Performance Management
MANAGER
YOUR TASKS

How do I see my assigned Tasks?

1. check the box

2. your tasks will show up after you click in the box
…on the right side of this screen you will see this information:

Not started
In Progress
Completed
Your personal information here

Overview

Performance Evaluation for Classified & Operational Employees

The performance evaluation should reflect the performance during the entire performance year of October 25, 2015 through October 24, 2016.

Employee: Complete the self-assessment of your job performance during the performance year for your supervisor to consider.

Supervisor: Review all documentation from the performance year including notes, interim evaluations and any memos or other documentation related to the employee’s performance or behavior.

Reviewer: The reviewer process is intended to ensure that the Performance Planning & Evaluation Policy is applied appropriately and consistently. The reviewer should review and approve the evaluation before it is discussed with the employee. The reviewer may consult with the supervisor to clarify any questions about the evaluation.

The Reviewer Feedback section is provided if you would like the manager/supervisor to reconsider one or more areas of the evaluation. You may include comments or suggestions for the manager/supervisor to consider. If you would like the manager/supervisor to review your feedback, please follow these steps to return the evaluation.

1. Select the Overview section from the left-hand menu
2. Scroll to the bottom of the screen to select “Reopen Step”
3. A window will open allowing you to choose to reopen the evaluation to the Manager
4. Include any additional comments (optional) and choose “Save”
5. You can move to other reviewers or log out of the system

The Manager will be able to Reopen the evaluation and view your comments. The Manager can resubmit the evaluation to you for review of any changes.

The Review Steps are listed below and also on the left side of the screen. To get started completing the review, scroll down to the bottom of the screen and click the Get Started button.

Review Step Progression

- Self Assessment
- Manager Completion
- Reviewer Approval
- Evaluation Discussion
- Review of Evaluation Prior to Meeting with Manager
- Employee Sign-Off

Get Started
Manager Evaluation Sections

- Self-assessment does not have this section
- Self-assessment does not have this section
- Sign after discussion with employee
Performance Evaluation
Step Progression

1. Self Assessment
2. Manager Completion
3. Reviewer Approval
4. Evaluation Discussion
   - Review of Evaluation Prior to Meeting with Manager
5. Employee Sign-Off

Or,
Manager Sign-Off

Get Started
Core Competencies are the knowledge, skills and abilities that an employee applies when performing a job. These are broad competencies that transcend the duties of a particular position but influence the level of an employee's achievement. The following are the basic competencies indicative of a proficient employee:

- Communication Skills
- Job Knowledge/Professional Development
- Leadership Skills/People Development
- Organizational Citizenship
- Problem Solving/Decision Making
- Relationship Building

Instructions for completing this section:
1. Select an achievement level for each competency. Note - The achievement levels reflect the current definition followed with the definition for the 2016/17 performance year. For example: Satisfactory/Solid Performer
2. Add supporting comments for the achievement level selected in the comment box.

**Communication Skills**

Is skilled at oral and written communications
Demonstrates effective interpersonal communications with subordinates, peers and supervisors

**Example Rating:**
Satisfactory/Solid Performer

**Comments:**

You can see the employee’s ratings and comments.
Ratings

current ratings

new ratings
Ratings

click ? for ratings detailed description
Rating Scale definitions

Unsatisfactory/Under-Performer
- An employee whose work fails to meet the expectations for the position; generally falling well below performance objectives for core responsibilities (even though sometimes approaching objectives); provides inadequate support to the mission of the unit. The employee does not demonstrate proficiency in the basic competencies. Effective for the 2016/17 Performance Evaluation the rating will be Under-Performer. The employee’s performance generally fails to meet the established expectations or requires frequent supervision and/or the redoing of work. The individual is not performing at the level expected for employees doing this type of work. Unacceptable job performance is due to the employee's lack of knowledge, skill or effort.

Satisfactory/Solid Performer
- An employee whose work does not meet all performance objectives, requires improvement in one or more areas to satisfactorily perform core responsibilities. The employee has not demonstrated proficiency in one or more
Relationship Building

Maintains healthy working relationships
Team player
Good listener
Appreciates diversity of others

Unsatisfactory/Un...

Comments:

Back  Save and Exit  Save and Continue  Submit
Your personal information here

Development/Learning Goals or Achievements

For this performance evaluation period, please provide comments for the following:
- Strengths
- Suggested Improvements
- Development/Learning Goals or Achievements

Describe the strengths of this employee.

Comments:

Indicate areas of suggested improvement.

Comments:
Comment on special assignments, significant achievements and/or other results.

