



Overview/Description

This document provides step-by-step instructions on how to navigate to **Complete Manager Evaluation** on the Performance Process page. This page is used by the Manager to share Performance Evaluation with Employee, Request Acknowledgement, and Submit for Approval. It is recommended to create overall goals for the employee prior to completing an annual assessment document.

Prerequisite(s)

Manager Completes Review
Employee Completes Self Evaluation

Instructions

1. Step

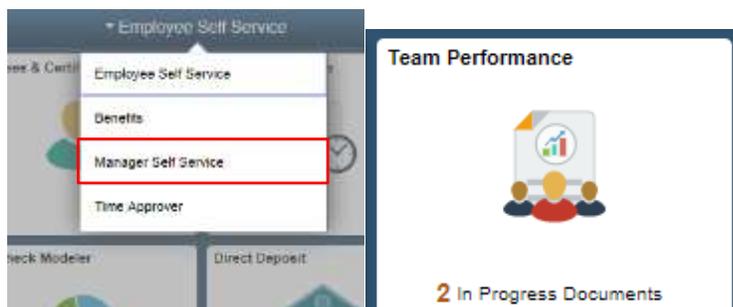
Complete Manager Evaluation for Performance Process Page

1.1. Sub step

Complete Manager Evaluation gives the Manager the opportunity to share the Performance Evaluation with Employees. Next the Manager will need to meet with the Employee to discuss Performance Evaluation.

Navigation

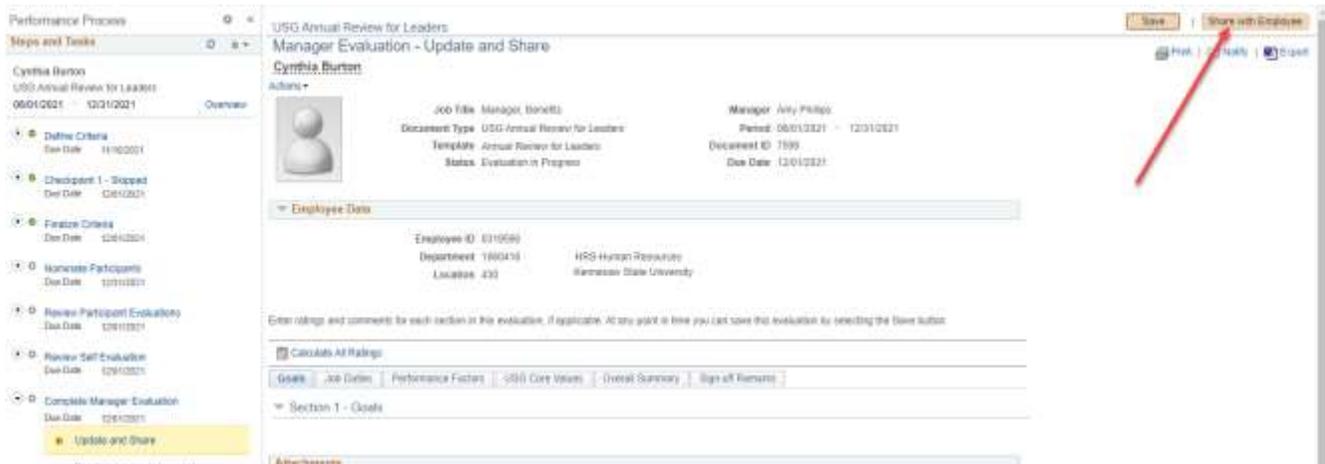
Manager Self Service > Team Performance > Current Documents



