## **Completing the Performance Evaluation**

## **Overview: Understanding the USPS Performance Evaluation Process**

The performance evaluation process commences with a supervisor (rater) completing the performance evaluation document by rating the employee in all applicable sections. After the document has been completed, the rater must submit the document to the higher lever supervisor, if applicable

After the document is reviewed/approved by the higher level supervisor, the supervisor (rater) should schedule a review discussion with the employee. After the review discussion is held with the employee, the supervisor (rater) must select the *Share with Employee* button, select the *Request Acknowledgement* button, and then select *Confirm* to indicate that the evaluation has been discussed, in person, with the employee. After the Confirm button has been selected by the supervisor (rater), an automated email notification is sent to the employee with instructions to review the performance evaluation, make any necessary comments and acknowledge the performance evaluation online via Self Service.

Once the employee has acknowledged the performance evaluation document and added any necessary comments, the supervisor (rater) must finalize the evaluation by navigating to the employee's performance document and marking it as *Complete*.

Note: The performance evaluation document is not considered complete until it has been completed by the supervisor (rater), reviewed by the higher level supervisor (where applicable), discussed with the employee, acknowledged by the employee and finalized by the rater.

## Procedure

This section provides step-by-step guidance in completing the performance evaluation.



Step	Action
1.	Login to my FSU – my.fsu.edu.
2.	Click the Human Resources link.
3.	Click the Main Menu link.
4.	Click the Manager Self-Service link.
5.	Click the Performance Management link. Performance Management
6.	Click the <b>Performance Documents</b> link. Performance Documents
7.	Click the Current Documents link. Current Documents
8.	Click the <b>Employee Name</b> link.

Favorites 🔻 🛛 Mair	n Menu 👻 > 🛛 Manager Self	Service  + > Performance	Management 🔹 > Pe	rformance Docur	nents 🔻 👌 Current	Documents
Current Perform	mance Documents					
Listed are the current p	performance documents for which	you are the Manager.				
Filter Criteria						
Performance Documents			Personalize	e   Find   🖙   🎰	FIRST 🖤 1-2 OT 2 🖤 Last	
Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Charles Champion	USPS Annual Performance Review	Evaluation in Progress	01/01/2015	12/31/2015	Library Associate	02/12/2016
Gregg Gold	USPS Annual Performance Review	Evaluation in Progress	01/01/2015	12/31/2015	Library Associate	02/12/2016



Step	Action
9.	Expand all the sections by clicking the <b>Expand All</b> link.



Step	Action
10.	Click the <b>Rating Description</b> icon to view a description of applicable ratings for the <b>FSU</b> <b>Behavioral Expectations</b> Section.
11.	Rate employee appropriately.
12.	Click the Select Proficiency button. Select Proficiency

	Rating	Description
0	1-Below Satisfactory	Employee does not demonstrate behavioral expectation.
0	2-Satisfactory	Employee demonstrates behavioral expectation.
0	3-Above Satisfactory	Employee demonstrates and exemplifies this expectation and serves as an example for others.
Select Proficiency		

Step	Action
13.	Continue to rate the employee appropriately in all areas under <b>FSU Behavioral Expectations</b> and add comments at the end of the Section.
	NOTE: Ratings may also be selected by clicking the drop down rating box and selecting the appropriate rating.

Organizational Commitment
Description: Demonstrates a productive, ethical work style that is compliant with University and department policies and procedures.
Manager Rating 2-Satisfactory
Created By Template 11/25/2015 9:25AM
Customer/Stakeholder Focus
Description: Demonstrates a commitment to service excellence in addressing the needs of his/her customers and stakeholders whether they be faculty, students, fellow employees, parents or citizens.
Manager Rating 2-Satisfactory

Step	Action
14.	<b>Section 2</b> : <b>Responsibilities</b> on the Position Profile represent the Essential and Marginal functions on the employee's position description.
	The <b>Responsibilities</b> section of performance evaluations are populated from corresponding data in the Position Profile. The description field will only display the first 254 characters of the Responsibility Description.
	If you find discrepancies in these sections, you may need to update the employee's position description.
15.	Continue to select appropriate ratings for the <b>Responsibilities</b> section.
	Click the Manager Rating drop down.     Manager Rating
16.	Add Comments at the end of the <b>Responsibilities</b> section. Comments are recommended, especially if an employee receives a rating of <b>Below Satisfactory</b> within a section.