Comments:


ajayaga

[Save and Continue]
*Classified & Operational Performance Evaluation*

**Core Job Responsibilities**

Please list the core job responsibilities that are primary and essential to the work performed and represent the most important functions or duties of the position. For each job responsibility listed, please follow these steps:

1. Select a rating for the job responsibility
2. Briefly describe the job responsibility
3. Provide supporting comments for the rating

**Note:** The position description can be used as a reference to identify the primary and essential duties.

**Briefly describe the core primary and essential job responsibility.**

Satisfactory/Solid...

Describe the core primary and essential job responsibility. Provide comments to support the rating selected:

Select

Provide exceptional service to walk-ins, phone calls and emails. Respond to questions, resolves issues and route calls appropriately beyond scope of position knowledge. Check-in with HR personnel to notify of scheduled appointments.

Assist walk-in applicants with the application process (to include setting them up on the computer and aid if necessary, in the maintenance of application system).
INSTRUCTIONS

NOTE: Do not include 5%, 10% job responsibilities, only the **five** most important job duties (there are five text boxes included on this form)
Briefly describe the core primary and essential job responsibility.

Select

Describe the core primary and essential job responsibility. Provide comments to support the rating selected.

[Buttons: Back, Save and Exit, Save and Continue, Submit]

save and continue
*Classified & Operational Performance Evaluation

Employee Comments

Comments, suggestions or information you would like considered in addition to your self assessment can be provided below.

Comments:

Your personal information here

Changes have not been submitted and will not be finalized until submission

Save and Continue

Save and Exit

Back

Submit

save and continue
Your personal information here

Reviewer Feedback

Comments or Suggestions for Manager/Supervisor to consider

To be completed by Manager/Supervisor: Provide any additional comments for the Reviewer

for the reviewer

the manager can enter comments for the reviewer here
The manager can enter a comment for the reviewer here
### *Classified & Operational Performance Evaluation*

**Overview**

- Core Competencies
- Development/Learning
- Core Job Responsibilities
- Employee Comments
- Reviewer Feedback

**Summary**

Overall Rating: 3.0/5.0

<table>
<thead>
<tr>
<th>Category</th>
<th>Rating</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Competencies</td>
<td>3.0</td>
<td></td>
</tr>
<tr>
<td>Development/Learning Goals or Achievements</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Core Job Responsibilities</td>
<td>3.0</td>
<td></td>
</tr>
<tr>
<td>Employee Comments</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Reviewer Feedback</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Overall</td>
<td>3.0</td>
<td></td>
</tr>
</tbody>
</table>

Changes have not been submitted and will not be finalized until submission.

Submit your personal information here.

Submit

100%
Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

[Button] Cancel
[Button] Submit
*Classified & Operational Performance Evaluation

Your personal information here

100%
Do NOT X out!

Please Log Out – the “gear” icon is on the top right side of the screen

Click on the “gear”
YOUR TASKS

How do I see my assigned Tasks?

1. check the box

2. your tasks will show up after you click in the box
### Scheduled Tasks

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Classified-Operational Performance Evaluation as Manager of</td>
<td>UAT multiple ees/no emails</td>
</tr>
<tr>
<td>Review Classified Operational Performance Evaluation of</td>
<td>UAT multiple ees/no emails 10.21.2015</td>
</tr>
<tr>
<td>Review Classified Operational Performance Evaluation of</td>
<td>UAT multiple ees/no emails</td>
</tr>
</tbody>
</table>

**Employee’s name here**

**Employee’s name here**

**Employee’s name here**

- Click on a link
...on the right side of this screen you will see this information:

Not started
In Progress
Completed
Reviewer Evaluation Sections

first five sections for review only

reviewer can provide feedback here
Performance Evaluation
Step Progression

1. Self Assessment
2. Manager Completion
3. Reviewer Approval
4. Evaluation Discussion
5. Employee Sign-Off

Or, Manager Sign-Off
Your personal information here

Click to start
Core Competencies

Core Competencies are the knowledge, skills and abilities that an employee applies when performing a job. These are broad competencies that transcend the duties of a particular position but influence the level of an employee’s achievement. The following are the basic competencies indicative of a proficient employee:

- Communication Skills
- Job Knowledge/Professional Development
- Leadership Skills/People Development
- Organizational Citizenship
- Problem Solving/Decision Making
- Relationship Building

Instructions for completing this section:
1. Select an achievement level for each competency. Note - The achievement levels reflect the current definition followed with the definition for the 2016/17 performance year. For example: Satisfactory/Solid Performer
2. Add supporting comments for the achievement level selected in the comment box.

