

2016

Manager (Rater) Evaluates Employee

MANAGER (Rater)



STEP 1 – Enter the ratings for each Criteria

After completing the criteria, the Manager (Rater) will rate/evaluate the employee at the end of the rating period.

NOTE: It is important that a supervisor or manager identify and communicate clear job performance expectations to the employee at the beginning of the rating period. The supervisor, (i.e., the Manager (Rater)) will use those job performance criteria to evaluate the employee.

1. Manager (Rater) navigates to: [myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents](#).
2. Click the [Document Type](#) hyperlink for the listed employee.

Current Performance Documents						
Listed below are the current performance documents for which you are the Manager.						
Performance Documents						
Employee	Document Type	Begin Date	End Date	Job Title	Status	
DIEDRE Ferris	ANNUAL REVIEW	11/12/2012	12/31/2012	Customer Service Assistant 1	In Progress	

3. Click the [Start](#) hyperlink next to the **Complete Manager Evaluation** step.

Current Performance Documents

Document Details

Human Capital Management Mgr
ANNUAL REVIEW: 01/01/2013 - 01/01/2014

You have successfully completed the Establish Criteria step.

Performance Document Details			
Employee:	ANNUAL REVIEW	Job Title:	Human Capital Management Mgr
Document Type:	ANNUAL REVIEW	Period:	01/01/2013 - 01/01/2014
Template:	ANNUAL PERFORMANCE REVIEW	Document ID:	23665
Manager:		Status:	In Progress

Document Progress				
Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✓ Completed	03/02/2013	View	
Nominate Participants	○ Not Started	12/02/2013		Start
Track Nominations	○ Not Started	12/02/2013		
Review Participant Evaluations	○ Not Started	12/02/2013		
Review Self Evaluation	○ Not Started	12/02/2013		
Complete Manager Evaluation	○ Not Started	12/17/2013		Start

[Return to Select Documents](#)



- 4. For each of the applicable sections (those that have established Criteria), enter ratings and comments.

Section 3 - AGENCY COMPETENCIES

[Expand](#) [Collapse](#)

COMMUNICATE SPV/PEERS/SUBS

Description : Provides information to supervisors, coworkers (peers), and subordinates (staff) by telephone, in written form (electronic or hard copy), or in person.

[+ Select Job Level](#)

1. Does Not Meet 2. Meets Expectations 3. Exceeds Expectations

Rating:

Comments:

[Writing Tools](#)

NOTE: Throughout the evaluation process, entries made on the evaluation can be saved by clicking the **Save** button. Do not click the **Save and Submit** button until the ratings are complete and the evaluation is ready for approval.

Using the Writing Tools

Writing Tools [Writing Tools](#)

When writing an evaluation, comments are expected. As a Supervisor (i.e., the Manager (Rater)), you will want to make sure that you are adding comments in an appropriate manner. The **Writing Tools** functionality helps by providing suggestions for text that can be incorporated into the comments of an evaluation document.

1. Click the rating your employee has achieved on the **Job Level Rating Scale** and then click the **Writing Tools** hyperlink.

The screenshot displays a web interface for evaluating an employee. It features a blue header bar with the text "GENERAL PHYSICAL ACTIVITIES". Below this, a description is provided: "Description : Performing physical activities that require considerable use of your arms and legs and moving your whole body, such as climbing, lifting, balancing, walking, stopping, and handling of materials." A trash icon is visible to the right of the description. The main content area is titled "INDIVIDUAL CONTRIBUTOR" and includes a description of the job level: "Individual Contributor level positions are assigned specialized functions or programs. Employees may be in a Bargaining Unit or Exempt classification. Scope of work activities may include: * Providing guidance, consultation or expert advice in specialized technical or professional area(s) * Remaining current in area of expertise/body of knowledge * Monitoring, maintaining and/or inspecting assigned persons, programs or equipment * Recommending and influencing standard practices and process improvements". Below this, there are three radio button options for rating: "1. Does Not Meet", "2. Meets Expectations" (which is selected and highlighted with a red box), and "3. Exceeds Expectations". A "Rating:" label is positioned to the left of these options. Below the rating options, there is a "+ Select Job Level" button. At the bottom of the form, there are three radio button options for rating: "1. Does Not Meet", "2. Meets Expectations", and "3. Exceeds Expectations". A "Rating:" label is positioned to the left of these options. At the bottom left, there is a "Comments:" label and a text input field. A "Writing Tools" hyperlink is highlighted with a red box next to the "Comments:" label.

