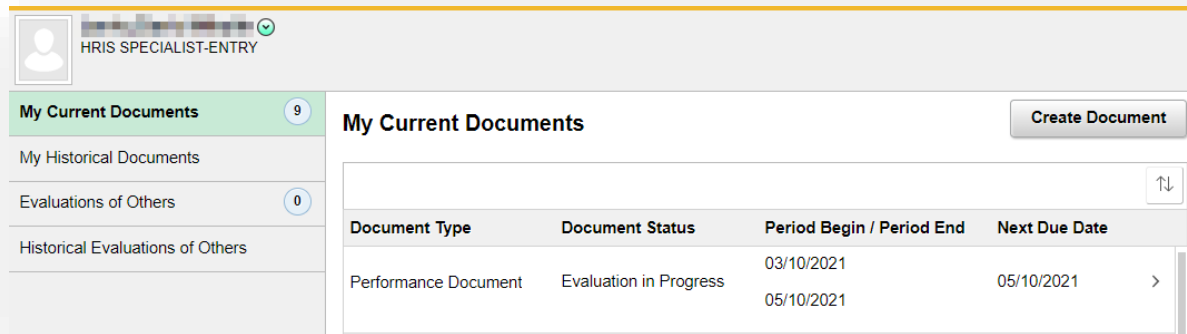
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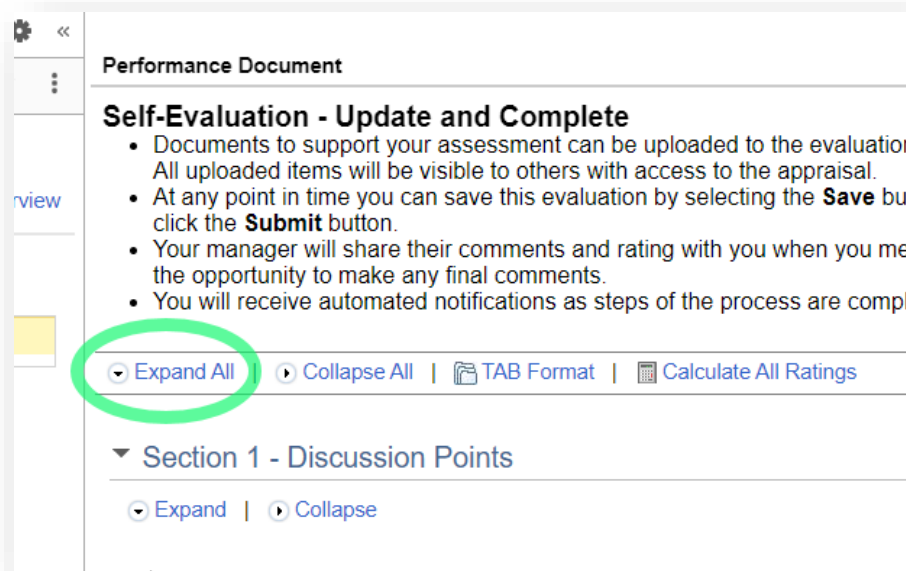
- The **Performance** page opens with the **My Current Documents** section open in the main pane. Click the **Performance Document** row to start the self-evaluation.



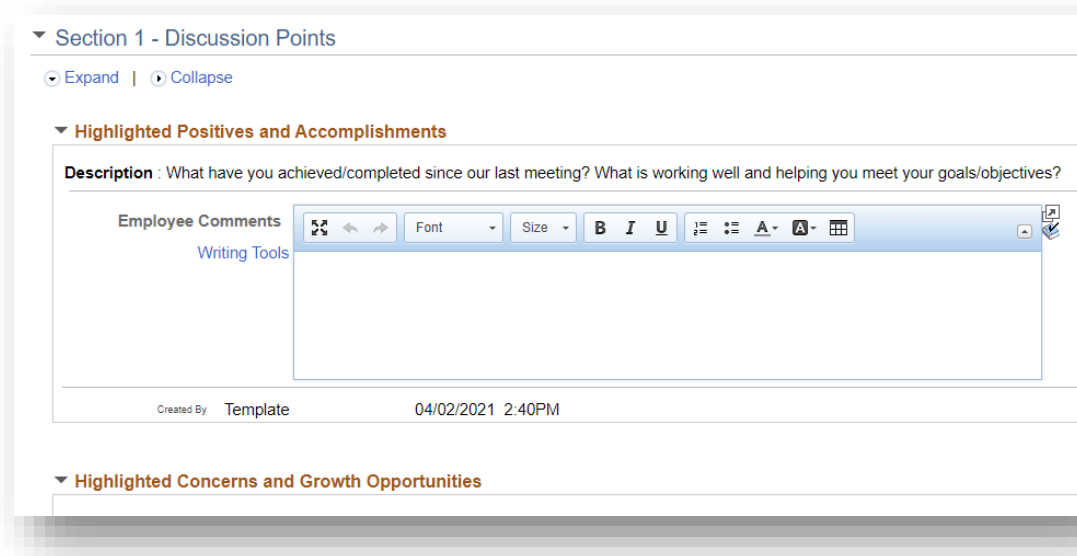
- The **Self-Evaluation** page opens to the **Update and Complete** task. Review the instructions in the **Employee Data** section before proceeding to the next step.



- 5) At the bottom of the instructional information, click the **Expand All** link to expand all sections.



- 6) In **Section 1 – Discussion Points**, perform the following steps.



- a) **Highlighted Positives and Accomplishments** - Read the questions and add your comments in the text box.

“What have you achieved/completed since our last meeting? What is working well and helping you meet your goals/objectives?”

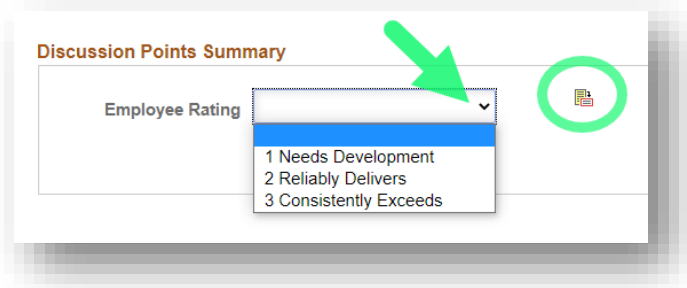
- b) **Highlighted Concerns and Growth Opportunities** - Read the questions and add your comments in the text box.