Manager’s ratings and comments
Employee’s ratings and comments
<table>
<thead>
<tr>
<th>Task</th>
<th>Rating</th>
<th>Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeks input and positive feedback from others</td>
<td></td>
<td>Makes timely decisions</td>
</tr>
<tr>
<td>Makes timely decisions</td>
<td></td>
<td>Communicates decisions to all affected parties</td>
</tr>
<tr>
<td>Communicates decisions to all affected parties</td>
<td></td>
<td>Resolves conflict in a positive manner</td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>Rating: 3</td>
<td>Satisfactory/Solid Performer</td>
</tr>
<tr>
<td><strong>Self</strong></td>
<td>Rating: 4</td>
<td>High/Advanced Performer</td>
</tr>
<tr>
<td>Review: <em>Classified &amp; Operational Performance Evaluation</em></td>
<td></td>
<td>Time: 10/21/2016 6:04 AM</td>
</tr>
</tbody>
</table>

**Relationship Building**

<table>
<thead>
<tr>
<th>Task</th>
<th>Rating</th>
<th>Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintains healthy working relationships</td>
<td></td>
<td>Team player</td>
</tr>
<tr>
<td>Maintains healthy working relationships</td>
<td></td>
<td>Good listener</td>
</tr>
<tr>
<td>Maintains healthy working relationships</td>
<td></td>
<td>Appreciates diversity of others</td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>Rating: 3</td>
<td>Satisfactory/Solid Performer</td>
</tr>
<tr>
<td><strong>Self</strong></td>
<td>Rating: 5</td>
<td>Exceptional Performer</td>
</tr>
</tbody>
</table>
Comment on special assignments, significant achievements and/or other results.

Save and continue
Briefly describe the core primary and essential job responsibility.

Provide exceptional service to walk-ins, phone calls and emails. Respond to questions, resolve issues and route calls appropriately beyond scope of position knowledge. Check-in with HR personnel to notify of scheduled appointments.

Assist walk-in applicants with the application process (to include setting them up on the computer and aid if... more...

Briefly describe the core primary and essential job responsibility.

Briefly describe the core primary and essential job responsibility.

Briefly describe the core primary and essential job responsibility.

Briefly describe the core primary and essential job responsibility.
Your personal information here

*Classified & Operational Performance Evaluation

Employee Comments

Comments, suggestions or information you would like considered in addition to your self assessment can be provided below.

Comments

Your comments here

Save and Continue

Save and Exit

Back
REVIEWER IS NOT PROVIDING FEEDBACK TO THE MANAGER:
Follow the next four slides (#42-45)

Your personal information here
If you would like the manager/supervisor to reconsider one or more areas of the evaluation, select **Reviewer Feedback** and include comments or suggestions for the manager/supervisor to consider.

Once you complete your review, **do not** choose the option to **Submit**.

1. Select the **Overview** section from the left-hand menu.
2. Scroll to the bottom of the screen to select "Reopen Step".
3. A window will open allowing you to choose to reopen the evaluation to the Manager.
4. Include any additional comments (optional) and choose "Save".
5. You can move to other reviews or log out of the system.

The Manager will be able to Reopen the evaluation and view your comments. The Manager can resubmit the evaluation to you for review of any changes.

**do not** click this box

**do not enter a comment in this text box**

**save and continue**
## Summary

### Satisfactory/Solid Performer

<table>
<thead>
<tr>
<th></th>
<th>Manager Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Competencies</td>
<td>2.8/5.0 Satisfactory/Solid Performer</td>
</tr>
<tr>
<td>Development/Learning Goals or Achievements</td>
<td>N/A</td>
</tr>
<tr>
<td>Core Job Responsibilities</td>
<td>3.0/5.0 Satisfactory/Solid Performer</td>
</tr>
<tr>
<td>Employee Comments</td>
<td>N/A</td>
</tr>
<tr>
<td>Reviewer Feedback</td>
<td>N/A</td>
</tr>
<tr>
<td>Overall</td>
<td>2.9/5.0 Satisfactory/Solid Performer</td>
</tr>
</tbody>
</table>

**Click next**
Do NOT X out!

Please Log Out – the “gear” icon is on the top right side of the screen

Click on the “gear”
REVIEWER IS PROVIDING FEEDBACK TO THE MANAGER:
Follow the next four slides
Reviewer Feedback

Reviewer Feedback
(only intended to be used if a change is requested)
The review process is intended to ensure that the Performance Planning and Evaluation Policy is applied appropriately and consistently.

If you would like the manager/supervisor to reconsider one or more areas of the evaluation, select **Reviewer Feedback** and include comments or suggestions for the manager/supervisor to consider.

Once you complete your review, **do not** choose the option to **Submit**.