Using the Writing Tools *continued*

- A list of suggestions populates based upon the competency you are rating and the rating level you selected. The list contains suggestions labeled **Development Tips** and **Results Writer**. You can sort the source of the suggestions by clicking on the **Source** heading.

Performance Document - ANNUAL REVIEW

Writing Tools - Suggested Results

Suggested Results		
		Customize View All First 1-9 of 9 Last
Suggested Results Text▲	Source▲	
<input type="checkbox"/> Enhance knowledge/skill through the use of Union Benefit Trust (UBT) funds or Employee Development Funds (EDF), as appropriate.	Development Tips	
<input type="checkbox"/> Identify and complete course(s) via DAS, Human Resource Division, Office of Learning and Professional Development CORE Program.	Development Tips	
<input type="checkbox"/> Identify and participate in training offered at the agency for customer service improvements.	Development Tips	
<input type="checkbox"/> Demonstrates the required flexibility and endurance to meet the minimal standards in terms of achieving unusual postural positions such as kneeling, bending, or lying down in order to complete tasks at acceptable rates of speed and under routine conditions.	Results Writer	
<input type="checkbox"/> Is able to deal with short-term exposure to non-routine or potentially hazardous working conditions such as cold, heat, noise, or possible communicable diseases, and completes tasks under such conditions with acceptable rates of speed and precision.	Results Writer	
<input type="checkbox"/> Is able to defend self and others from physical attack, resulting in limited physical damage to self and others being attacked.	Results Writer	
<input type="checkbox"/> Lifts, pulls, pushes, or maneuvers the minimum amount of weight required for the performance of tasks at acceptable rates of speed and precision and under routine conditions.	Results Writer	
<input type="checkbox"/> Provides insight into possible measures to protect staff and customers from unsafe conditions when engaging in physical activities.	Results Writer	
<input type="checkbox"/> Uses caution and behaves in a safe manner when performing physical activities, and accounts for and/or removes hazards and obstacles before engaging in physical activities.	Results Writer	

Using the Writing Tools *continued*

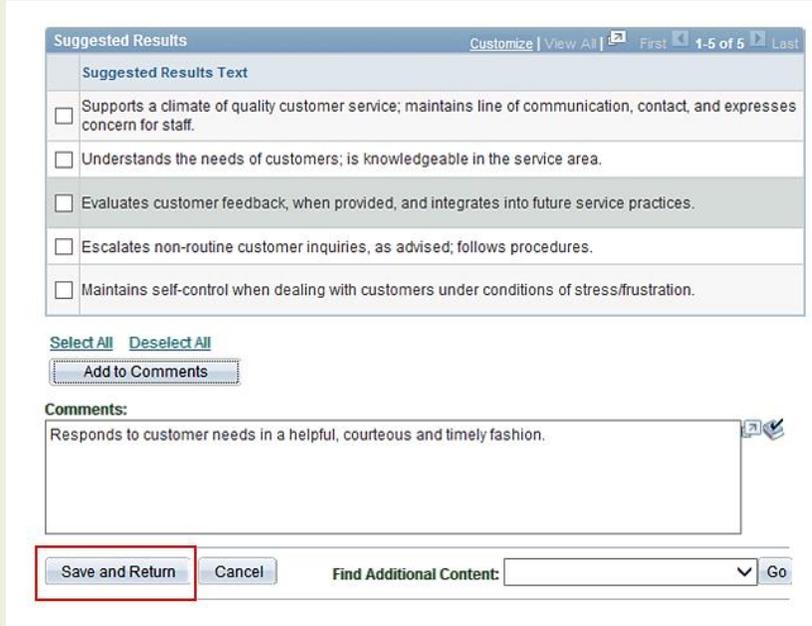
3. Select as many **Suggested Results Text** options as needed by clicking the applicable checkboxes and then clicking the **Add to Comments** button.

