

Manager Evaluation

The Manager Evaluation can be started prior to or after an employee completes their Self Evaluation. Employee comments, ratings and attachments will not appear in the Manager Evaluation until after the Self Evaluation is marked complete.

Reminder emails are sent 30, 15 and 7 days before the Manager Evaluation is due, if not already completed.

NOTE: While completing the Manager Evaluation, click the **Save** button to save progress.

Follow institution and manager recommendations for using this tool as part of the performance management process.

Performance Criteria

1. Review the performance criteria and employee Self Evaluation feedback on each tab.
 - If the Employee Comments sections says, "Employee has not completed their self evaluation", the employee has not marked their Self Evaluation as complete.
 - If the comment box is empty or a rating is blank no information was entered by the employee for this item.
2. Use evaluation tools to document feedback. Evaluation tools, tabs and evaluation tools will vary by institution and evaluation type.
 - **Manager Rating** – Select a value from the drop down.
NOTE: To see more information about the ratings, click the yellow paper icon next to the field.
 - **Manager Comments** – Enter information into the Manager Comments field.
WARNING: Copying and pasting from another document may cause issues with punctuation.
 - Formatting tools are available at the top of the comment box.
 - Spell Check is available using the book and check icon.
 - **Summary Section** – Enter overall feedback for that section in the Manager Comments field.
NOTE: If a section summary rating exists, it is likely a calculated rating based on an average of the section's item ratings and cannot be changed.

Overall Summary

1. Click the **Overall Summary** tab.
2. Select a **Manager Rating** from the drop down, if applicable.
NOTE: For many institutions, the Overall Summary rating is a calculated average based on other section summary ratings and cannot be changed.
3. Enter **Manager Comments** to provide feedback on overall performance.

Employee Acknowledge

The Employee Acknowledge section provides the employee an opportunity to provide feedback when reviewing and acknowledging the completed Manager Evaluation.

Comments will not appear until after the document has been shared with the employee.

Attachments

Attachments can be added during the Self Evaluation and Manager Evaluation steps and are visible to both employee and manager. All attachments are included in the completed evaluation when added to the employee's electronic Personnel File.

WARNING: Attachments must be a PDF document.

1. Click the **Add Attachment** hyperlink.
2. Click **Browse** to find the document.
3. Click **Upload**.
4. Enter a **Description** (optional).
5. To delete an attachment, click the trash can icon next to the document to delete, click **OK**.

NOTE: Employees and managers can only delete the documents that they have added.

Share with Employee

1. Click **Share with Employee**, in the upper right corner.

WARNING:

- Do not share the document with the employee until after the employee has marked their Self Evaluation complete and all other participants have marked their Participant Evaluations complete, if applicable.
- All ratings must be entered before the document can be shared with the employee. If ratings were not entered a red error message will appear below the Employee Data section on the document.

2. Click **Confirm**.

NOTE:

- Once the document has been shared with the employee, it can no longer be edited.
- An email notification is sent to the employee requesting acknowledgement.