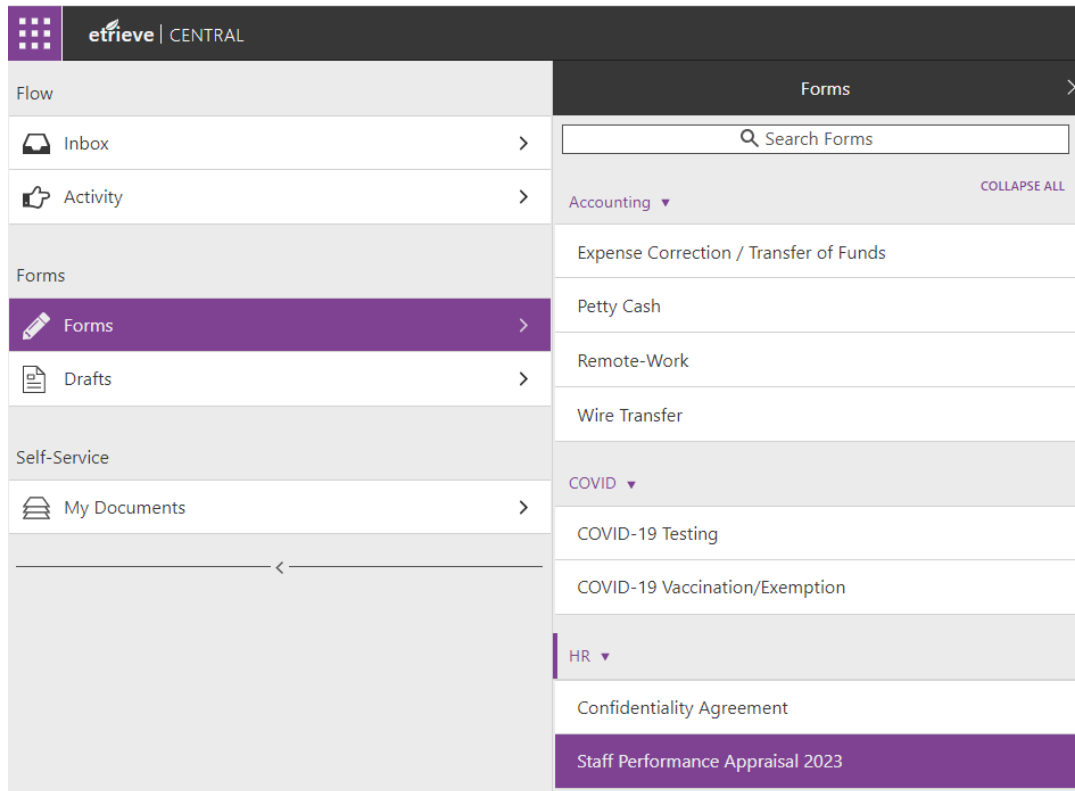


Supervisor Guide for Electronic Appraisal

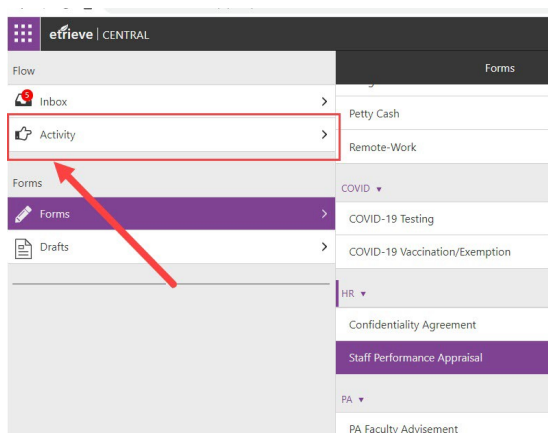
1.) The supervisor sends the staff member(s) an email requesting that a [self-appraisal](#) be completed. The Staff Performance Appraisal form in eDocs has been updated to include the self-appraisal for staff with faculty rank. The appropriate prompts will be displayed when the "yes" radio button is selected.

The supervisor further instructs the staff member(s) to complete, save (PDF format) and email as attachment(s) back to supervisor.

2.) The supervisor opens [eDocs](#) and selects "Staff Performance Appraisal 2023" from Forms.

