












Select the Performance Module

ORACLE Employee Self Service

Time 	Payroll & Compensation 	My Personal Info 
Benefits Summary 	Performance  Next Due Date 04/06/2018	Total Rewards  [No Title] FY17 Total Rewards
Training 	Miscellaneous 	Approvals  3
TRAM Workcenter 	My Campus Account 	

The Performance module automatically opens up to your "Current Documents"

Select the displayed box; this will open your current ePerformance document so that you can complete your Self Evaluation.

Document Type	Document Status	Period Begin / Period End	Next Due Date
Performance Document	Evaluation in Progress	01/01/2018 12/31/2018	02/05/2019 >

In the Steps and Tasks pane, you can see where your document is at in the process and what steps and tasks are still needed.

The document automatically opens up to the phase it's currently in.

Performance Document

Self-Evaluation - Update and Complete

Daisy Duck

Job Title: Admnstr, Business, Asst
 Document Type: Performance Document
 Template: UH Staff Performance
 Status: Evaluation in Progress

Manager: Angelica Pickles
 Period: 01/01/2018 - 12/31/2018
 Document ID: 38622
 Due Date: 12/01/2018

Employee Data

Employee ID: 0086140
 Department: H0155 Business Services
 Years of Service: 21 Years 3 Months
 Years in Job: 1 Years 7 Months
[Rating History](#)

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals | Responsibilities | Competencies | Overall

Section 1 - Employee Goals

You'll need to go through each of the sections below to assign a rating and enter comments on the individual items.
Please note that Sections 3 and 4 are both located on the Competencies Tab

<u>TAB</u>	<u>Section To Be Completed</u>
GOALS	Section 1 - Employee Goals
RESPONSIBILITIES	Section 2 - Responsibilities
COMPETENCIES	Section 3 - Competencies
COMPETENCIES	Section 4 - Customer Service

Performance Process
Performance Document
Save | Complete


Steps and Tasks

Daisy Duck
Performance Document
01/01/2018 - 12/31/2018 [Overview](#)

- Establish Performance Criteria
Due Date 04/06/2018
- Complete Self Evaluation
Due Date 12/01/2018
- Update and Complete
- Review Manager Evaluation
Due Date 02/05/2019

Self-Evaluation - Update and Complete

Daisy Duck



Job Title Admnstr, Business, Asst
Document Type Performance Document
Template UH Staff Performance
Status Evaluation in Progress

Manager Angelica Pickles
Period 01/01/2018 - 12/31/2018
Document ID 38622
Due Date 12/01/2018

Employee Data

Employee ID 0086140
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[Rating History](#)

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals
Responsibilities
Competencies
Overall

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Select the Goals Tab
The items will be condensed, click "Expand" to expand all items

Performance Document

Self-Evaluation - Update and Complete

Goals | Responsibilities | Competencies | Overall

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand | Collapse

Goal 1: GOAL 1

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating: 0.00

Employee Comments

Writing Tools

Created By: Daisy Duck 06/11/2018 2:38PM

Goal 2: GOAL 2

Description : Manager adds SMART goal here.

Employee Measurement : Manager can include how they'll be measuring the employee on the SMART goal they've established.

Employee Rating: 0.00

Employee Comments

Writing Tools

Created By: Angelica Pickles 06/11/2018 2:52PM

Click the drop down arrow to assign a rating for this individual goal.

- 1 - Needs Improvement
- 2 - Generally Meets Expectations
- 3 - Achieved Expectations
- 4 - Exceeds Expectations
- 5 - Outstanding Performance

*See Rating Definitions on Last Page of Manual.

Enter your comments (if any) for this individual goal in the Employee Comments box.

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

Goals | Responsibilities | Competencies | Overall

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand | Collapse

Goal 1: GOAL 1

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating: 0.00

Employee Comments: 1-Needs Improvement, 2-Generally Meets Expectations, 3-Achieved Expectations, 4-Exceeds Expectations, 5-Outstanding Performance

Writing Tools: Size, B, I, U, A, A

I met this SMART goal by completing the goal by the established deadline.

Created By: Daisy Duck 06/11/2018 2:38PM

Once you're done with this goal rating and employee comment, continue these same steps for each remaining item (Goal 2, Goal 3, etc..).

Once you've finished rating each Goal, select the Calculator icon in the Goals Summary section.
This will calculate the ratings assigned for each Goal and display the "Goals Summary Employee Rating".