Step	Action
17.	<b>Section 3</b> : <b>Competencies</b> on the Position Profile represent the Knowledge, Skills and Abilities section of the Position Description.
	Reminder: The Competencies section of the performance evaluation is populated from corresponding data in the Position Profile. The description field will only display the first 254 characters of a Competency Description.
	If you find discrepancies in these sections, you may need to update your employee's position description.
18.	Click the <b>Rating Description</b> icon to view a description of applicable ratings for the <b>Competencies</b> Section.
19.	Rate the employee appropriately. The example below shows the employee's rating for Competency 1 as <b>Proficient</b> . Click the <b>2-Proficient</b> option.
20.	Click the Select Proficiency button. Select Proficiency

Pro	ficiencies	
	Rating	Description
0	0-None	Skill, ability or applicable knowledge not performed at the basic level for the competency.
0	1-Basic	Skill, ability, or applicable knowledge typically needed to be performed at fundamental and entry level for the competency.
۲	2-Proficient	Skill, ability, or applicable knowledge typically needed to perform at a fully functional and experienced level for the competency.
0	3-Advanced	Skill, ability, or applicable knowledge typically needed to perform beyond a functional and experienced level; approaching or at expert level for the competency.
0	4-Not Applicable	Skill, ability or applicable knowledge no longer a required competency.
	Select Proficiency	
Retu	Irn	

Step	Action
21.	Continue to select appropriate ratings for the <b>Competencies</b> section and add comments under "Competencies Summary".

USPS Annual Performance Review			
Manager Evaluation - Update and Submit			
Section 3 - Competencies			
* Section 5 - competencies			
Enter ratings and comments for each competency listed below, if applicable. Rating Scale: 0-None; 1-Basic; 2-Proficient; 3-Advanced; 4-Not Applicable			
Expand   Ollapse			
Competency 1: Customer Service			
Description: Ability to demonstrate effective customer service skills.			
Target Rating: 2-Proficient			
Manager Rating 2-Proficient			
Created By Profile 11/25/2015 9:25AM			
Competency 2: Effective Communication			
Description: Ability to communicate effectively verbally and in writing.			
Target Rating: 2-Proficient			
Manager Rating 2-Proficient			
Created By Profile 11/25/2015 9:25AM			

Step	Action
22.	Section 4: The Employee Goals section is Optional for USPS employees. If performance goals
	are established for the employee, then the supervisor may use the Manager Comment Box to list
	the goals, and to rate the employee's performance.

ating Scale:0-Below Satis	factory; 1-Satisfactory; 2-A	Above Satisfactory; 3-Ex	emplary; 4-Not Ap	plicable	
ioals Summary					
Manager Comments	Font	- Size - B	<u>I</u> <u>U</u> ]=	:≣ <u>A</u> - ⊠-	

Step	Action
23.	Section 5: Click the Rating Description icon to view a description of applicable Overall Summary ratings.
24.	Rate the employee's <b>Overall Summary</b> appropriately.
25.	Click the Select Proficiency button. Select Proficiency

Pro	ficiencies	
	Rating	Description
0	1-Below Satisfactory	Employee performance level fails to meet adequate expectations and requirements for the position. Sustained improvement needed.
0	2-Satisfactory	Employee performance level meets adequate expectations and requirements for the position but not approaching higher levels of performance. Working towards an above satisfactory rating.
0	3-Above Satisfactory	Employee performance level is higher than adequate expectations and requirements for the position, and approaching the highest levels of performance. Working towards an exemplary rating.
0	4-Exemplary	Employee performance level exceeds expectations, surpasses requirements, and is at the highest level of performance. Work serves as an example for others.
	Select Proficiency	
Retu	im	

Step	Action
26.	Add Comments at the end of the <b>Overall Summary</b> section. Comments are recommended, especially if an employee receives a rating of <b>Below Satisfactory</b> within a section.
	For an Overall <b>Below Satisfactory</b> rating, you <u>must</u> contact Employee and Labor Relations in the Office of Human Resources prior to issuing the evaluation to the employee.
	Enter <b>Comments</b> appropriately.
27.	Click the <b>Check Language</b> button located near the top of the page to check the performance evaluation document for inappropriate language used to describe the employee's performance in the Comments sections.
	Check Language

All comments entered in this document will become a part of the official record and will be available for manager/employee viewing.

🕞 Expand All | 🕦 Collapse All | 🧹 Check Language

Step	Action
28.	If the language is used in an appropriate context, select the <b>Ignore</b> button.
	If inappropriate language is found, review the Language Suggestions table for suggestions.
	Select the <b>Change</b> button to edit the text.

Manager Evaluation	
Check Language	
Word/Phrase found medical	
Found in	Change
Description Overall Summary Section Results The employee has performed Above Satisfactory in all areas, despite her recent medical leave of absence	Ignore
	Close
Apply         Cancel           Language Suggestions         Is this word(s) relevant or appropriate to the employee's job performance? Use c personal problems, religious or political affiliations, medical conditions or family is statement if used in this context.	are when describing age, ssues. Please revise your

Step	Action
29.	Edit the language or phrase to remove the inappropriate reference.
	For questions on appropriate language content, please contact Employee and Labor Relations in the Office of Human Resources.
30.	Click the <b>Apply</b> button.

