

Human Resources

Division of Administration & Finance

Performance Evaluation

EMPLOYEE SELF EVALUATION GUIDE

UH Human Resources - Compensation

Select the Performance Module

ORACLE		Employee Self Service	
	Time	Payroll & Compensation	My Personal Info
	Benefits Summary	Performance	Total Rewards
	Training	Miscellaneous	Approvals
	TRAM Workcenter	My Campus Account	

The Performance module automatically opens up to your "Current Documents"

Select the displayed box; this will open your current ePerformance document so that you can complete your Self Evaluation.

Employee Self Service				Performance		
Daisy Duck ⊙ Admnstr, Business, Asst						
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In the Steps and Tasks pane, you can see where your document is at in the process and what steps and tasks are still needed.

The document automatically opens up to the phase it's currently in. Favorites 🔻 Main Menu 🔻 Worklist A HR92SBX - Home Sign ou 1 Ø ORACLE' Notification NavBa Performance Process 0 « Save | Complete Performance Document Steps and Tasks 0 0-Self-Evaluation - Update and Complete Frint | E Notify | R Export **Daisy Duck** Daisy Duck Performance Document Job Title Admnstr. Business, Asst Manager Angelica Pickles 01/01/2018 - 12/31/2018 Overview Document Type Performance Document Period 01/01/2018 - 12/31/2018 Template UH Staff Performance Document ID 38622 🕑 🥝 Establish Performance Criteria Due Date 12/01/2018 Status Evaluation in Progress Due Date 04/06/2018 Complete Self Evaluation Temployee Data Due Date 12/01/2018 Update and Complete Employee ID 0086140 Department H0155 **Business Services** Review Manager Evaluation Years of Service 21 Years 3 Months Years in Job 1 Years 7 Months Due Date 02/05/2019 Rating History Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager. ELLong Format | Calculate All Ratings Goals Responsibilities Competencies Overall Section 1 - Employee Goals

You'll need to go through each of the sections below to assign a rating and enter comments on the individual items. Please note that Sections 3 and 4 are both located on the Competencies Tab

TAB	Section To Be Completed
GOALS	Section 1 - Employee Goals
RESPONSIBILITIES	Section 2 - Responsibilities
COMPETENCIES	Section 3 - Competencies
COMPETENCIES	Section 4 – Customer
	Service

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Update and Complete		Employee ID 0086140			
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		E+ Long Format 🗐 Calculate All Ratings		-65	
		Goals Responsibilities Competencies Overall			
		Section 1 - Employee Goals			
		Enter ratings and comments for each goal listed below, if applicable.			

Select the Goals Tab

The items will be condensed, click "Expand" to expand all items

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Click the drop down arrow to assign a rating for this individual goal.

- 1 Needs Improvement
- 2 Generally Meets Expectations
- 3 Achieved Expectations
- 4 Exceeds Expectations

*See Rating Definitions on Last Page of Manual.

Enter your comments (if any) for this individual goal in the Employee Comments box.

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»>	Performance Documer Self-Evaluation - U Goals Responsibilities Section 1 - Employee Enter ratings and commen Expand • Collapse Goal 1: GOAL 1 Description : Employee	t Jpdate and Competenci ee Goals is for each goal li adds SMART goa	Complete es Overall sted below, if applicable.		Save	Complete	e fort
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Once you're done with this goal rating and employee comment, continue these same steps for each remaining item (Goal 2, Goal 3, etc..).

Once you've finished rating each Goal, select the Calculator icon in the Goals Summary section. This will calculate the ratings assigned for each Goal and display the "Goals Summary Employee Rating".

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You can also include additional overall comments for your Goals section as a whole.

Summary Weight	20 % (not less than 10%)	
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	Employee can enter additional comments regarding the goals that were set for them if they'd lke.	

Created By Krista McElroy Last Modified By Angelica Pickles 06/11/2018 1:41:50PM 06/11/2018 3:05:15PM

Below is an example of the Goals Section with all Ratings and Comments entered.

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Once you've finished with the GOALS section select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation.

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Now that you've evaluated all of your Goals, you're ready to complete Section 2 - Responsibilities.

