When a performance evaluation form has been launched (sent) to an employee, the employee will receive a notification email. Additionally, the evaluation will show up in the employee’s “To Do” on their home page. The employee can click on “Employee fills out their own performance rating and comments”.

The performance evaluation form can also be accessed by clicking on “Home” and clicking on “Performance”.

Clicking on “Performance” takes the employee to their Performance Inbox. Forms needing action will show up in the Inbox.

1. Due dates for the form are displayed in the inbox.
2. Click on the title of the form.

The employee will complete their self-evaluation.
Click anywhere on the goal window for more details to appear to include “Goal Details” and “Other Details”.

1. **Goal name and measure of success**
2. **Goal details**
3. **Click on “Other Details”**

Under “Other Details”, “Tasks” and “Progress Updates” appear.
Employees have the opportunity to edit their goals before providing a rating by clicking “Edit”.

From here, the employee can make any necessary edits, provide progress updates, and change the completion status and percentage. Once changes have been made, the employee should click, “Save Changes”.
Once the edits have been made to the goal, the rating can be selected by clicking on the drop down arrow next to “Please Select”.

The employee should select from the ratings provided.

For definitions of what the performance ratings mean, employees can click on the question mark next to “Rating” and a drop down will appear defining the ratings.
Once a rating has been selected, the employee is required to provide comments. Employees should use the space provided to type their comments.

The employee can format the text in the comments section by using the icons displayed.

The employee should click “Spell Check” to perform spell check of the text fields they have completed.

The employee should click “Legal Scan” to have the language scanned and reviewed for suggested changes.
Once the employee has provided a rating and comments on their self-evaluation for each goals, the employee should provide a rating and comments for each of the nine University Core Competencies.

To select a rating click on the drop down next to “Please Select”.

Select from the ratings listed.

Once a rating has been selected, the employee is required to provide comments.

Employees can create their own comments, or they can get assistance from the Writing Assistant and edit as desired. To use the Writing Assistant click on the Writing Assistant button.
Three columns are shown, “Improve”, “Meets”, and “Exceeds” with statements under each briefly describing performance.

When a statement is selected, detailed comments are provided in the “Preview Quote Below” space.

By clicking “Place Quote” the quote will become part of the comments on the evaluation form. Multiple quotes can be selected and added to the comments by clicking “Place Quote”.

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1246 West Campus Road | Lawrence, KS 66045 | 785-864-4946 | Fax 785-864-5790 | http://humanresources.ku.edu
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The quotes default to third person and place the employee’s name in the quotes. To change the language to “You” instead of the employee’s name, click on the toggle under “select narrative”.

Once all quotes have been added, the employee can click “Cancel” to go back to the evaluation form.

1 The comments selected from the writing assistant display in the text box in which changes can be made. The comments from the writing assistant can be edited as needed. 2 The formatting can be changed using the options available.

Once a rating and comments have been entered for all competencies, the employee can perform a legal scan and a spell check by clicking on Actions.
From “Actions” select “Spell Check” or “Legal Scan”.

Employees can perform the following functions:
1. Print the form by clicking on the print icon.
2. Save the form as a PDF by clicking on the PDF icon.
3. Save the form by clicking on the save icon.

Once the employee has selected a rating and provided comments for all goals and all competencies, if the employee does not yet want to send it to their supervisor, the employee can select “save and close” to save the form and exit the form.
To send the form to their supervisor, the employee can select, “Send to Manager”. By clicking “Send to Manager” all comments and ratings will be sent to their supervisor to review.

To confirm that they want to send the form to the manager, the employee should click “Send to Manager”. The employee also has the option to go back to the form and make changes by clicking “Cancel and return to form”.

Once the form has been sent to the manager, the form will no longer be in the employee’s inbox. The employee can still view the form by clicking on “En Route”.

Acknowledging Receipt of Evaluation

After the supervisor has met with the employee and completed the evaluation, the employee will receive an email notification that the evaluation form is ready for acknowledgement. The performance evaluation will also show up in the “To Do” on the employee’s home page and clicking on “Employee acknowledges form”.

The employee can also access their performance form by clicking on the drop down menu and selecting “Performance”.

From the Inbox, the employee can click on the name of the evaluation form.

1. The employee will be able to view their rating and comments they provided during the self-evaluation as well as 2. the rating and comments that their supervisor gave them.

The employee will also be able to view their overall performance rating.
The employee will also be able to view their supervisor’s overall comments.

Once the employee has reviewed the evaluation, the employee can provide final comments and then click “Acknowledge and Send to Manager”.

The employee will be given an opportunity to return to the form, or they can continue and click “Acknowledge and send to manager” to send to their supervisor.

Once the form has been sent the form will no longer be in the employee’s inbox but will be available for viewing by clicking on “En Route”.

A read-only version of the form is available for viewing by clicking on the name of the form.