Performance Document

Self-Evaluation - Update and Complete

Goal 2: GOAL 2

Description : Manager adds SMART goal here.

Employee Measurement : Manager can include how they'll be measuring the employee on the SMART goal they've established.

Employee Rating: 4-Exceeds Expectations 4.00

Employee Comments: I exceeded this SMART goal by completing the goal before the established deadline.

Created By: Angelica Pickles 06/11/2018 2:52PM

Goals Summary

Summary Weight: 20 % (not less than 10%)

Employee Rating: 0.00

Employee Comments:

Audit History



Created By: Krista McElroy 06/11/2018 1:41:50PM

Last Modified By: Angelica Pickles 06/11/2018 3:05:15PM


You can also include additional overall comments for your Goals section as a whole.

Goals Summary

Summary Weight 20 % (not less than 10%)

Employee Rating 3-Achieved Expectations 3.50  

Employee Comments



Employee can enter additional comments regarding the goals that were set for them if they'd like.

Audit History

Created By	Krista McElroy	06/11/2018 1:41:50PM
Last Modified By	Angelica Pickles	06/11/2018 3:05:15PM

Below is an example of the Goals Section with all Ratings and Comments entered.

Performance Document

Self-Evaluation - Update and Complete

Goal 1: GOAL 1

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

I met this SMART goal by completing the goal by the established deadline.

Created By Daisy Duck 06/11/2018 2:38PM

Goal 2: GOAL 2

Description : Manager adds SMART goal here.

Employee Measurement : Manager can include how they'll be measuring the employee on the SMART goal they've established.

Employee Rating 4-Exceeds Expectations 4.00

Employee Comments

Writing Tools

I exceeded this SMART goal by completing the goal before the established deadline.

Created By Angelica Pickles 06/11/2018 2:52PM

Goals Summary

Summary Weight 20 % (not less than 10%)

Employee Rating 3-Achieved Expectations 3.50

Employee Comments

Once you've finished with the GOALS section select "SAVE" in the top right hand corner of your document.
Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document

Self-Evaluation - Update and Complete

Daisy Duck

Job Title Admnstr, Business, Asst
Document Type Performance Document
Template UH Staff Performance
Status Evaluation in Progress

Manager Angelica Pickles
Period 01/01/2018 - 12/31/2018
Document ID 38622
Due Date 12/01/2018

Employee Data

Employee ID 0086140
Department H0155 Business Services
Years of Service 21 Years 3 Months
Years in Job 1 Years 7 Months

Rating History

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals | Responsibilities | Competencies | Overall

Section 1 - Employee Goals

Enter ratings and comments for each goal listed below, if applicable.

Expand | Collapse

Goal 1: GOAL 1

Description : Employee adds SMART goal here.

Employee Measurement : Employee can include how they'll be measured on the SMART goal they've established.

Employee Rating 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

I met this SMART goal by completing the goal by the established deadline.

Now that you've evaluated all of your Goals, you're ready to complete Section 2 - Responsibilities.

Select the "Responsibilities" Tab.

The items will be condensed, click "Expand" to expand all items

Performance Document

Self-Evaluation - Update and Complete

Daisy Duck

Job Title Admnstr, Business, Asst
Document Type Performance Document
Template UH Staff Performance
Status Evaluation in Progress

Manager Angelica Pickles
Period 01/01/2018 - 12/31/2018
Document ID 38622
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Years in Job 1 Years 7 Months
[Rating History](#)

✓ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals **Responsibilities** Competencies Overall

Section 2 - Responsibilities

Enter ratings and comments for each responsibility listed below, if applicable.

Expand Collapse

- Responsibility 1: Business Administration- Duty
- Responsibility 2: Business Administration- Duty
- Responsibility 3: Business Administration- Duty
- Responsibility 4: Admnstr, Business, Asst- Summary

Responsibilities Summary

Summary Weight 40 % (not less than 40%)
Employee Rating 0.00
Employee Comments
Writing Tools

Repeat the same process as you did in Section 1 - Goals.

Enter a Rating for each Responsibility.

Enter a comment (if needed) in each Responsibilities "Employee Comment" section.

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

Section 2 - Responsibilities

Enter ratings and comments for each responsibility listed below, if applicable.