“Have you experienced any challenges in meeting your goals? Do you have concerns or developmental opportunities? Are there any changes to these goals that we should be considering?”

- c) **Next Steps** – Read the questions and add your comments in the text box.

“What are your next steps? What assistance do you need to accomplish the steps?”

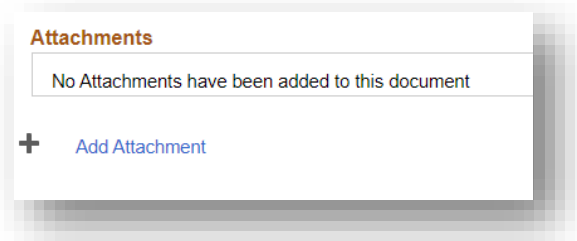
- 7) In **Discussion Points Summary**, expand the **Employee Rating** field and select the appropriate rating.



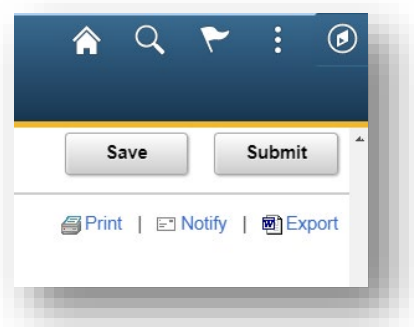
You may click the icon to the right of the field to view employee rating options descriptions:

- 1 Needs Development** – Does not consistently meet all expectations. Additional direction and support is required/needed.
- 2 Reliably Delivers** – Consistently meets expectations. Might exceed some expectations. Requires little to no additional direction to achieve established responsibilities.
- 3 Consistently Exceeds** – Consistently exceeds or delivers beyond expectations. Influences others to perform better.

- 8) You may add documents to support your comments in the **Attachments** section.

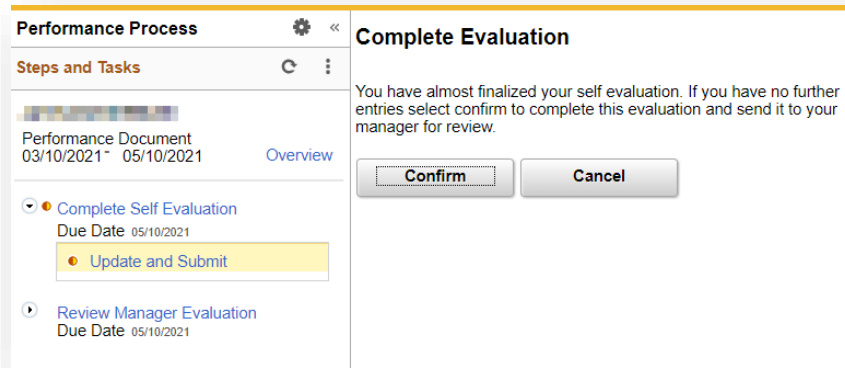


- 9) When you've finished adding discussion points and selecting a rating, click the **Submit** button in the upper right corner to complete the process.



If you need more time to complete the self-evaluation, you may click the **Save** button to save your responses and return later to finish.

- 10) The last step in submitting your self-evaluation is to click the **Confirm** button on the **Complete Evaluation** page that appears after clicking the Submit button.



- 11) The **Confirmation – Document Completed** message appears, confirming that you have completed this part of the process. The next step will be performed by your manager, and then you will return to finish [Part 3: Employee Acknowledgement](#).

Part 2: Manager Evaluation

Manager evaluations are to be completed after the employee self-evaluation is submitted. Email notifications to the responsible party will be generated throughout the process as each step is completed.

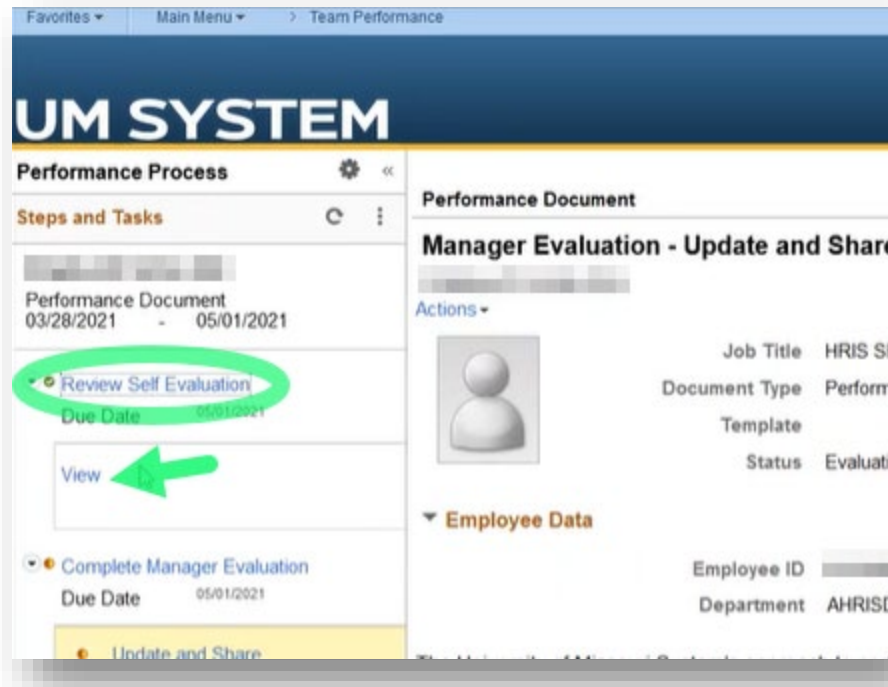
1. Log in to hrprd.umsystem.edu
2. Select **Manager Self Service** in the home page drop-down menu, and then select the **Team Performance** tile.



