



PERFORMANCE MANAGEMENT

Manual

Performance Management

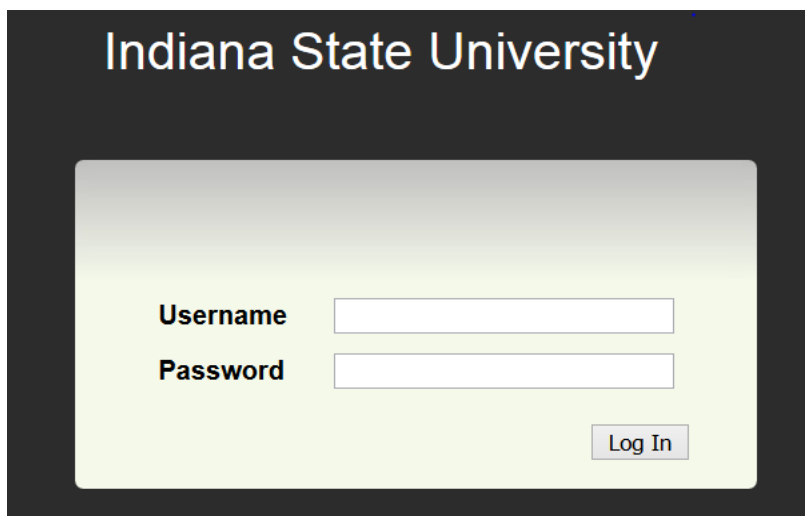
This module makes the performance review process easy to monitor and execute. Employees and supervisors can keep track of performance throughout the evaluation period; they have the ability to add progress notes and update goals as needed. Email notifications and workflow states keep the employees and supervisors abreast of the progress of the evaluations, and who needs to take action at each stage in the process.

Annual Performance Evaluation

All benefits eligible exempt and non-exempt staff employees must complete an annual performance evaluation every year.

The evaluation period for non-exempt (bi-weekly) employees is April 1st through March 31st. The evaluation period for exempt (monthly) employees is May 1st through April 30th.

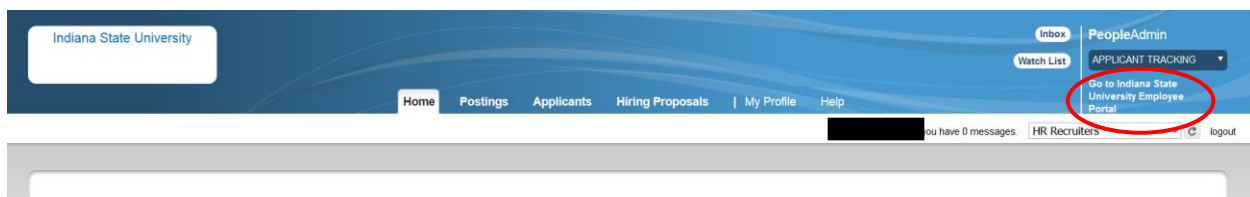
Log into <https://jobs.indstate.edu/hr> or from the Human Resources website main page select the link on the bottom right that reads Applicant Tracking System 7.0 (New Version).



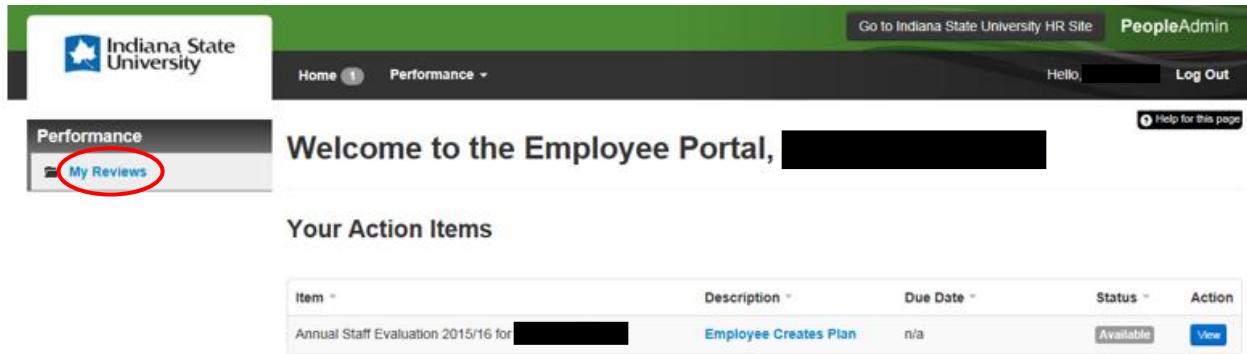
Enter your sycamore username and password.