Expand | Collapse

Responsibility 1: Business Administration- Duty

Description : Trains and provides guidance to departmental staff regarding the use of university forms and the application of university and college policies and procedures.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Responsibility rating.

Created By Profile 06/11/2018 1:41PM

Responsibility 2: Business Administration- Duty

Description : Assists department staff with personnel issues and maintains personnel files.

Employee Rating: 4-Exceeds Expectations 4.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Responsibility rating.

Created By Profile 06/11/2018 1:41PM

Responsibility 3: Business Administration- Duty

Description : Provides financial accountability and ensures compliance with State and university guidelines by functioning as certifying signature authority.

Once you've entered Ratings and/or Comments for each individual Responsibility, select "Collapse".

The individual Responsibilities will condense.

Select the Calculator icon in the Responsibilities Summary section.

This will calculate the ratings assigned for each Responsibility and display the "Responsibilities Summary Employee Rating".

The screenshot shows the Oracle HR Self-Evaluation interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Worklist', 'HR92SBX - Home', and 'Sign out'. Below this is the Oracle logo and a notification area. The main content area is titled 'Performance Document' and 'Self-Evaluation - Update and Complete'. It includes a 'Save' and 'Complete' button, and options for 'Print', 'Notify', and 'Export'. The 'Employee Data' section shows details for Employee ID 0086140, Department H0155, Business Services, 21 Years of Service, 3 Months, 1 Year in Job, and 7 Months. A success message states 'You have successfully saved your evaluation.' Below this is a section for 'Section 2 - Responsibilities' with instructions to enter ratings and comments. A red box highlights the 'Collapse' button in the 'Expand/Collapse' dropdown. Below the responsibilities list, the 'Responsibilities Summary' section is highlighted with a red box. It shows a 'Summary Weight' of 40% (not less than 40%), an 'Employee Rating' of 0.00, and a 'Writing Tools' toolbar. The 'Collapse' button and the 'Employee Rating' field are also highlighted with red boxes. At the bottom, there is an 'Audit History' section and a footer with 'Created By: Kristi McElroy' and '06/11/2018 1:41:50PM'.

You can also include additional overall comments for your Responsibilities section as a whole.

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

Employee Data

Employee ID	0086140		
Department	H0155	Business Services	
Years of Service	21 Years	3 Months	
Years in Job	1 Years	7 Months	

[Rating History](#)

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Long Format](#) | [Calculate All Ratings](#)

Goals | **Responsibilities** | Competencies | Overall

Section 2 - Responsibilities



Enter ratings and comments for each responsibility listed below, if applicable.


[Expand](#) | [Collapse](#)

- ▶ Responsibility 1: Business Administration- Duty
- ▶ Responsibility 2: Business Administration- Duty
- ▶ Responsibility 3: Business Administration- Duty
- ▶ Responsibility 4: Admnstr, Business, Asst- Summary

Responsibilities Summary

Summary Weight 40 % (not less than 40%)

Employee Rating 3-Achieved Expectations 3.50  

Employee Comments 

Employee can enter a comment here for the overall Responsibility Summary Rating.

Audit History

Once you've finished with the RESPONSIBILITIES section select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document Save Complete

Self-Evaluation - Update and Complete

Print | Notify | Export

Employee Data

Employee ID 0086140
Department H0155 Business Services
Years of Service 21 Years 3 Months
Years in Job 1 Year 7 Months
[Rating History](#)

You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals **Responsibilities** Competencies Overall

Section 2 - Responsibilities

Enter ratings and comments for each responsibility listed below, if applicable.

Expand | Collapse

Responsibility 1: Business Administration- Duty

Responsibilities Summary

Summary Weight 40 % (not less than 40%)
Employee Rating 3-Achieved Expectations 3.50

Employee Comments

Writing Tools

Employee can enter a comment here for the overall Responsibility Summary Rating.

Now that you've evaluated all of your Responsibilities, you're ready to complete Section 3 Competencies and Section 4 Customer Service. Both of these Sections are located on the "Competencies" Tab.

Select the "Competencies" Tab.

The items will be condensed, click "Expand" in each Section (Competencies / Customer Service) to expand all items.