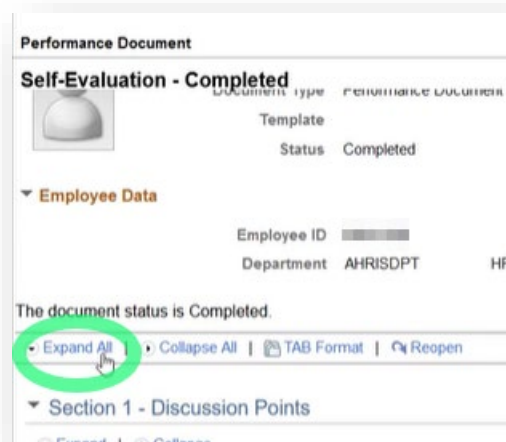
3. The **Current Documents** page opens. Click the row of an employee whose **Document Status** displays **Evaluation in Progress**.

| Name / Job Title | Document Type | Document Status | Period Begin / End |
|------------------|----------------------|------------------------|--------------------------|
| [Redacted] | Performance Document | Evaluation in Progress | 03/28/2021 05/01/2021 |
| [Redacted] | Performance Document | Evaluation in Progress | 03/26/2021 05/26/2021 |
| [Redacted] | Performance Document | Evaluation in Progress | 03/12/2021 05/14/2021 |
| [Redacted] | Performance Document | Evaluation in Progress | 03/11/2021 05/14/2021 |

- The **Manager Evaluation – Update and Share** page opens.
Click to expand the **Review Self Evaluation** link in the **Steps and Tasks** pane on the left and click the **View** link.



- On the employee's **Self-Evaluation – Completed** page, scroll down, and select the **Expand All** link to view the employee's discussion responses.



- 6. Review the employee’s discussion points and summary rating.

The screenshot displays a 'Performance Document' interface. At the top, it is titled 'Performance Document' and 'Self-Evaluation - Completed'. Below this, there is a 'Description' field with the text: 'Have you experienced any challenges in meeting your goals? Do you have concerns or developmental opportunities? Are there any changes to these goals that we should be considering?'. This is followed by an 'Employee Comments' text area. Below the text area, it shows 'Created By: Template' and '03/29/2021 3:01PM', and 'Last Modified By: [redacted]' and '03/30/2021 1:45PM'. A similar structure is repeated for the 'Next Steps' section, with a description: 'What are your next steps? What assistance do you need to accomplish the steps?'. At the bottom of the document, there is a 'Discussion Points Summary' section showing 'Employee Rating 2 Reliably Delivers'.

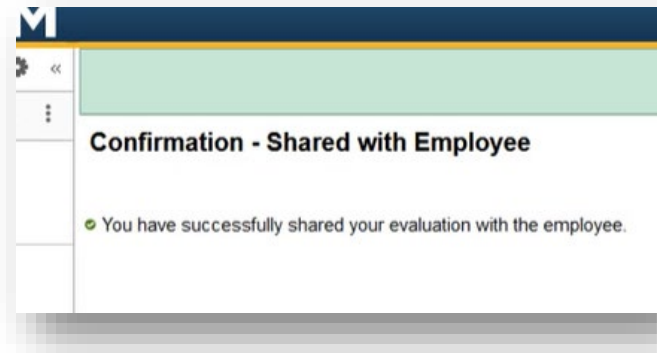
- 7. If you determine that more information is needed from the employee, click the **Reopen** link above Section 1 – Discussion Points. The employee will receive an email requesting further information.

This screenshot shows a document toolbar with the text 'The document status is Completed.' at the top. The toolbar includes buttons for 'Expand All', 'Collapse All', 'TAB Format', and 'Reopen'. The 'Reopen' button is circled in green, and a mouse cursor is hovering over it. Below the toolbar, the document content is visible, showing a section titled 'Section 1 - Discussion Points' with sub-sections for 'Expand | Collapse' and 'Highlighted Positives and Accomplishments'.

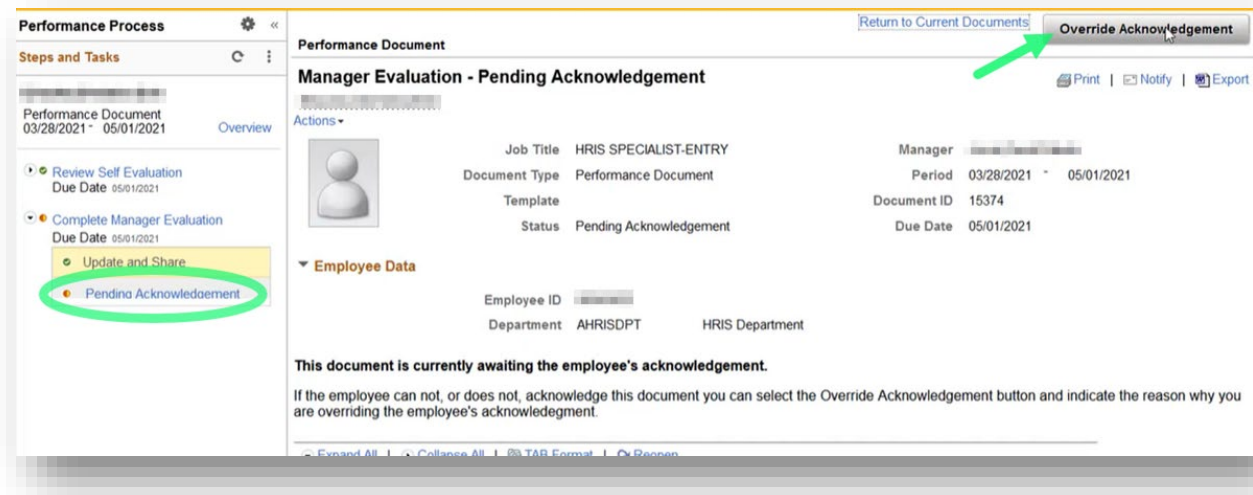
8. If no further information is needed from the employee, complete the following steps on the **Manager Evaluation – Update and Share** page.