1. Select the **Overview** section from the left-hand menu
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3. A window will open allowing you to choose to reopen the evaluation to the Manager
4. Include any additional comments (optional) and choose **"Save"**
5. You can move to other reviews or log out of the system

The Manager will be able to Reopen the evaluation and view your comments. The Manager can resubmit the evaluation to you for review of any changes.
Your personal information here

Reviewer Feedback

(only intended to be used if a change is requested)

The review process is intended to ensure that the Performance Planning and Evaluation Policy is applied appropriately and consistently.

If you would like the manager/supervisor to reconsider one or more areas of the evaluation, select Reviewer Feedback and include comments or suggestions for the manager/supervisor to consider.

Once you complete your review, do not choose the option to Submit.

1. Select the Overview section from the left-hand menu
2. Scroll to the bottom of the screen to select 'Reopen Step'
3. A window will open allowing you to choose to reopen the evaluation to the Manager
4. Include any additional comments (optional) and choose 'Save'
5. You can move to other reviews or log out of the system

The Manager will be able to Reopen the evaluation and view your comments. The Manager can resubmit the evaluation to you for review of any changes.

Reviewer Feedback

Enter your comments in this text box
Reviewer Feedback

(only intended to be used if a change is requested)

The review process is intended to ensure that the Performance Planning and Evaluation Policy is applied appropriately and consistently.

If you would like the manager/supervisor to reconsider one or more areas of the evaluation, select Reviewer Feedback and include comments or suggestions for the manager/supervisor to consider.

Once you complete your review, do not choose the option to Submit.

1. Select the Overview section from the left-hand menu
2. Scroll to the bottom of the screen to select "Reopen Step"
3. A window will open allowing you to choose to reopen the evaluation to the Manager
4. Include any additional comments (optional) and choose "Save"
5. You can move to other reviews or log out of the system

The Manager will be able to Reopen the evaluation and view your comments. The Manager can resubmit the evaluation to you for review of any changes.
If you would like the manager/supervisor to reconsider one or more areas of the evaluation, select **Reviewer Feedback** and include comments or suggestions for the manager/supervisor to consider.

Once you complete your review, do not choose the option to **Submit**.

1. Select the **Overview** section from the left-hand menu
2. Scroll to the bottom of the screen to select **"Reopen Step"**
3. A window will open allowing you to choose to reopen the evaluation to the Manager
4. Include any additional comments (optional) and choose **"Save"**
5. You can move to other reviews or log out of the system

The Manager will be able to Reopen the evaluation and view your comments. The Manager can resubmit the evaluation to you for review of any changes.

**Reviewer Feedback**

- ✓

**Comments or Suggestions for Manager/Supervisor to consider**

I have feedback
Scroll down and reopen the step
The manager will get an email with an invitation to view your feedback.

The Manager can edit the evaluation as needed and resubmit the evaluation to you for final review and signature.
Email the Manager gets notifying him/her that evaluations has re-opened

Dear [Name of manager here]

The *Classified & Operational Performance Evaluation for [Name here] has been reopened to you. Please review comments in the Reviewer Feedback section. Once you consider comments and suggestions from the reviewer, the evaluation will be resubmitted for final review and approval.

Thank you,

Office of Human Resources

William & Mary
Chartered 1693
Once the manager re-submits the evaluation to the reviewer, the reviewer can access the evaluation, sign and submit it as completed.
Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

submit
Do NOT X out!

Please Log Out – the “gear” icon is on the top right side of the screen
MANAGER AND EMPLOYEE DISCUSSION
Both the employee and the manager will get an email stating that the Performance Evaluation is available for reviewing prior to the discussion meeting.
The employee can now access the evaluation to check the performance rating

<table>
<thead>
<tr>
<th>Performance Reviews</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Review</strong></td>
</tr>
<tr>
<td>Performance Evaluation for Classified &amp; Operational Employees</td>
</tr>
</tbody>
</table>
Schedule the meeting

• You can review the Performance Evaluation on the computer or printed format.
*Classified & Operational Performance Evaluation

You can print evaluation

Your personal information here
Schedule the meeting

- Signatures can only be submitted via your digital signature on the computer.

- HR will not accept a signed paper copy.
Ways to sign:

• Method 1:
  – Both, manager and employee on the same computer:
    • Manager signs. Logs out. Employee logs in using a different browser and signs.

• Method 2:
  – Manager and employee sign on different computers.
Quick note

The system will log out users after four (4) hours of being idle.
Questions?

HR is here to help!

Feel free to contact Mane Pada at 221-3685 or mepada@wm.edu.

You can also submit questions and/or concerns to: askHR@wm.edu
Thank you!