The screenshot displays the Oracle HR Self-Evaluation interface. At the top, there is a navigation bar with "Favorites", "Main Menu", "Worklist", "HR92SBX - Home", and "Sign out". Below this is the Oracle logo and a notification area. The main content area is titled "Performance Document" and "Self-Evaluation - Update and Complete". It includes a success message: "You have successfully saved your evaluation." and instructions: "Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager." There are buttons for "Save" and "Complete". Below the instructions are tabs for "Goals", "Responsibilities", "Competencies", and "Overall". The "Competencies" tab is selected and highlighted with a red box. Underneath, there is a section titled "Section 3 - Competencies" with a red box around the title and an "Expand" button also highlighted with a red box. This section contains two competency items: "Competency 1: Knowledge and Skills" and "Competency 2: Planning & Organizing". Below these is a "Competencies Summary" box showing a "Summary Weight" of 20% (not less than 10%) and an "Employee Rating" of 0.00. There is a text area for "Employee Comments" with a rich text editor toolbar. Below the competency section is "Section 4 - Customer Service" with a red box around the title and an "Expand" button also highlighted with a red box. This section contains two items: "Responsiveness" and "Knowledge of Work". Below these is a "Customer Service Summary" box showing a "Summary Weight" of 20% (not less than 10%) and an "Employee Rating" of 0.00. There is a text area for "Employee Comments" with a rich text editor toolbar.

Repeat the same process as you did in Section 1 - Goals and Section 2 - Responsibilities.

SECTION 3 - COMPETENCIES

Enter a Rating for each Competency item.

Enter a comment (if needed) in each Competencies "Employee Comment" section.

Performance Document | Self-Evaluation - Update and Complete | Save | Complete | Print | Notify | Export

Goals | Responsibilities | **Competencies** | Overall

Section 3 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Expand | Collapse

Competency 1: Knowledge and Skills

Description : Having achieved a satisfactory level of technical and professional skill or knowledge in position-related areas; keeping up with current developments and trends in areas of expertise.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments: [Writing Tools: Bold, Italic, Underline, Bulleted List, Numbered List, Text Color, Background Color]

Employee can enter a comment here for this Competency rating.

Created By: Angelica Pickles 06/11/2018 2:56PM

Competency 2: Planning & Organizing

Description : Establishing courses of action for self and others to ensure that work is completed efficiently.

Employee Rating: 4-Exceeds Expectations 4.00

Employee Comments: [Writing Tools: Bold, Italic, Underline, Bulleted List, Numbered List, Text Color, Background Color]

Employee can enter a comment here for this Competency rating.

Created By: Angelica Pickles 06/11/2018 2:56PM

Competencies Summary

Summary Weight	20 %	(not less than 10%)
----------------	------	---------------------

Once you've entered Ratings and/or Comments for each individual Competency, select "Collapse".

The individual Competencies will condense.

Select the Calculator icon in the Competencies Summary section.

This will calculate the ratings assigned for each Competency and display the "Competencies Summary Employee Rating".

Performance Document Save | Complete

Self-Evaluation - Update and Complete

Print | Notify | Export

Employee ID 0086140
Department H0155 Business Services
Years of Service 21 Years 3 Months
Years in Job 1 Years 7 Months
[Rating History](#)

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Long Format](#) | [Calculate All Ratings](#)

Goals | Responsibilities | **Competencies** | Overall

▼ Section 3 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.


Expand | **Collapse**

▶ Competency 1: Knowledge and Skills

▶ Competency 2: Planning & Organizing

Competencies Summary

Summary Weight 20 % (not less than 10%)

Employee Rating 3-Achieved Expectations 3.50 

Employee Comments

Writing Tools

Employee can enter a comment here for the overall Competencies Summary Rating.

SECTION 4 - CUSTOMER SERVICE

Enter a Rating for each Customer Service item.

Enter a comment (if needed) in each Customer Service "Employee Comment" section.

Performance Document
Self-Evaluation - Update and Complete

Section 4 - Customer Service

Responsiveness

Description : Responsiveness - the ability to build and maintain customer satisfaction through providing timely responses to inquiries, assignments and other deliverables.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Customer Service Rating.

Created By: Angelica Pickles 06/11/2018 2:57PM

Knowledge of Work

Description : Knowledge of work - the individual is well versed in his/her own expertise as the position requires them to be.

Employee Rating: 3-Achieved Expectations 3.00

Employee Comments

Writing Tools

Employee can enter a comment here for this Customer Service Rating.