- Add comments to the same three discussion points that the employee answered and select an employee rating in the Discussion Points Summary section.
 - Provide additional comments in **Section 2 – Overall Summary**.
 - Click the **Share with Employee** button. (Alternatively, you may select the Save button if you're not finished and return to the evaluation later to complete it.)
9. The **Share with Employee** page instructs you to next meet with the employee to discuss the evaluation. Click the **Confirm** button to complete the process.

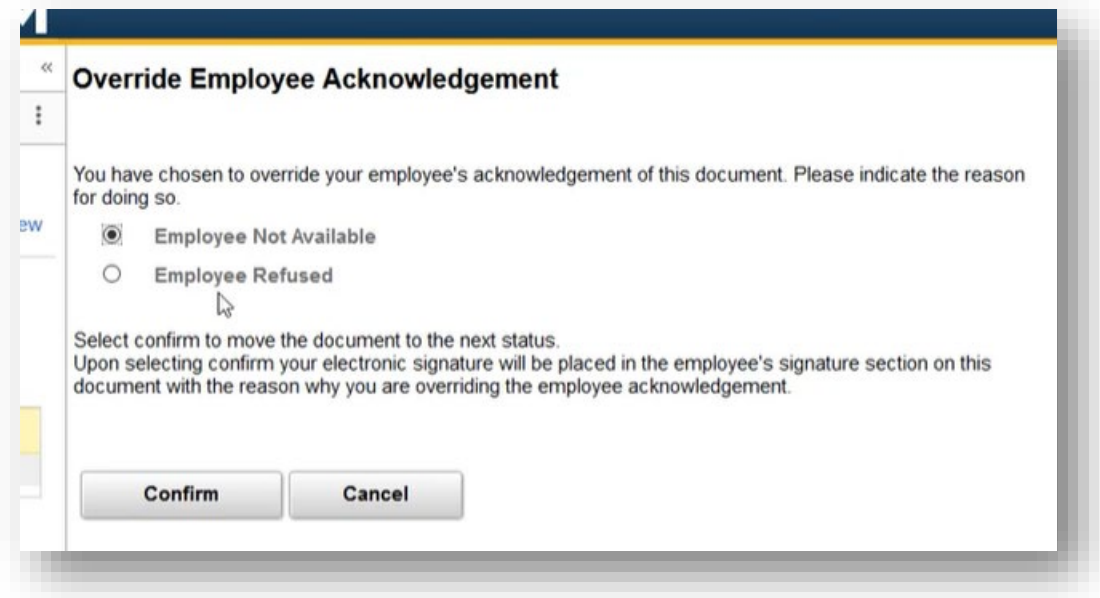
10. The **Confirmation – Shared with Employee** page confirms that you have successfully shared the evaluation with the employee.



11. The next steps are performed by the employee after you've met with them. If there is an impediment to this part of the process, click the **Pending Acknowledgement** link in the Steps and Tasks pane, and then click the **Override Acknowledgement** button in the upper right corner.



12. Select the reason that you are overriding your employee's acknowledgement of the document and then click the **Confirm** button.



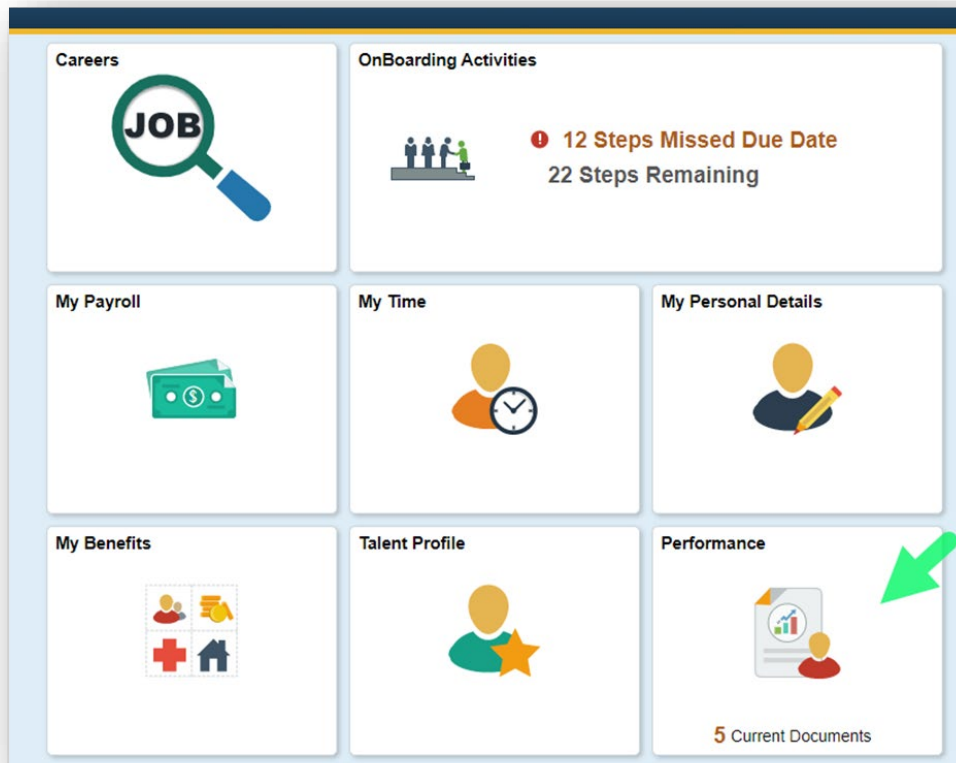
The screenshot shows a dialog box titled "Override Employee Acknowledgement". The dialog has a dark blue header bar with a back arrow icon on the left. Below the header, there is a vertical menu icon (three dots) and a "PW" label. The main content area contains the following text: "You have chosen to override your employee's acknowledgement of this document. Please indicate the reason for doing so." Below this text are two radio button options: "Employee Not Available" (which is selected) and "Employee Refused". A mouse cursor is pointing at the "Employee Refused" option. Below the radio buttons, there is a paragraph of text: "Select confirm to move the document to the next status. Upon selecting confirm your electronic signature will be placed in the employee's signature section on this document with the reason why you are overriding the employee acknowledgement." At the bottom of the dialog, there are two buttons: "Confirm" and "Cancel".