Suggested Results		Customize View All  First 1-9 of 9 Last
<input type="checkbox"/>	Suggested Results Text	Source
<input checked="" type="checkbox"/>	Uses caution and behaves in a safe manner when performing physical activities, and accounts for and/or removes hazards and obstacles before engaging in physical activities.	Results Writer
<input type="checkbox"/>	Provides insight into possible measures to protect staff and customers from unsafe conditions when engaging in physical activities.	Results Writer
<input checked="" type="checkbox"/>	Lifts, pulls, pushes, or maneuvers the minimum amount of weight required for the performance of tasks at acceptable rates of speed and precision and under routine conditions.	Results Writer
<input type="checkbox"/>	Is able to defend self and others from physical attack, resulting in limited physical damage to self and others being attacked.	Results Writer
<input type="checkbox"/>	Is able to deal with short-term exposure to non-routine or potentially hazardous working conditions such as cold, heat, noise, or possible communicable diseases, and completes tasks under such conditions with acceptable rates of speed and precision.	Results Writer
<input type="checkbox"/>	Demonstrates the required flexibility and endurance to meet the minimal standards in terms of achieving unusual postural positions such as kneeling, bending, or lying down in order to complete tasks at acceptable rates of speed and under routine conditions.	Results Writer
<input type="checkbox"/>	Identify and participate in training offered at the agency for customer service improvements.	Development Tips
<input type="checkbox"/>	Identify and complete course(s) via DAS, Human Resource Division, Office of Learning and Professional Development CORE Program.	Development Tips
<input type="checkbox"/>	Enhance knowledge/skill through the use of Union Benefit Trust (UBT) funds or Employee Development Funds (EDF), as appropriate.	Development Tips

[Select All](#) [Deselect All](#)

Using the Writing Tools *continued*

4. Notice the text is now in the **Comments** box. You can edit or add more to the **Comments** at this point or after you return to the evaluation screen. Once you are finished editing the comments, click the **Save and Return** button.



The screenshot shows a web interface for 'Suggested Results'. At the top, there are navigation links: 'Customize | View All | First 1-5 of 5 Last'. Below this is a table with the following rows:

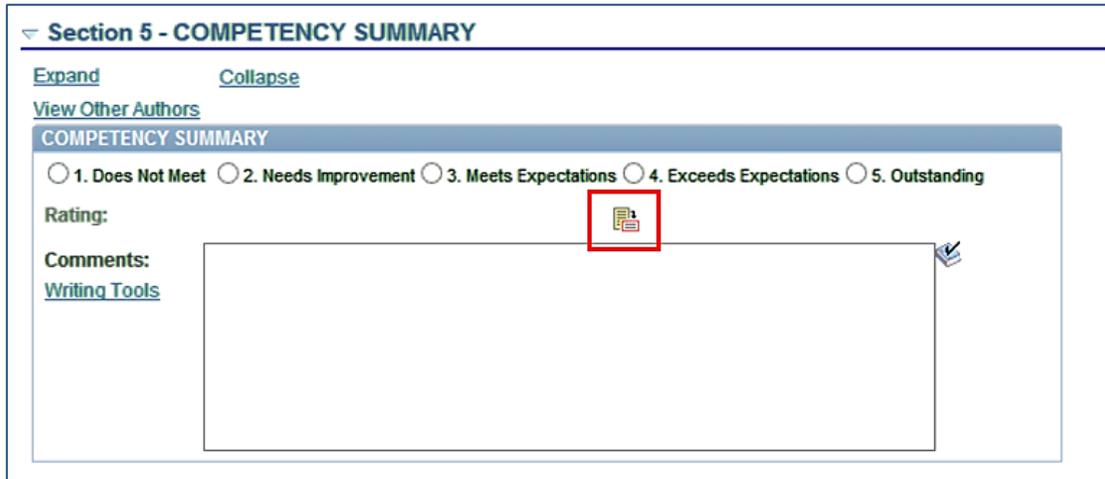
Suggested Results Text	
<input type="checkbox"/>	Supports a climate of quality customer service; maintains line of communication, contact, and expresses concern for staff.
<input type="checkbox"/>	Understands the needs of customers; is knowledgeable in the service area.
<input type="checkbox"/>	Evaluates customer feedback, when provided, and integrates into future service practices.
<input type="checkbox"/>	Escalates non-routine customer inquiries, as advised; follows procedures.
<input type="checkbox"/>	Maintains self-control when dealing with customers under conditions of stress/frustration.

