Instructions for Completing Employee Performance Evaluations

Overview

The Employee Performance Evaluation process is a valuable organizational resource. It encourages the objective evaluation of all staff employee performance on an annual basis. This process fosters two-way communication between the supervisor and employee, providing a foundation for an employee development plan. Performance evaluation ratings should focus on position specific job responsibilities as outlined in the position description and appropriately measure behavioral expectations within the workplace.

What are the general guidelines?

Full-time and part-time permanent staff employees should be evaluated on an annual basis. The recommended timeline for completion is July 31st each year. Employee position descriptions should be reviewed annually in order to ensure accurate representation of employee duties as a basis for the evaluation.

Steps to complete the web based Performance Evaluation: CedarInfo > Employee Services > Performance Evaluation

1. The supervisor will initiate the electronic evaluation form by accessing the link provided above. Once in the system, the supervisor should see a snapshot of all staff direct reports. Those that need to be initiated will have a status of “Pending Manager Evaluation”. To take action, click “Fill out Evaluation” link. If you leave the form prior to completion, remember to click “Save” at the bottom of screen. Once complete, click “Send for Approval”, and the status for the evaluation should update to “Pending Approval”.

2. The completed evaluation will then be reviewed by the next-level supervisor, who will receive an email notification to take additional steps. For a Vice President, there will be no next-level review; however, clicking “Send for Approval” will finalize the evaluation and auto-complete to the next step in the process (see step 4).

3. The Next-Level supervisor will review the evaluation and make a determination to “Approve Evaluation”. If the next-level supervisor believes additional changes are required, they should communicate their expectations to the supervisor. The supervisor can continue to make edits within the system for the performance evaluation while the status is still set as “Pending Approval”. Once the Next-Level supervisor approves the evaluation, no additional changes can be made to the electronic document. If you find that additional change are needed, you will need to contact University Human Resources.

4. Once the evaluation has been approved (where applicable), the Supervisor will receive an email notifying them of the updated status. The Supervisor should then see a status of “Approved – Awaiting Employee Meeting” and should schedule a time to discuss the performance evaluation results with the employee. In preparation for the employee meeting, the supervisor should click “Print for Signatures and Comments”. For the best print options, please choose the landscape orientation. The final step within the electronic process is to click “Mark Completed” at the bottom of the evaluation form. This allows the employee to view their evaluation through CedarInfo. Final evaluations can be accessed by clicking on “View”.

5. During the evaluation meeting, opportunity should be given for comments, discussion and signatures. The employee should be provided a copy of the final review and allowed time necessary to add comments in the “Employee Comments” section.
6. Once employee and manager signatures are finalized on the paper form, the original document should be routed to the next-level supervisor for signature. The official signed copy with all appropriate signatures should be forwarded to UHR for the employee personnel file.

**Which form should I use?**

- **Manager Evaluation Form** – This form should be used to evaluate all staff persons who officially supervise permanent staff employees. Supervisory duties should be appropriately defined in the position description.
- **Staff Evaluation Form** – This form should be used to evaluate all staff persons who have no official supervisory duties.

**Which level of rating is appropriate?**

1) **Needs Significant Improvement** - This rating should be used when an employee clearly fails to meet the minimum requirements of the position being evaluated. This rating indicates that the level of job performance is unacceptable and must be improved. The performance in the specified category is consistently below the expected level. Failure to correct noted performance problems will result in disciplinary action up to and including termination. *This rating requires written rationale in the comments column of the evaluation.*

2) **Below Expectations** - This rating should be used when an employee is occasionally performing below job requirements. The employee meets some of the expectations of the job but has not mastered all job activities. This rating indicates improvement is needed.

3) **Consistently Meets Expectations** - This rating should be used when an employee consistently demonstrates full performance of job requirements. The employee exhibits sound judgment and a clear knowledge and mastery of their position. It is expected that most employees will attain this rating.

4) **Exceptional** - This rating should be used when an employee clearly exceeds the level of performance and contributions required by the job. The employee demonstrates performance consistently characterized by high quality work leaving little or nothing to be desired. This rating should be reserved for individuals who make extraordinary contribution well above the established standard. *This rating requires written rationale in the comments column of the evaluation.*