The first module you will see when you log in is the Applicant Tracking System unless you have set up a different default module on login.

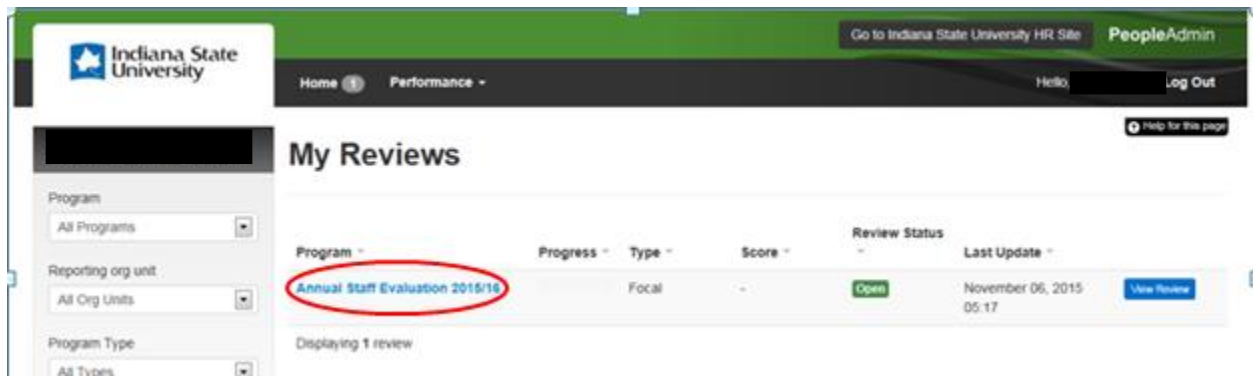
Click on **Go to Indiana State University Employee Portal** as shown below.



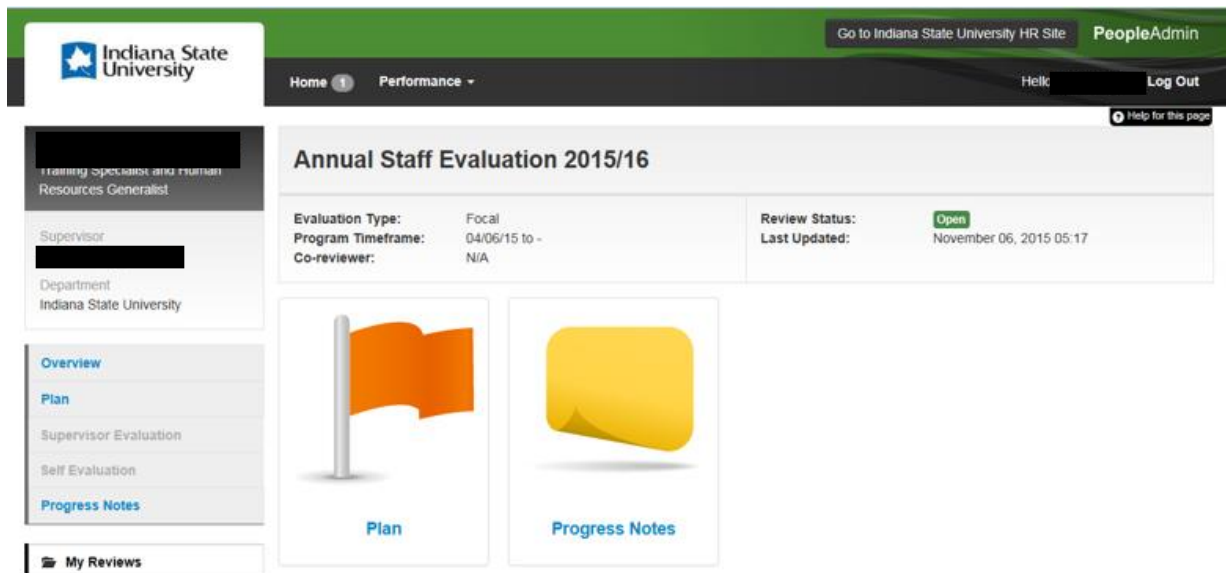
This will direct you to the following screen. Click on My Reviews



You will see the type of evaluation that is open for completion. In this case, the Annual Staff Evaluation is open. Click on **Annual Staff Evaluation**.