13. The manager's part of the process is complete.

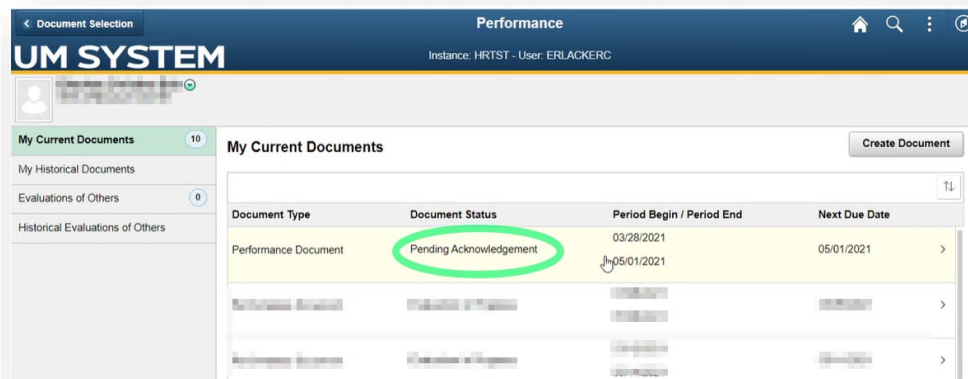
Part 3: Employee Acknowledgement

This step is performed by the employee after the manager has performed the procedure in Step 2 and the employee and manager have met to discuss the performance evaluation.

- 1) Log into myhr.umsystem.edu.
- 2) On the **myHR: Employee Self Service** homepage, click the **Performance** tile.



- 3) The **Performance** page opens with the **My Current Documents** section open in the main pane. Note that the Performance Document's status displays **Pending Acknowledgement**. Click the row to perform the final steps in the evaluation process.



- 4) The **Manager Evaluation – Acknowledge** page opens. Click the **Expand All** link and review your manager's comments.

Performance Document Save Acknowledge

Manager Evaluation - Acknowledge Print Notify Export

Select the **Acknowledge** button to confirm that you have discussed this document with your manager. Acknowledging does not necessarily indicate agreement with the appraisal, but does acknowledge that you have received and reviewed this information. Your name will be placed in the signature section on the printed document acknowledging that the review was held.

Expand All Collapse All TAB Format

Section 1 - Discussion Points Expand Collapse

Highlighted Positives and Accomplishments

Description: What have you achieved/completed since our last meeting? What is working well and helping you meet your goals/objectives?

Manager Comments

| | | |
|------------------|----------|-------------------|
| Created By | Template | 03/29/2021 3:01PM |
| Last Modified By | | 03/30/2021 1:48PM |

Highlighted Concerns and Growth Opportunities

Description: Have you experienced any challenges in meeting your goals? Do you have concerns or developmental opportunities? Are there any changes to these goals that we should be considering?

Manager Comments

- 5) In **Section 3 – Employee Comments**, add comments if desired and then click the **Acknowledge** button.

Performance Document Save Acknowledge

Manager Evaluation - Acknowledge Print Notify Export

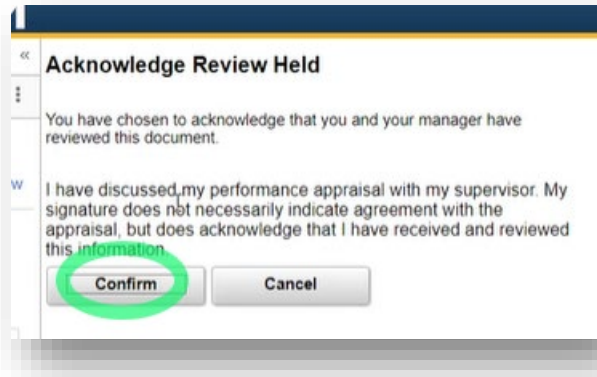
Section 3 - Employee Comments

The Employee Comments section is enabled once the evaluation has been shared with the employee. This section is used to denote conversations or feedback after the evaluation has been approved.

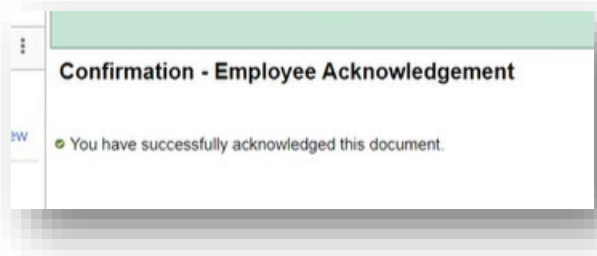
Employee Comments

Font Size B I U

- 6) On the **Acknowledge Review Held** page, click the **Confirm** button to acknowledge that you have met with your manager to discuss your performance evaluation.



- 7) The **Confirmation – Employee Acknowledgement** page appears, confirming that the process is complete.