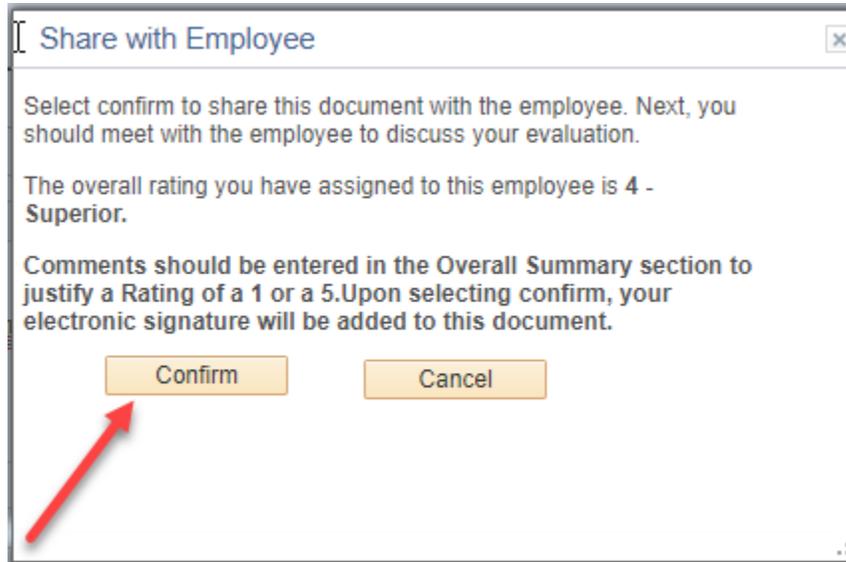
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Briana Mizrahi Student Assistant	USG Annual Review for Leaders	Define Criteria	06/01/2021 01/31/2022	12/17/2021 >
Cynthia Burton Manager, Benefits	USG Annual Review for Leaders	Track Progress - Checkpoint 1	06/01/2021 12/31/2021	12/01/2021 >
Briana Mizrahi Student Assistant	USG Annual Review for Leaders	Define Criteria	06/01/2021 12/31/2021	10/02/2021 >



- a. The Manager shares the Performance Evaluation with the Employee by clicking on **Share with Employee**.



- b. The Manager will need to click on **Confirm** to share the document with the Employee. Next, the Manager will need to meet with the Employee to discuss the Performance Evaluation.





Performance Process

Steps and Tasks

Cynthia Burton
USG Annual Review for Leaders
06/01/2021 - 12/31/2021 [Overview](#)

- Define Criteria
Due Date 11/16/2021
- Checkpoint 1 - Skipped
Due Date 12/01/2021
- Finalize Criteria
Due Date 12/01/2021
- Nominate Participants
Due Date 12/31/2021
- Review Participant Evaluations
Due Date 12/01/2021
- Review Self Evaluation
Due Date 12/01/2021
- Complete Manager Evaluation
Due Date 12/01/2021
 - Update and Share
 - Pending Acknowledgement