You will be directed to the following page with the **Plan** and **Progress Notes** icons.



The **Progress Notes** feature is available to both the supervisor and the employee which allows them to enter notes and upload documents to track their progress during the performance period. While progress notes are private, they should be business appropriate because they can be accessed if subpoenaed.

When you click on **Progress Notes** you will be directed to the following page where you can enter your information and save. To enter additional notes, click on **New Progress Note**, and save. Click on **Add Attachment** to upload a document.

Annual Staff Evaluation 2015/16

Training Specialist and Human Resources Generalist

Supervisor
Department
Indiana State University

Overview
Plan
Supervisor Evaluation
Self Evaluation
Progress Notes
My Reviews

Evaluation Type: Focal
Program Timeframe: 04/06/15 to -
Co-reviewer: N/A

Review Status: Open
Last Updated: November 06, 2015 05:17

Progress Notes

New Progress Note

Title (Optional)

* Note

Add attachment

Save

Completing Self-Evaluation

At the appropriate time toward the end of the evaluation period, you will be notified by email to complete the self-evaluation.

On the left side of the page, click on **My Reviews**

Indiana State University

Home Performance

Go to Indiana State University HR Site PeopleAdmin

Hello, Beatrice Log Out

Performance

My Reviews

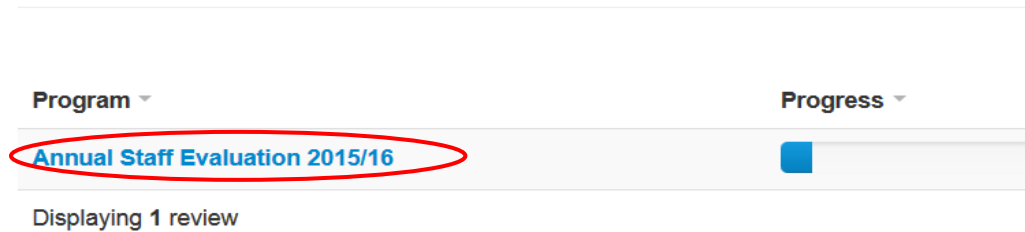
Welcome to the Employee Portal

Your Action Items

Item	Description	Due Date	Status	Action
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Select **Annual Staff Evaluation**

My Reviews



Program ▾ Progress ▾

Annual Staff Evaluation 2015/16

Displaying 1 review

When completing the self-evaluation, select an employee rating for each category unless that category does not apply. Comments are highly recommended for each job factor but comments are required if you have rated yourself as Outstanding Performance, Performance Needs Improvement, or Unsatisfactory Performance.

The next tab is **Community Engagement** so please read the instructions and complete as appropriate.

Next are **Current Goals, Objectives, and Plan**. These are the goals you set at the beginning of the evaluation period. Enter the actual completion date, if appropriate, the goal status, and any comments you wish to add and click **Next**.

The next tab is **Education**. Please answer the questions and click **Next**.

The final tab is **New or Renewed Certifications**. Please answer the questions and then you can either **Save Draft** if you want to save and complete the review later or select **Complete**.

Once you complete your review, you will see a green bar at the top of the page stating **The Self Evaluation has been marked as complete**. Your supervisor will receive an email stating they need to complete the **Supervisor Evaluation**.

When the supervisor completes the **Supervisor Evaluation**, the second level supervisor will receive an email notification and will review the self-evaluation and supervisor evaluation.

After the second level supervisor **Approves** the evaluation, Human Resources will review and **Acknowledge** the **Annual Staff Evaluation** and submit back to the supervisor.

The supervisor will conduct the **Evaluation Review Meeting** with you to discuss your performance and select **Complete**. When the meeting is complete, the employee will log back into the system and **Acknowledge** the meeting and the Annual Staff Evaluation process is complete.

Performance Process

Below is a chart that explains the order in which the performance tasks will be completed for the Annual Staff Evaluation.