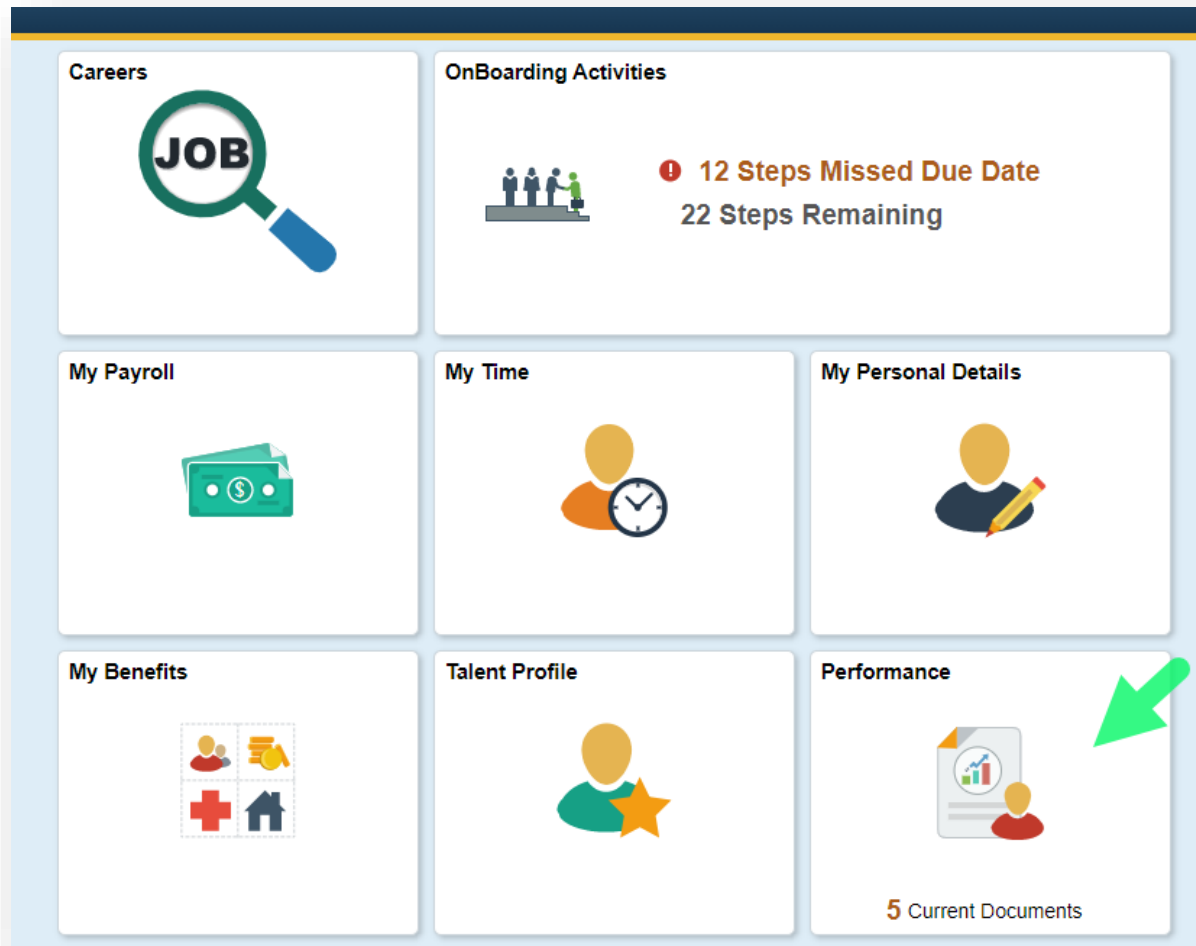
End of procedure

Appendix

Employee: Accessing Archived Appraisals

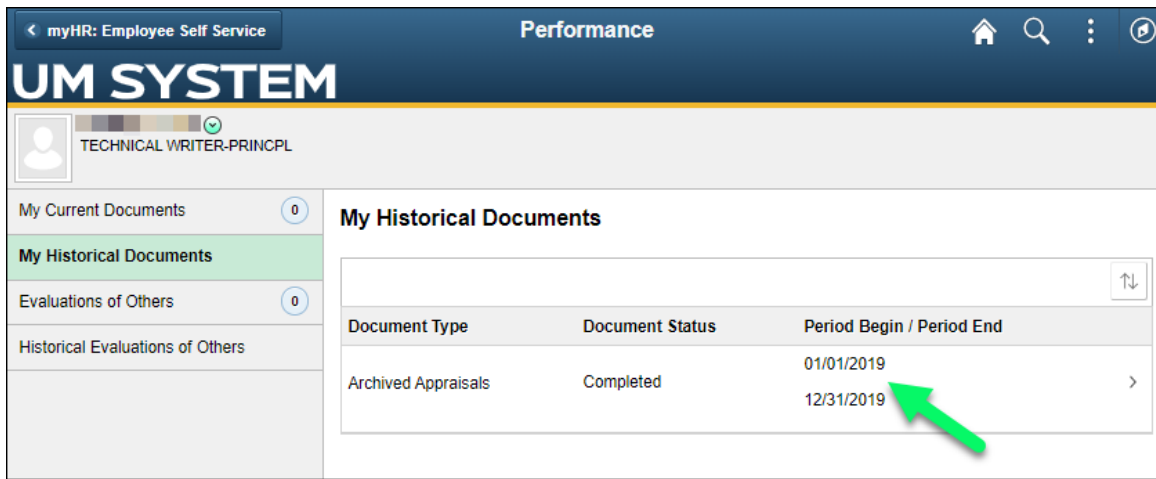
The following steps demonstrate how employees can access archived appraisals through **Performance** and the **My Historical Documents** page.

- 1) Log into myHR and click the **Performance** tile.