Created By: Angelica Pickles 06/11/2018 2:57PM

Customer Service Summary

Summary Weight	20 %	(not less than 10%)
Employee Rating	0.00	

Once you've entered Ratings and/or Comments for each individual Customer Service item, select "Collapse".

The individual Customer Service items will condense.

Select the Calculator icon in the Customer Service Summary section.

This will calculate the ratings assigned for each Customer Service item and display the "Customer Service Summary Employee Rating".

The screenshot displays the Oracle HR92SBX Self-Evaluation interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Worklist', 'HR92SBX - Home', and 'Sign out'. Below this is the Oracle logo and a 'Notification' icon. The main content area is titled 'Performance Document' and 'Self-Evaluation - Update and Complete'. It includes a 'Save' button and a 'Complete' button. A message states: 'You have successfully saved your evaluation.' Below this, instructions read: 'Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.' The interface has tabs for 'Goals', 'Responsibilities', 'Competencies', and 'Overall'. Under 'Section 3 - Competencies', there are two competency items: 'Competency 1: Knowledge and Skills' and 'Competency 2: Planning & Organizing'. Below these is a 'Competencies Summary' section with a 'Summary Weight' of 20% (not less than 10%) and an 'Employee Rating' of 0.00. A 'Writing Tools' bar is visible above a text area. 'Section 4 - Customer Service' is highlighted with a red box. It contains 'Responsiveness' and 'Knowledge of Work' items. Below these is a 'Customer Service Summary' section with a 'Summary Weight' of 20% (not less than 10%) and an 'Employee Rating' of 3.00, which is also highlighted with a red box. A 'Writing Tools' bar is visible above a text area containing the comment: 'Employee can enter a comment here for the overall Customer Service Summary Rating|', which is also highlighted with a red box.


Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document **Save** Complete

Self-Evaluation - Update and Complete Print | Notify | Export

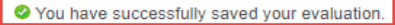
Daisy Duck

	Job Title Admnstr, Business, Asst	Manager Angelica Pickles
	Document Type Performance Document	Period 01/01/2018 - 12/31/2018
	Template UH Staff Performance	Document ID 38622
	Status Evaluation in Progress	Due Date 12/01/2018

Employee Data

Employee ID	0086140
Department	H0155 Business Services
Years of Service	21 Years 3 Months
Years in Job	1 Years 7 Months

[Rating History](#)

 You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Long Format](#) | [Calculate All Ratings](#)

Goals | Responsibilities | **Competencies** | Overall

Section 3 - Competencies



Enter ratings and comments for each competency and behavior listed below, if applicable.

[Expand](#) | [Collapse](#)

Competency 1: Knowledge and Skills

Competency 2: Planning & Organizing

Competencies Summary

Summary Weight	20 %	(not less than 10%)
Employee Rating	3-Achieved Expectations	3.50  

Employee Comments

Writing Tools

Employee can enter a comment here for the overall Competencies Summary Rating.

You've now evaluated all of your Goals, Responsibilities, Competencies and Customer Service items.

Now select the "Overall" Tab.

This is where your Overall Performance Review Rating will be.


Click the "Calculate All Ratings" blue icon to calculate your Overall Employee Rating.

You can also include additional overall comments for your overall Performance Review.

Performance Document Save | Complete

Self-Evaluation - Update and Complete Print | Notify | Export

Daisy Duck

	Job Title Admnstr, Business, Asst	Manager Angelica Pickles
	Document Type Performance Document	Period 01/01/2018 - 12/31/2018
	Template UH Staff Performance	Document ID 38622
	Status Evaluation in Progress	Due Date 12/01/2018

Employee Data

Employee ID	0096140
Department	H0155 Business Services
Years of Service	21 Years 3 Months
Years in Job	1 Years 7 Months

[Rating History](#)

✔ You have successfully saved your evaluation.

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format Calculate All Ratings

Goals | Responsibilities | Competencies | **Overall**

Section 5 - Overall Summary

Employee Rating 3-Achieved Expectations 3.40

Employee Comments

Employee can enter a comment here

Audit History

Created By	Krista McElroy	06/11/2018 1:41:50PM
Last Modified By	Angelica Pickles	06/11/2018 3:18:34PM

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation."