USG Annual Review for Leaders

Confirmation - Shared with Employee

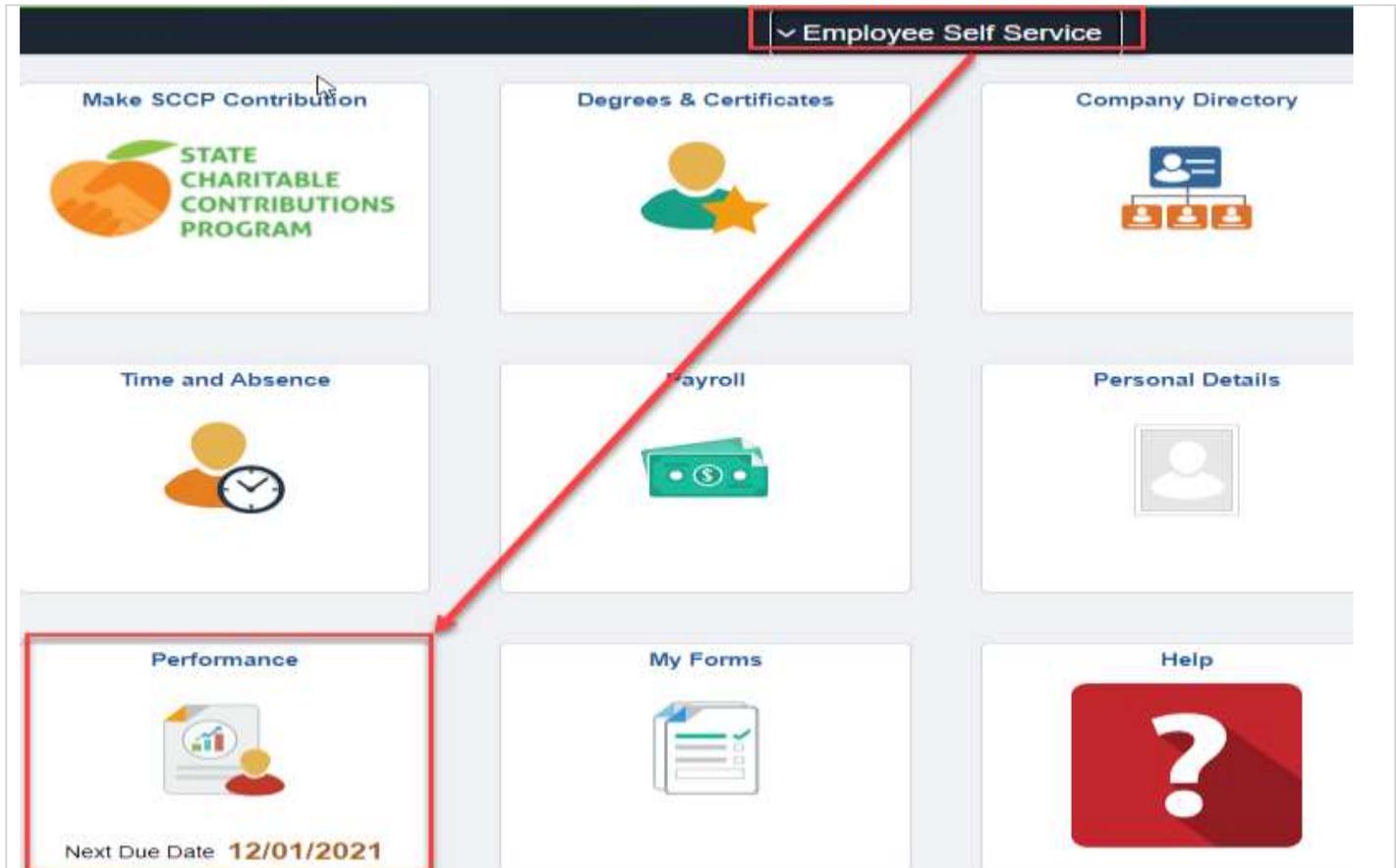
You have successfully shared your evaluation with the employee.

1.2. Sub step

After the Performance Review has been held, the Manager should request that the Employee login into Self Service and Acknowledge the document.

Navigation

Employee Self Service > Performance > select the desire document



a. The Employee will have Annual Review document listed in **My Current Documents**



b. At this point, the performance evaluation ratings and comments have been finalized by both the Manager and Employee and can be viewed. Here are examples of those comments in different sections of the document:



Performance Factors tab

Performance Process

USG Annual Review for Staff
Manager Evaluation - Acknowledge
Lindsey Seipel

 Job Title: Employee Relations Manager
Document Type: USG Annual Review for Staff
Template: USG Annual Review for Staff
Status: Pending Acknowledgment

Manager: Amy Phillips
Period: 01/01/2019 - 11/30/2019
Document ID: 1219
Due Date: 10/31/2019

Employee Data

Employee ID: 0252661
Department: 1060416
Location: 430
Rating History

HRS-Human Resources
Kennesaw State University

Goals | **Performance Factors** | USG Core Values | Institutional Values | Ethics Compliance | Professional Dignity | Final Remarks | Overall Summary

Section 2 - Performance Factors

Expand | Collapse

Communication

Description: The extent to which employee is proficient and professional in oral and written communication. This includes listening, understanding, remembering, and following oral or written instructions, asking for clarification when necessary, and providing information to others in a clear, complete and concise manner.

Manager Rating: 3 - Exemplary 5.00

Manager Comments: Employee checks in daily with the team and reviews schedule. Email turn around for the employee is less than 24 hours.