Below the table are links for 'Select All' and 'Deselect All', followed by an 'Add to Comments' button. Underneath is a 'Comments:' section with a text area containing the text: 'Responds to customer needs in a helpful, courteous and timely fashion.' At the bottom, there is a 'Save and Return' button (highlighted with a red box), a 'Cancel' button, and a 'Find Additional Content:' search bar with a 'Go' button.

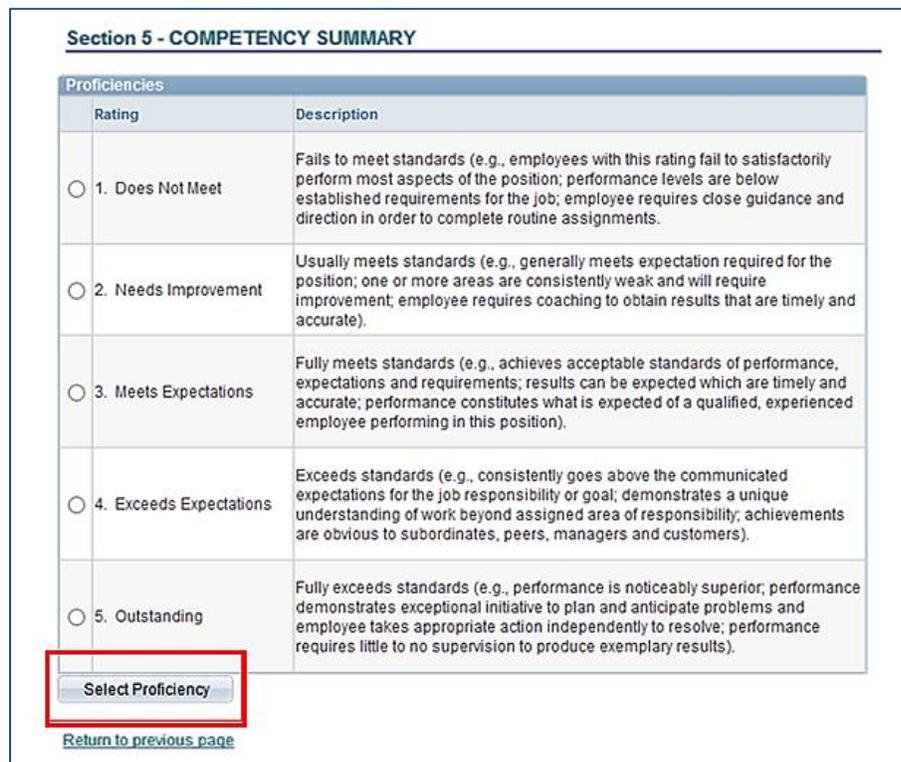
The text selected on the **Writing Tools** page is now inserted into the **Comments** section.

STEP 2 – Overall Competency Rating

After each Competency has been evaluated, the Rater is asked to provide an Overall Competency Summary rating. Instead of a 3 point scale, the Competency Summary rating is based on a 5 point scale. The rating can be selected on this screen or by clicking the Rating Description Icon to view descriptions of the scale.



1. Click the **Rating** radio button next to the appropriate **Rating and Description** and click the **Select Proficiency** button at the bottom of the page.



Proficiencies	
Rating	Description
<input type="radio"/> 1. Does Not Meet	Fails to meet standards (e.g., employees with this rating fail to satisfactorily perform most aspects of the position; performance levels are below established requirements for the job; employee requires close guidance and direction in order to complete routine assignments).
<input type="radio"/> 2. Needs Improvement	Usually meets standards (e.g., generally meets expectation required for the position; one or more areas are consistently weak and will require improvement; employee requires coaching to obtain results that are timely and accurate).
<input type="radio"/> 3. Meets Expectations	Fully meets standards (e.g., achieves acceptable standards of performance, expectations and requirements; results can be expected which are timely and accurate; performance constitutes what is expected of a qualified, experienced employee performing in this position).
<input type="radio"/> 4. Exceeds Expectations	Exceeds standards (e.g., consistently goes above the communicated expectations for the job responsibility or goal; demonstrates a unique understanding of work beyond assigned area of responsibility; achievements are obvious to subordinates, peers, managers and customers).
<input type="radio"/> 5. Outstanding	Fully exceeds standards (e.g., performance is noticeably superior; performance demonstrates exceptional initiative to plan and anticipate problems and employee takes appropriate action independently to resolve; performance requires little to no supervision to produce exemplary results).

