

## Instructions for Performance Evaluation at the status of President Review Pending

1. Log in to [Performance Management System](#) as President.

\*\*NOTE: If you have more than one user type, look at the top of the screen to see which user type is active. If it does not say President, follow these steps to change your user type.

- Under the ADMIN heading, click on the “Change User Type” link
  - Choose President
  - Then click on “Change Group”
2. Under the EVALUATIONS heading, click on the “Active Evaluations” link. Scroll down to “Search Active Evaluations”. Select “Check All” or the appropriate status and click “Search”.
3. To select the evaluation for your review, Click on “View/Edit” beneath the position title.
4. Click the “Edit” button.
5. Review each tab and navigate by clicking on “Continue to Next Page”.
6. You can save your work and return to the Performance Evaluation by clicking “SAVE AND STAY ON THIS PAGE” at any time. If you are going to be away from the evaluation longer than 10 minutes, be sure to save your work and logout of the system. This will prevent you from being timed out and losing any data.
7. The first tab is “Documents”. Human Resources has attached the Job Description for this position. The employee and Chair/Supervisor may attach additional documents such as org charts, warnings, performance improvement plans, certificates of completion, etc.
8. Click on “Continue to Next Page”.
9. The second tab is “Evaluation Details”. (No edits allowed at President level)
- Annual Non-Exempt evaluations begin April 1 and end March 31 of the following year.
  - Annual Exempt evaluations begin May 1 and end April 30 of the following year.
10. Click on “Continue to Next Page”.
11. The third tab is “Current Goals, Objectives and Plan”. You may do the following actions:
- To view the employee’s “Goals/Objective”, click on “View”. (No edits allowed at President level)
  - When you have reviewed this section, click “Continue to Next Page”.

12. The fourth tab is “Job Factors”. For the list of rating definitions click on the link “Please click here for a list of rating definitions” located above the first job factor. Note: N/A’s are not used to calculate the overall score. (No edits allowed at President level).
  - Supervisor and employee comments are **required** for “Outstanding Performance”, “Performance Needs Improvement” and “Unsatisfactory Performance”. Supervisor comments are recommended for “Very Good Performance” and “Good Performance”.
  - When you have reviewed this section, click “Continue to Next Page”.
13. The fifth tab is “FUTURE Goals, Objectives and Plan” (three to six goals are recommended ex: departmental attendance guidelines, training, etc.). You may do the following actions:
  - To view the employee’s “Goals/Objective”, click on “View”. (No edits allowed at President level)
  - When you have reviewed this section, click “Continue to Next Page”.
14. The sixth tab is “Rating Worksheet”. Performance evaluation meetings between the Chair/Supervisor and employee are **required** and should be completed prior to the performance evaluation being submitted to the Dean/Administrator, Vice President and President for review. When you have reviewed this section, click “Continue to Next Page”.
15. The seventh tab is “Notes/History”. You may add comments pertaining to the performance review in this section. When you have completed this section, click “Continue to Next Page”.

**\*\*CAUTION:** Once you enter a note and save it by clicking the “Add Notes” button and confirming, that note is permanently added to the evaluation, even if you cancel out of the evaluation without saving.
16. You may select from the following actions:
  - “Submit to “Dean/Administrator” (Use only if the Dean/Administrator needs to make additions/corrections) – Once additions/corrections are made by the Dean/Administrator the evaluation will be returned for your review.
  - Submit Evaluation to HR – This will complete the Performance Evaluation process.
17. Click “Confirm” to finalize your submission. A green check mark should appear indicating that the evaluation has been successfully submitted.

If you have questions, please contact Human Resources at extension 4114.

Thank you,  
Human Resources