Select the "Responsibilities" Tab.

The items will be condensed, click "Expand" to expand all items



Repeat the same process as you did in Section 1 - Goals.

Enter a Rating for each Responsibility.

Enter a comment (if needed) in each Responsibilities "Employee Comment" section.

Select "SAVE" in the top right hand corner of your document.

Once you've clicked SAVE, a green check mark and a note will reflect "You have successfully saved your evaluation.

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Responsibility 3: Business Administration- Duty			

Once you've entered Ratings and/or Comments for each individual Responsibility, select "Collapse".

The individual Responsibilities will condense.

Select the Calculator icon in the Responsibilities Summary section.

This will calculate the ratings assigned for each Responsibility and display the "Responsibilities Summary Employee Rating".

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Now that you've evaluated all of your Responsibilities, you're ready to complete Section 3 Competencies and Section 4 Customer Service. Both of of these Sections are located on the "Competencies" Tab.

Select the "Competencies" Tab.

The items will be condensed, click "Expand" in each Section (Competencies / Customer Service) to expand all items.

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Section 3 - Competencies Enter ratings and comments for each competency and behavior listed below, if applicable. Expand Collapse	
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Repeat the same process as you did in Section 1 - Goals and Section 2 - Responsibilities.

SECTION 3 - COMPETENCIES

Enter a Rating for each Competency item.

Enter a comment (if needed) in each Competencies "Employee Comment" section.



Once you've entered Ratings and/or Comments for each individual Competency, select "Collapse".

The individual Competencies will condense.

Select the Calculator icon in the Competencies Summary section.

This will calculate the ratings assigned for each Competency and display the "Competencies Summary Employee Rating".

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SECTION 4 - CUSTOMER SERVICE

Enter a Rating for each Customer Service item.

Enter a comment (if needed) in each Customer Service "Employee Comment" section.

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Once you've entered Ratings and/or Comments for each individual Customer Service item, select "Collapse".

The individual Customer Service items will condense.

Select the Calculator icon in the Customer Service Summary section.

This will calculate the ratings assigned for each Customer Service item and display the "Customer Service Summary Employee Rating".

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You've now evaluated all of your Goals, Responsibilities, Competencies and Customer Service items.

Now select the "Overall" Tab.

This is where your Overall Performance Review Rating will be.

Click the "Calculate All Ratings" blue icon to calculate your Overall Employee Rating.

You can also include additional overall comments for your overall Performance Review.

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BEFORE FINALIZING YOUR SELF EVALUATION, ENSURE YOU'VE ENTERED RATINGS FOR EACH ITEM IN EACH SECTION.

TAB	Section
GOALS	Section 1 - Employee Goals
RESPONSIBILITIES	Section 2 - Responsibilities
COMPETENCIES	Section 3 - Competencies
COMPETENCIES	Section 4 - Customer Service

Now that you've completed your Self Evaluation and verified all items had ratings, you're ready to finalize your Self Evaluation.

Select "Complete" in the top right hand corner of your document next to Save.

Once you select Complete, you'll be re-directed to a confirmation page.

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Select "Confirm" to finalize the document.



Once you selected Complete, you'll see a confirmation message letting you know that you successfully completed your Self Evaluation.



You have successfully completed your evaluation.

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If you want to view your completed Self Evaluation,

Select the displayed box to open your document.



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In the Steps and Tasks pane, you'll see a green check mark next to Complete Self Evaluation. You'll also see a status on your document that shows "The document status is Completed".

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RATING DEFINITIONS

1 - Needs Improvement (1.0 - 1.79)	Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required.				
2 - Generally Meets Expectations (1.80 - 2.79)	Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required.				
3 - Achieved Expecatations (2.80 - 3.79)	Meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position required. Meets deadlines. Frequently exceeds in one or more established job expectations.				
4 - Exceeds Expectations (3.80 - 4.0)	Consistently exceeds departmental performance to a degree that is obvious to supervisor, customers, and peers. Consistently excels in demonstrating the knowledge, skills, and abilities that result in the effective performance of the position requirements. Consistently serves as a role model to others. Truly outstanding level of contribution (well beyond position requirements) during the entire performance period.				