Employee Rating: 4 - Superior

Employee Comments: ALWAYS ASK QUESTIONS TO MAKE SURE I AM CLEAR ON THE ASSIGNMENT

USG Core Values tab

Performance Process

USG Annual Review for Staff
Manager Evaluation - Acknowledge

Goals | Performance Factors | **USG Core Values** | Institutional Values | Ethics Compliance | Professional Dignity | Final Remarks | Overall Summary

Section 3 - USG Core Values

Expand | Collapse

Accountability

Description: We firmly believe that education in the form of scholarship, research, teaching, service, and developing others is a public trust. We will live up to this trust through safeguarding our resources and being good stewards of the human, intellectual, physical, and fiscal resources given to our care.

Manager Rating: 3 - Successful 3.70

Manager Comments:

Employee Rating:

Created By: Template 07/11/2019 3:21PM

Excellence

Description: We will perform our duties to foster a culture of excellence and high quality in everything we do.

Manager Rating: 3 - Successful 3.00

Manager Comments:

Employee Rating:

Created By: Template 07/11/2019 3:21PM

Integrity



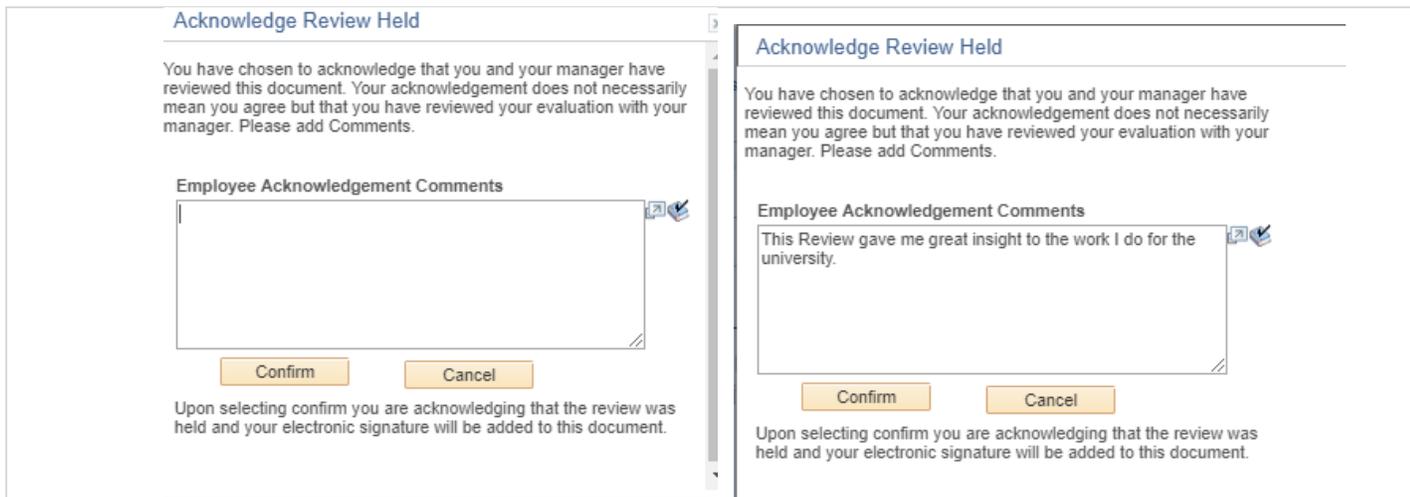
Overall Summary tab

The screenshot shows the 'Overall Summary' tab of a performance review. At the top, it says 'Performance Process' and 'USG Annual Review for Staff'. Below that is 'Manager Evaluation - Acknowledge'. There is a 'Job Setup' section with a profile picture and fields for Job Title (Employee Relations Manager), Manager (Amy Phillips), Document Type (USG Annual Review for Staff), Template (USG Annual Review for Staff), Status (Pending Submanagement), Period (11/1/2019 - 11/30/2019), Document ID (1218), and Due Date (03/12/2018). An 'Employee Data' section shows Employee ID (8352681), Department (1050418), Location (420), and Rating History. A navigation bar includes 'Goals', 'Performance Factors', 'USG Core Values', 'Institutional Values', 'Ethics Compliance', 'Professional Dignity', 'Final Remarks', and 'Overall Summary'. The 'Overall Summary' section shows a 'Manager Rating' of 4.00 and a 'Manager Comments' box containing the text: 'As Employee continues to become acclimated to the work environment and values of the university, more tasks will be assigned to the Employee.' Below that is an 'Employee Rating' of 4.00 and an 'Employee Comments' box containing the text: 'I HAVE LEARNED SO MUCH IN MY CURRENT ROLE I WOULD LIKE TO ADVANCE WITH THE UNIVERSITY AND CONTINUE LEARNING.'