Performance Document

Self-Evaluation - Update and Complete

Daisy Duck

Job Title Admnstr, Business, Asst
Document Type Performance Document
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Status Evaluation in Progress

Manager Angelica Pickles
Period 01/01/2018 - 12/31/2018
Document ID 38622
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Employee Data

Employee ID 0086140
Department H0155 Business Services
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Rating History

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Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

Goals | Responsibilities | Competencies | Overall

BEFORE FINALIZING YOUR SELF EVALUATION, ENSURE YOU'VE ENTERED RATINGS FOR EACH ITEM IN EACH SECTION.

<u>TAB</u>	<u>Section</u>
GOALS	Section 1 - Employee Goals
RESPONSIBILITIES	Section 2 - Responsibilities
COMPETENCIES	Section 3 - Competencies
COMPETENCIES	Section 4 - Customer Service

Now that you've completed your Self Evaluation and verified all items had ratings, you're ready to finalize your Self Evaluation.

Select "Complete" in the top right hand corner of your document next to Save.

Once you select Complete, you'll be re-directed to a confirmation page.

Worklist | HR92SBX - Home | Sign out

Notification | NavBar

Performance Document | Save | Complete

Self-Evaluation - Update and Complete

Print | Notify | Export

Daisy Duck

Job Title Admnstr, Business, Asst **Manager** Angelica Pickles
Document Type Performance Document **Period** 01/01/2018 - 12/31/2018
Template UH Staff Performance **Document ID** 38622
Status Evaluation in Progress **Due Date** 12/01/2018

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[Rating History](#)

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Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Long Format | Calculate All Ratings

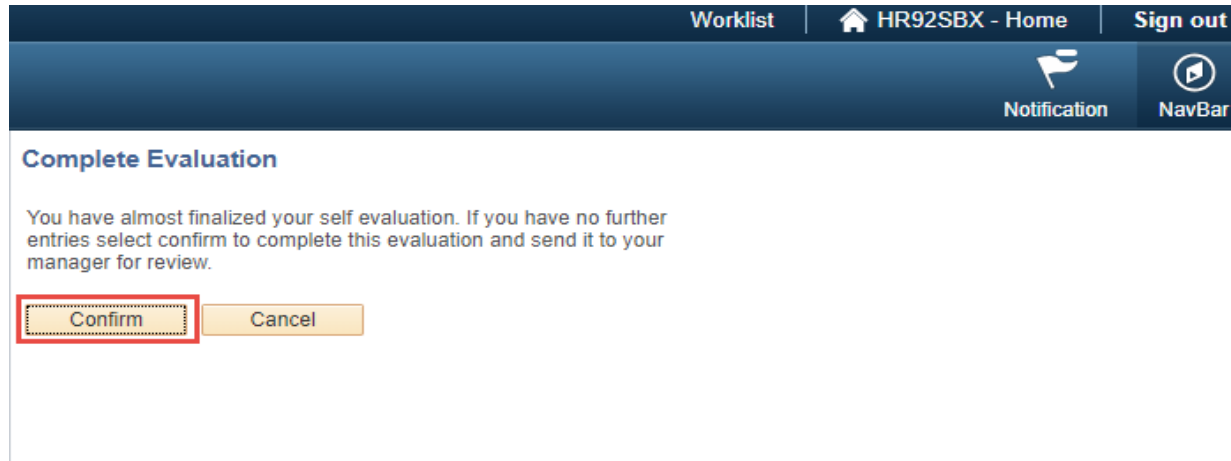
Goals | Responsibilities | Competencies | Overall

Section 5 - Overall Summary

Employee Rating 3-Achieved Expectations 3.40

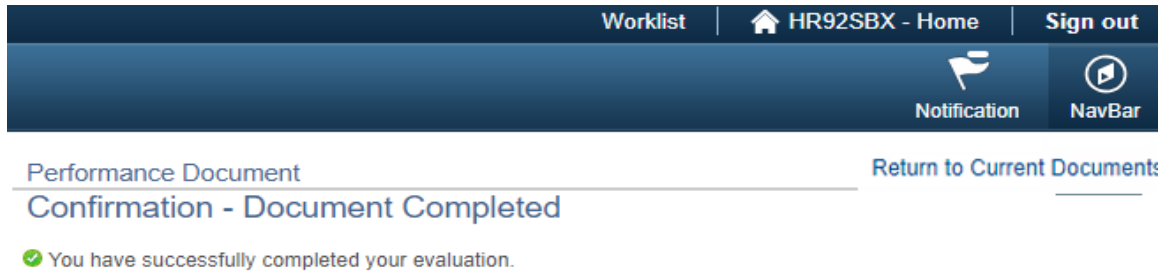
Employee Comments

Once you select Complete, you'll be re-directed to a confirmation page.
Select "Confirm" to finalize the document.