Manager Evaluation	
Check Language	
Word/Phrase found medical	
Found in	
Description Overall Summary Section	Change
Results 54 4 b Foot Dira D 7 11	Ignore
	Ignore All
	Close
The employee has performed Above Satisfactory in all areas.	
Apply Cancel	
Language Suggestions Is this word(s) relevant or appropriate to the employee's job performance? Use c: personal problems, religious or political affiliations, medical conditions or family is statement if used in this context.	are when describing age, sues. Please revise your

Step	Action
31.	Click the <b>Ok</b> button after all language change suggestions have been reviewed and Changed/Ignored.
32.	Review the document to ensure that all language changes processed correctly.

proval"; the evaluation will then e employee.	be routed to the higher level supervisor for appr	oval, if applicable. Once approved, you s
he evaluation has been discus	Message	for Review", and then "Request Acknow
nments entered in this docu		nd will be available for manager/emp
xpand All   🜔 Collapse All	The language check is complete. (4600,31)	
ection 1 - FSU Behaviora		
ng Scale: 1-Below Satisfacto	ory; 2-Satisfactory; 3-Above Satisfactory	
xpand   🕟 Collapse		

Step	Action
33.	Click the <b>Save</b> button.
	Save
34.	Click the Submit for Approval button.
	Submit for Approval
NOTE:	Document must be submitted for Higher Level Supervisor's review (when required) before taking further action, including discussing the evaluation with the employee.
	Once the Higher Level Supervisor reviews the action, an automated email notification will be sent to the supervisor (rater) indicating the evaluation has been reviewed/approved or denied. If the document is denied, the supervisor will be required to re-submit the updated document for the Higher Level Supervisor review/approval. Once the document is marked Approved by the Higher Level Supervisor, the supervisor (rater) will receive an automated email notification that the action has been completed.
35.	<i>STOP!</i> You have completed the first steps in completing the performance evaluation process.
36.	What's next? <u>Schedule and conduct a performance review discussion with your employee.</u>
	<b>Current Performance Documents:</b> mvFSU > HR > Main Menu > Manager Self Service >
	Performance Management > Performance Documents > Current Documents.

Step	Action
37.	Click the <b>Employee Name</b> link.
38.	Once you have discussed the performance review with your employee, click the <b>Share with Employee</b> button.
39.	Click the Confirm button.
40.	You will need to immediately refresh the page by clicking on the <b>Share with Employee</b> button found in the <i>Steps and Tasks panel</i> of the document. The <i>Steps and Tasks panel</i> is located to the left of the page.
NOTE:	Once the page has been refreshed, the Next Action: <b>Request Acknowledgement</b> can be performed. The page may also be refereshed by clicking the <b>Current Documents</b> link found at the top of the page or by clicking the refresh icon.



Step	Action
41.	The supervisor (rater) must confirm that the performance evaluation review meeting has been held by completing the Next Action. Click <i>Request Acknowledgement</i> button.           Request Acknowledgement
42.	Click the <i>Confirm</i> button.
NOTE:	Document status is now Pending Acknowledgement by the employee. An automated email notification will be sent to the employee with instructions to review the performance evaluation, make any necessary comments, and acknowledge the performance evaluation online via Self- Service.For instructions on how to complete the Employee Actions, see training guide, Employee Actions: Acknowledging the Performance Evaluation

Current Performance Documents						
Listed are the current p	performance documents for which	n you are the Manager.				
Filter Criteria						
Performance Docu	iments			Personalize	Find   💷   🔢 🛛	First 🛈 1-4 of 4 🕑 Last
Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Charles Champion	USPS Annual Performance Review	Pending Acknowledgement	01/01/2015	12/31/2015	Library Associate	02/12/2016
Gregg Gold	USPS Annual Performance Review	Evaluation in Progress	01/01/2015	12/31/2015	Library Associate	02/12/2016

Step	Action
43.	After the employee has acknowledged the performance evaluation document, the supervisor (rater) will receive an automated email. A web link will be provided in the text. Click on the link and it will take you directly to the performance review document ( <b>IF</b> you are not currently logged into OMNI you will be prompted to log in).
	<b>Navigation to Current Performance Documents:</b> my FSU > HR> Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents.
44.	Click the Employee Name.

Current Performance Documents						
Listed are the current performance documents for which you are the Manager.						
Filter Criteria						
Performance Documents Personalize   Find   🖉   🔢 First 🕚 1-4 of 4 🕑 Last						
Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Charles Champion	USPS Annual Performance Review	Acknowledged	01/01/2015	12/31/2015	Library Associate	02/12/2016
Gregg Gold	USPS Annual Performance Review	Evaluation in Progress	01/01/2015	12/31/2015	Library Associate	02/12/2016

Step	Action	
45.	The final step in the performance evaluation process is to finalize the document. Click the <b>Complete</b> button.	
	Complete	

The current performance evaluation process is now complete. The document is now viewable as a historical document to both the Employee and Supervisor. **Navigation to Performance Historical Documents:** myFSU > HR > Main Menu > Self Service **or** Manager Self Service > Performance Management > Performance Documents > Historical Documents

## **The REOPEN Button**

If you select to **REOPEN** the evaluation after the document is marked as **Request Acknowledgement**, the document will be returned to "*In Progress*" status and the supervisor will need to repeat the approval process beginning with Step 1 above. This option may be used if changes must be made to the performance evaluation document after the supervisor marked the document as **Request Acknowledgement**. The document may not be reopened after the document has been marked **COMPLETE** by the supervisor.

For more information on the ePerformance process, contact Employee and Labor Relations in the Office of Human Resources.