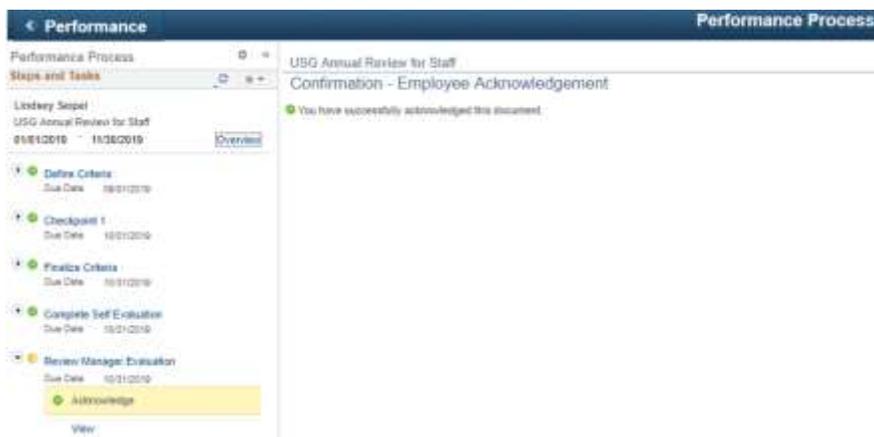
c. Employee selects **Acknowledge**

This screenshot shows the same 'Overall Summary' tab, but with the 'Acknowledge' button highlighted by a red arrow. The 'Acknowledge' button is located in the top right corner of the page, next to a 'Save' button. The rest of the page content is identical to the previous screenshot.

d. Employee chooses Acknowledge and is required to add comments before confirming.



- e. The Employee has selected Confirm and the Employee's electronic signature is now added to the document.

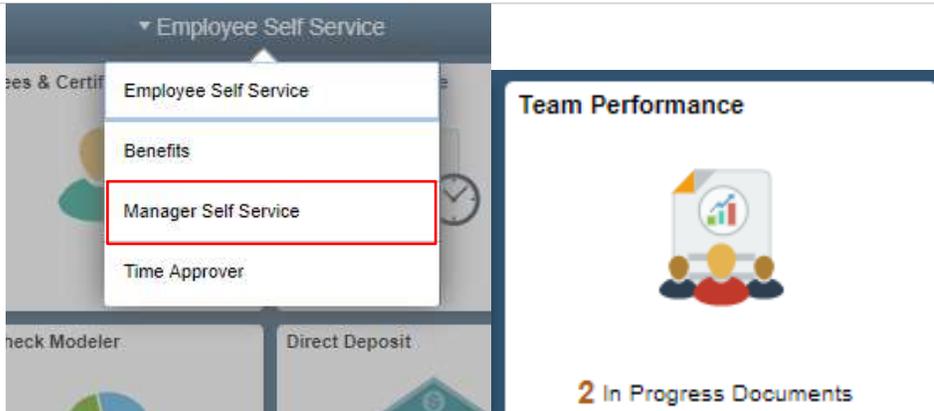


1.3. Sub step

The Manager can now see that the Employee has **Acknowledged** that the Performance Evaluation review was held, the Employee received the Performance Evaluation, and reviewed the documents. The Manager can now submit the evaluation for approval.