The screenshot shows a dark blue navigation bar at the top with the following items from left to right: 'Worklist', a home icon followed by 'HR92SBX - Home', and 'Sign out'. Below the navigation bar is a dark blue bar containing a flag icon labeled 'Notification' and a play button icon labeled 'NavBar'. The main content area has the heading 'Complete Evaluation' in blue. Below the heading is a paragraph: 'You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.' At the bottom of the content area are two buttons: 'Confirm' (highlighted with a red dashed border) and 'Cancel'.

Once you selected Complete, you'll see a confirmation message letting you know that you successfully completed your Self Evaluation.



The screenshot shows the same dark blue navigation bar as the previous image. Below it is a dark blue bar with a flag icon labeled 'Notification' and a play button icon labeled 'NavBar'. The main content area has the heading 'Performance Document' on the left and a link 'Return to Current Documents' on the right. Below the heading is the title 'Confirmation - Document Completed' in blue. At the bottom of the content area is a green checkmark icon followed by the text: 'You have successfully completed your evaluation.'

Select "Return to Current Documents".

Worklist | HR92SBX - Home | Sign out

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Performance Document
Confirmation - Document Completed

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✔ You have successfully completed your evaluation.

You've now completed your Self Evaluation.

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Current Performance Documents

Daisy Duck

Listed are your current performance documents.

Performance Documents							
Employee ID	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager
0086140	Performance Document	Evaluation in Progress	01/01/2018	12/31/2018	Admnstr, Business, Asst	02/05/2019	Angelica Pickles

If you want to view your completed Self Evaluation,
Select the displayed box to open your document.

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In the Steps and Tasks pane, you'll see a green check mark next to Complete Self Evaluation.
You'll also see a status on your document that shows "The document status is Completed".

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Performance Process

Steps and Tasks

Daisy Duck
Performance Document
01/01/2018 - 12/31/2018 [Overview](#)

- Establish Performance Criteria
Due Date 04/06/2018
- Complete Self Evaluation**
Due Date 12/01/2018
[View](#)
- Review Manager Evaluation
Due Date 02/05/2019

Performance Document

Self-Evaluation - Completed

Daisy Duck

Job Title Admnstr, Business, Asst

Document Type Performance Document

Template UH Staff Performance

Status Completed

Manager Angelica Pickles

Period 01/01/2018 - 12/31/2018

Document ID 38622

Due Date 12/01/2018

Employee Data

Employee ID 0086140

Department H0155 Business Services

Years of Service 21 Years 3 Months

Years in Job 1 Years 7 Months

[Rating History](#)

The document status is Completed.

[Long Format](#)

[Goals](#) | [Responsibilities](#) | [Competencies](#) | [Overall](#)

RATING DEFINITIONS

1 - Needs Improvement (1.0 - 1.79)	Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required.
2 - Generally Meets Expectations (1.80 - 2.79)	Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required.
3 - Achieved Expectations (2.80 - 3.79)	Meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position required. Meets deadlines. Frequently exceeds in one or more established job expectations.
4 - Exceeds Expectations (3.80 - 4.79)	Consistently exceeds departmental performance to a degree that is obvious to supervisor, customers, and peers. Consistently excels in demonstrating the knowledge, skills, and abilities that result in the effective performance of the position requirements. Consistently serves as a role model to others. Truly outstanding level of contribution (well beyond position requirements) during the entire performance period.
5 - Outstanding Performance (4.80 - 5.0)	This rare superior performance is beyond that other high achieving performers would produce and is seldom equaled by peers or colleagues. The individual is widely regarded as innovative or expert in their field by external and internal contacts. The employee made individual contributions within the review period well beyond goals set for their role and achieved outcomes that were widely recognized as having significant impact that produced a measurable fiscal or physical enhancement to the University. The contribution may be recognized, externally to the organization such as regionally, state-wide, nationally, or system-wide as establishing a new standard or business improvement that would be adopted by other higher education institutions or moved the University closer to Tiew One status. The achievements or accomplishments of the individual must be documented and verifiable.