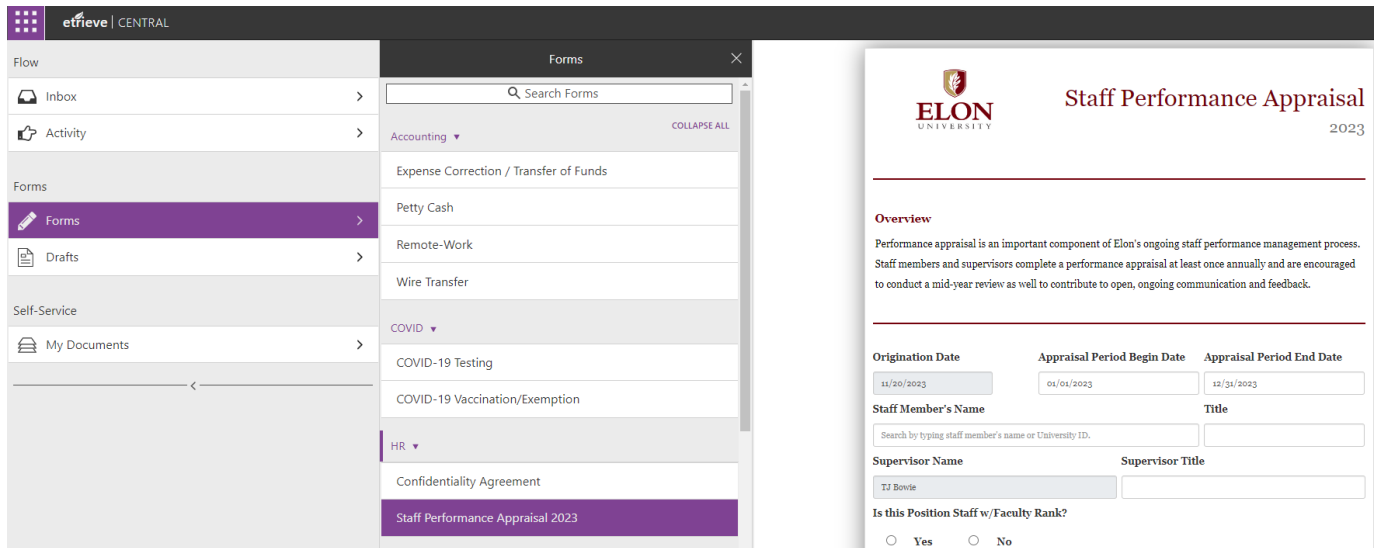


*Please note that a supervisor can access the appraisals for prior years (starting with 2020) by clicking on "Activity" on their landing page.



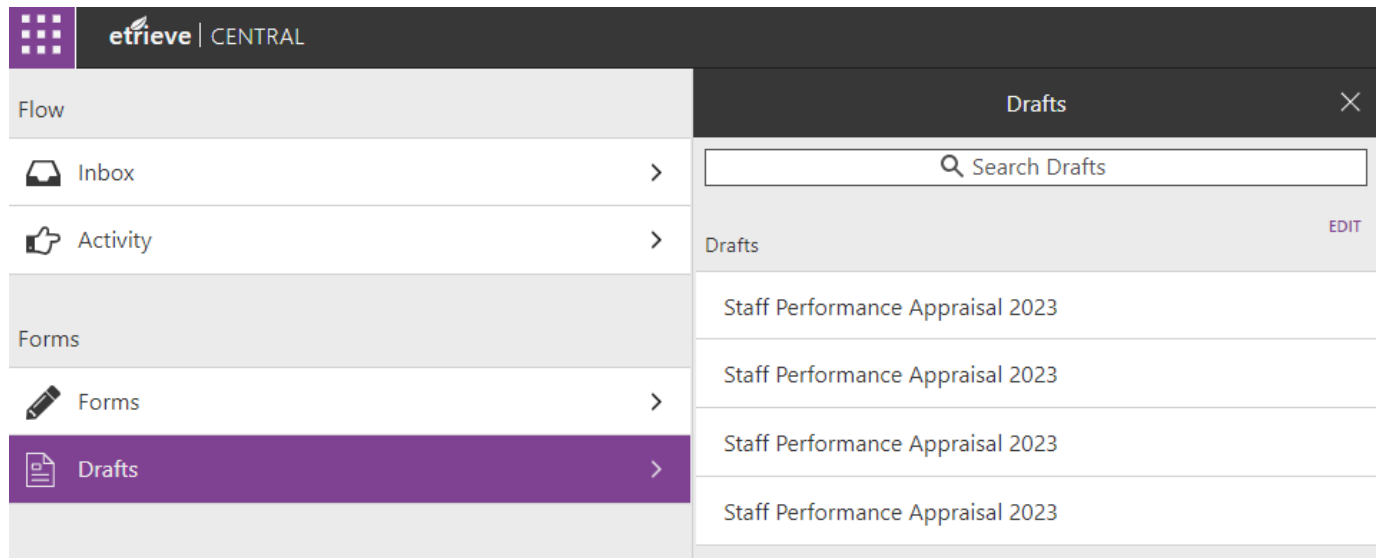
Supervisor Guide for Electronic Appraisal

3.) The eDoc “Staff Performance Appraisal” will load.