Navigation

Manager Self Service > Team Performance > Current Documents



The screenshot shows the 'Manager Self Service' page with the 'Team Performance' section. It features a table of 'Current Documents' with columns for Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. A 'Create Documents' button is visible in the top right.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Orie Thornton Manager III	USG Professional Review	Approval - Submitted	08/02/2018 08/31/2018	08/23/2018
Orie Thornton Manager III	USG Annual Review for Staff	Evaluation in Progress	08/02/2018 08/31/2018	08/02/2018
Orie Thornton Manager III	USG Annual Review for Staff	Evaluation in Progress	08/01/2018 08/31/2018	08/01/2018
Jasmin Forts Manager III	USG Annual Review for Leaders	Evaluation in Progress	01/01/2018 12/31/2018	12/01/2018
Orie Thornton Manager III	USG Annual Review for Staff	Evaluation in Progress	01/01/2018 12/31/2018	12/01/2018
Lindsey Seigel Employee Relations Manager	USG Annual Review for Staff	Evaluation in Progress	01/01/2018 12/31/2018	12/01/2018
Jasmin Forts Manager III	USG Annual Review for Staff	Track Progress - Checkpoint 1	01/01/2018 12/31/2018	11/01/2018

- a. The Manager can now see that the Employee has **Acknowledged** that the Performance Evaluation review was held, the Employee received the Performance Evaluation, and reviewed the documents. The Manager can now submit the evaluation for approval.



Team Performance Performance Process

USG Annual Review for Staff
Manager Evaluation - Submit

Lindsay Seipel

Job Title: Employee Relations Manager
Document Type: USG Annual Review for Staff
Template: USG Annual Review for Staff
Status: Acknowledged

Manager: Amy Phillips
Period: 01/01/2019 - 11/30/2019
Document ID: 1219
Due Date: 11/31/2019

Employee Data

Employee ID: 032381
Department: 100410 HRS-Human Resources
Location: 430 Knoxville State University

Rating History

View Graphical Rating | Reply

Goals Performance Factors USG Core Values Institutional Values Ethics Compliance Professional Development Final Remarks Overall Summary

Section 1 - Goals

Attachments

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
Fair_Use_Checklist_11-10-17_final.pdf	Fair Use Checklist Example	Employee and Manager	09/07/2019 4:21:03PM	Amy Phillips

Audit History

Action	Date/Time
Created By Amy Phillips	07/31/2019 3:21:57PM
Acknowledged By Lindsay Seipel	08/27/2019 5:35:39PM
Last Modified By Lindsay Seipel	08/27/2019 5:35:39PM

b. The Manager has submitted the Performance Evaluation for approval and must confirm.

Team Performance Performance Process

USG Annual Review for Staff
Manager Evaluation - Complete

Lindsay Seipel

Employee ID: 032381
Department: 100410 HRS-Human Resources
Location: 430 Knoxville State University

Rating History

View Graphical Rating | Reply

Goals Performance Factors USG Core Values Institutional Values Ethics Compliance Professional Development Final Remarks Overall Summary

Section 1 - Goals

Attachments

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
Fair_Use_Checklist_11-10-17_final.pdf	Fair Use Checklist Example	Employee and Manager	09/07/2019 4:21:03PM	Amy Phillips

Audit History

Action	Date/Time
Created By Amy Phillips	07/31/2019 3:21:57PM
Acknowledged By Lindsay Seipel	08/27/2019 5:35:39PM
Last Modified By Lindsay Seipel	08/27/2019 5:35:39PM



Submit for Approval

Select confirm to submit this document for approval.

Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.

Confirm

Cancel



The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists various steps in the process. The 'Submit for Approval' step is highlighted in yellow. The main content area shows a confirmation message: 'Confirmation - Approval Submitted' and 'You have successfully submitted this document for approval.' The top navigation bar includes 'Team Performance' and 'Performance Process'.

- c. The **Complete Manager Evaluation** step is now complete. The Performance Evaluation is now complete and **Pending Approval**. Once the document is approved, the status of the document will be automatically set to complete and will be found under **Historical Documents**.

This screenshot shows the 'Manager Evaluation - Pending Approval' step. The left sidebar shows the 'Complete Manager Evaluation' step highlighted. The main content area displays details for the evaluation, including the employee's name (Jack Dale), department (USG Office Personnel), and location (FBI). It also shows the manager's name (Amy Pridgen) and the document's status as 'Pending Approval'. A table at the bottom lists the document's history, showing it was created by Amy Pridgen on 11/19/2021.