INSTRUCTIONS

THE PLANNING STAGE

Job Functions - The supervisor, utilizing suggestions from the employee, shall select duties from the employee’s most recent position description and develop success criteria for each duty.

It shall be mandatory that all supervisors be rated on the job function of “completing EPMS planning stage(s) and evaluation(s) in a timely manner” as part of their supervisory responsibilities.

Objectives - This section allows the supervisor to include any additional special projects or program assignments that are not on the position description but that are assigned to the employee during the rating period. Objectives are optional, but if used, success criteria are required for each objective.

Performance Characteristics - Performance characteristics and their definitions should be directly related to the employee’s job and may be selected by the supervisor and the employee from a list developed by the Division of Human Resource Management. All management and supervisory employees are required to be reviewed on “promoting equal opportunity”.

University Goals - Each employee is required to be reviewed on at least one of the listed University goals as part of their performance characteristics. The goals that are selected must be directly supported by the employee's job duties. Documentation of the relevance to the goal(s) is required and will be included under "Individualized Goal Support". The goal(s) will be chosen with the assistance of the supervisor.

The supervisor should meet with the employee to discuss the position description and how it relates to the job functions and objectives for the upcoming year. After this discussion, the supervisor shall complete the planning stage of the document. Prior to discussing the completed planning stage with the employee, the supervisor will present the document to the reviewing officer for signature. The supervisor will then meet with the employee to review the final plans for the year and obtain the employee’s signature. In those instances where the supervisor and the employee cannot agree, the supervisor's decision shall be final. The completed planning stage will be placed in the employee’s departmental personnel file for referral during the rating period and used as an evaluation document at the end of the review period.

THE EVALUATION STAGE

Prior to March 1, (the Universal Review Date), the supervisor will complete the evaluation document based on the employee’s performance for the entire year. Using the four levels of performance outlined below, job functions and objectives shall be rated on how well the employee has met the success criteria as outlined in the planning stage. Performance characteristics will be rated “acceptable” or “unacceptable” based on the definitions that were communicated to the employee in the planning stage. The characteristics shall be used as a communication tool and shall not be weighted in the determination of the overall performance rating.

Once the supervisor has completed the evaluation document, it will be presented to the reviewing officer for signature. The supervisor will then schedule a meeting with the employee to discuss his/her performance and to obtain the employee’s signature on the evaluation document. The evaluation must be completed prior to the review date to be timely.

FOUR LEVELS OF PERFORMANCE
(To rate job functions, objectives and overall performance)

E - Exceptional - Work that is consistently above the success criteria for the job throughout the rating period.

S - Successful - Work that meets the success criteria for the job.

I - Improvement Needed in the Performance Requirements - Work that barely or marginally meets success criteria (borderline).

U - Unsuccessful - Work that fails to meet the success criteria of the job.

NOTE: Performance characteristics will not be rated with the four levels of performance. They will be rated as “acceptable” (A) or “unacceptable” (U).