4.) On the form, the Origination Date will automatically populate (and adjust if saved and opened another day before submitting).

NOTE: If an appraisal is started and closed before clicking submit, the appraisal has automatically been saved in Drafts. The draft appraisal will appear but not with an identified name in the drafts folder.



In order to display a name, you will need to click on each draft Staff Performance Appraisal to load the appraisal in the view panel so that you can see the name of the employee on the selected appraisal.

Supervisor Guide for Electronic Appraisal

5.) The Appraisal Period Begin Date and Appraisal Period End Date will default to the appraisal calendar year, but may be edited if necessary, to correctly reflect the appraisal period.

Appraisal Period Begin Date **Appraisal Period End Date**

01/01/2023

12/31/2023

6.) In the “Staff Member’s Name” field, the supervisor will type the employee’s name which will begin to appear based on Colleague data. They will then type in the employee's Title.

7.) The Supervisor Name will auto populate, however you will need to type in your title.

Staff Member’s Name

Title

T.J. Bowie - 1695695

Supervisor Name

Supervisor Title

TJ Bowie

8.) Select the appropriate radio button for “Is this Position Staff w/Faculty Rank?”

If yes, appropriate prompts will appear further down the form to be used for the annual self-assessment. All text panes will resize to accommodate any volume of text. Staff with faculty rank may type directly into the text box or copy and paste text from another document.

Annual Self-Assessment

Prior to the meeting scheduled to discuss the performance appraisal with the supervisor, each Staff member with Faculty Rank and Administrator with Faculty Rank should formalize and submit to their supervisor an annual self-evaluation, commenting on the criteria listed below as appropriate.

I. Each Support Staff member with Faculty Rank and Administrator with Faculty Rank summarizes the activities and accomplishments of the prior calendar year. Each criterion for evaluation should be addressed, although one criterion is not given priority over another criterion. The list of indicators under a criterion is not intended to be a set of requirements, nor is the list exhaustive.

Activities and Accomplishments

Activities and accomplishments within the boundaries of his/her job description, including any changes to assigned duties.

Contributions to the Life of the University

Contributions to the university community reflect a commitment to the university and its mission and a willingness to be responsible for the life of the university. Activities that follow are sample indicators of involvement that may apply to support staff:

Supervisor Guide for Electronic Appraisal

9.) The supervisor will initiate the review sequence by typing their name in the appropriate box and selecting from the auto-populated options. This is required for the workflow. Start typing next level approvers and select from the auto-populated options, as necessary. The approval chain should include all supervisors through your Vice President.

*You must include someone in the VP/Provost/President box; for the majority of people this will be their VP; if you report to the Provost or President, include them, otherwise do not.

Supervisor's Name

Select next level Reviewer/Approver (optional) 1

Select next level Reviewer/Approver (optional) 2

Select next level Reviewer/Approver (optional) 3

Reviewing Dean's Name or Additional Approver (if appropriate)

Vice President/Provost/President

10.) The supervisor will review the self-appraisal, and complete the Competencies section by selecting a rating and providing a comment for each of the competencies.

Rating

Comments

11.) The goals section will import the goals submitted during the 2022 review process. If the employee did not receive a 2022 review, you may add pertinent goals and comments in the comments sections.

Goal/Responsibility #5

Completion

Comments #5

Supervisor Guide for Electronic Appraisal

12.) Select an Overall Rating (required) from the drop down and make appropriate comments in the text box Supervisor Comments. The Staff Member's Comments text box will allow the employee to make comments when they review and acknowledge.

Overall Rating

Please select an Overall Rating

Supervisor Comments

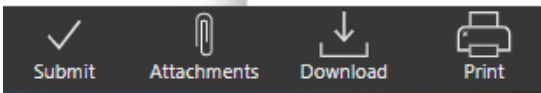
Staff Member's Comments

Acknowledgement

I have reviewed my performance appraisal and have had an opportunity to discuss it with my supervisor. My signature does not necessarily indicate that I agree with all aspects of my performance appraisal. I understand that I may comment on the appraisal on this form or submit additional comments within the next five working days to the Office of Human Resources.

13. The supervisor should attach the self-appraisal and then submit. Which will initiate an email the staff member letting them know their appraisal is available for review.

At the same time, the supervisor should schedule a meeting to discuss the review.



14. After the meeting if there are no edits needed to clarify staff member should select the acknowledge button which will initiate the return of the appraisal through the review sequence.

Each level of that review should also select acknowledge/approve and it will move along to the next step.

Once the VP/Provost/President approve, the appraisal will be complete and will be filed in EDocs where both the supervisor and staff member will have access under the activity tab.