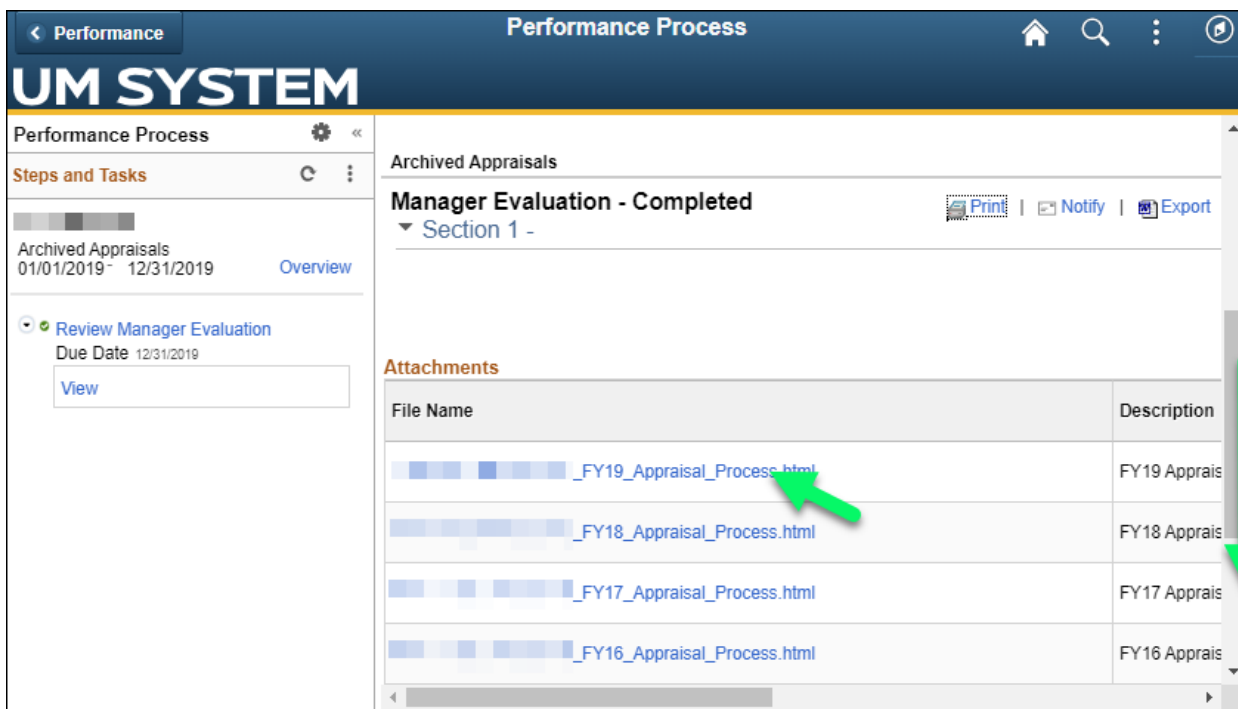


- 2) On the **My Historical Documents** page, Archived Appraisals through 2019 are compiled together; performance evaluations thereafter will be listed individually on this page.

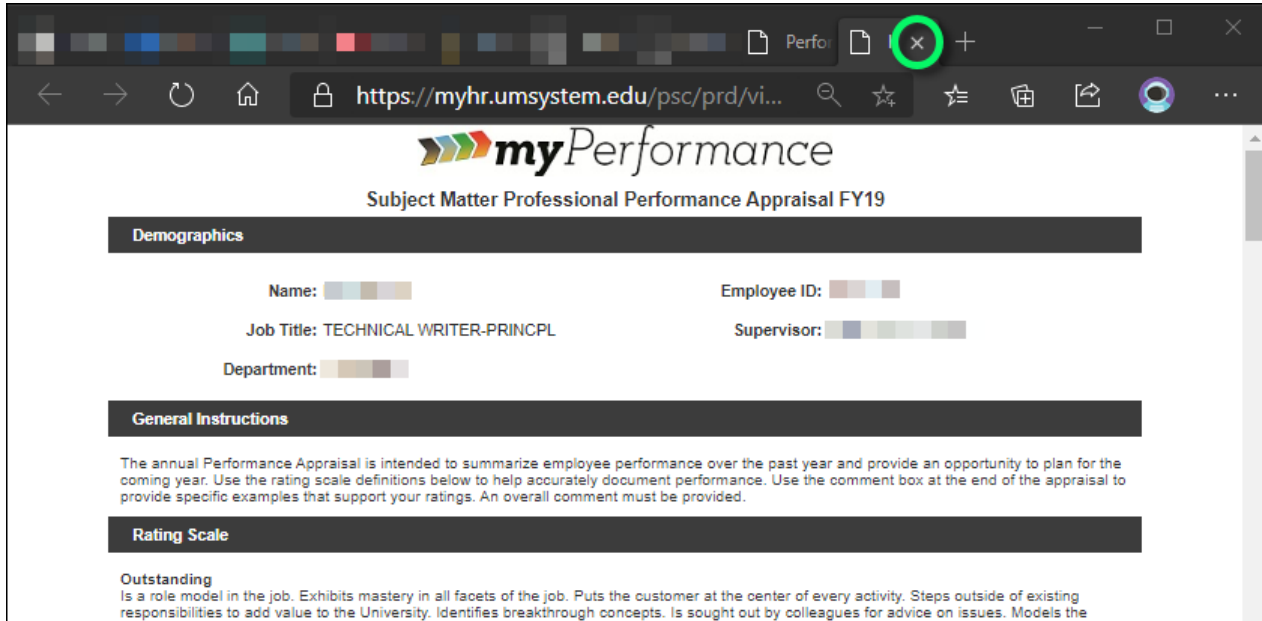
Click the row with the Period Begin and End dates that you wish to access.



3) Scroll down the **Archived Appraisals** page and expand **Section 1** if necessary. Prior FY appraisals are listed under the **Attachments** section. Click the link of the appraisal you want to view.



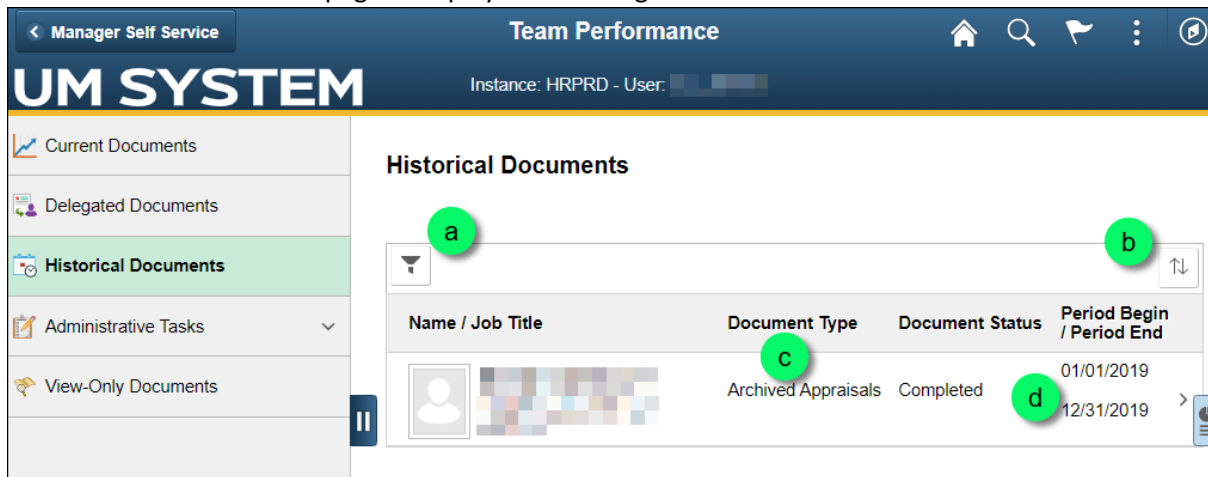
4) The selected appraisal opens in a new tab.



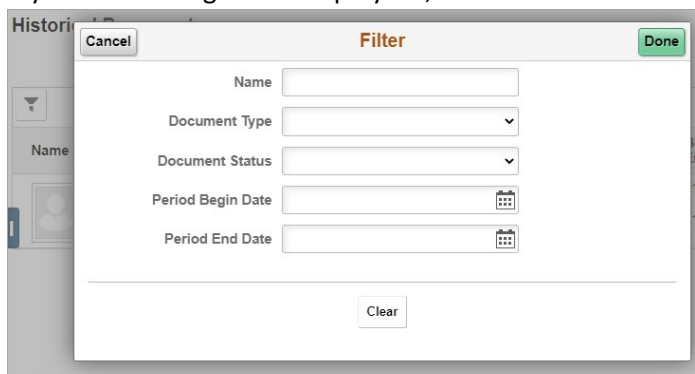
5) Close the tab to return to the Archived Appraisals page where you can select another appraisal.

Manager: Accessing Archived Appraisals

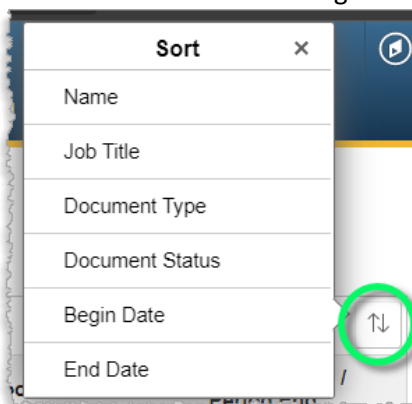
1. Access **Team Performance**, as described in [Part 2: Manager Evaluation](#), and click the **Historical Documents** option in the left menu panel.
2. The **Historical Documents** page is displayed on the right.



- a. If you have a long list of employees, use the **Filter** feature to narrow your results.



- b. Click the **Sort** button to change the way the results are sorted.

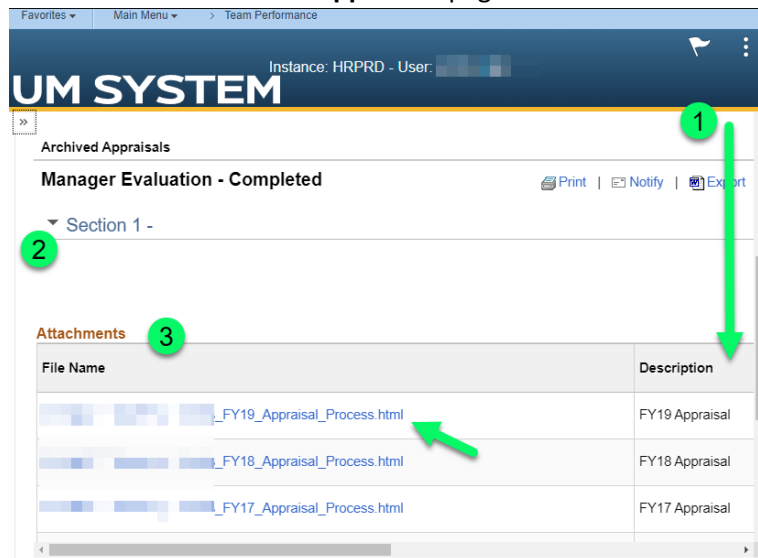


- c. Past appraisals are labeled *Archived Appraisals* under **Document Type**.
- d. Refer to the **Period Begin / Period End** dates to locate the appraisal(s) that you want to view.

◀ All appraisals prior to FY2020 are listed on one page, with a Period Begin / Period End date of 01/01/2019 – 12/31/2019. Click the row to access the appraisals.

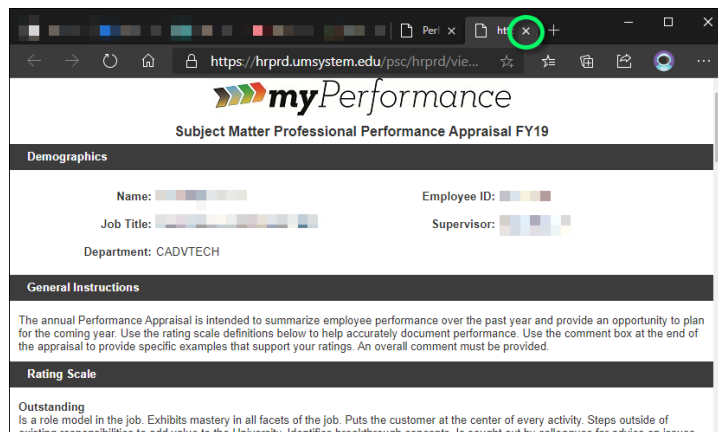
| Document Status | Period Begin / Period End |
|-----------------|---------------------------|
| Completed | 01/01/2019 |
| | 12/31/2019 |

1. Scroll down the **Archived Appraisals** page.



2. Appraisals are listed in the **Attachments** section.
3. Click the link of the appraisal you wish to view.

The appraisal for the FY you selected opens in a new tab. Close the tab when you're finished.



▶ Appraisals performed after FY2019 will be listed on the Historical Documents page individually.