Select Proficiency

[Return to previous page](#)

STEP 3 – Goals and Performance Expectations

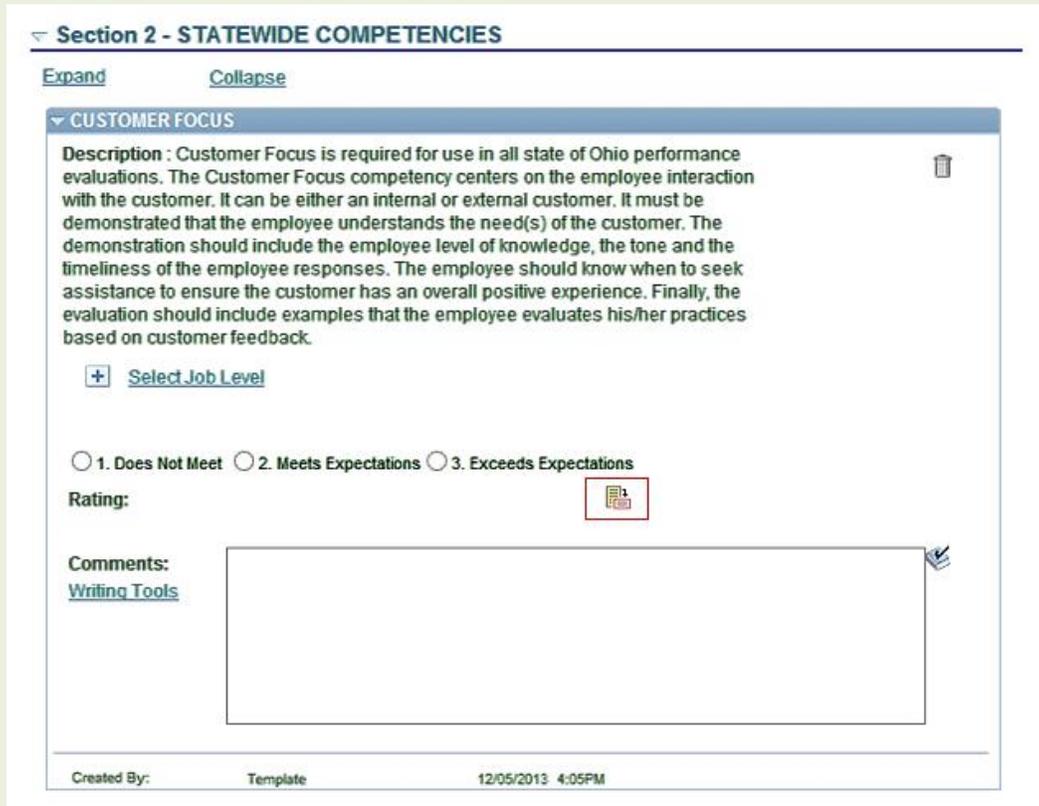
The Manager (Rater) will then evaluate the Employee’s Goals and Performance Expectations. The rating scale for Goals and Performance Expectations is the same used to rate Competencies. After each Goal has been evaluated, the Manager (Rater) is asked to provide a Goals and Performance Expectations Summary rating. This scale is the same used to rate the Competency Summary.

Using the Rating Description Icon

Rating Description Icon

When completing an evaluation, the Manager (Rater) may need assistance in determining the meaning behind each rating in the rating scale. The Rating Description Icon will allow the Manager (Rater) to view descriptions of the scale.

1. Click the [Rating Description](#) icon.



The screenshot shows a web interface for 'Section 2 - STATEWIDE COMPETENCIES'. It includes an 'Expand' button and a 'Collapse' button. A dropdown menu is open for 'CUSTOMER FOCUS', displaying a detailed description of the competency. Below the description is a 'Select Job Level' button and three radio button options: '1. Does Not Meet', '2. Meets Expectations', and '3. Exceeds Expectations'. A 'Rating:' label is positioned next to a red-bordered icon representing the Rating Description icon. Below this is a 'Comments:' section with a 'Writing Tools' link and a large text input area. At the bottom, it shows 'Created By: Template' and the date '12/05/2013 4:05PM'.

Using the Rating Description Icon *continued*

- Click the **Rating** radio button next to the appropriate Rating and Description.

Proficiencies	
Rating	Description
<input type="radio"/> 1. Does Not Meet	Fails to meet standards (e.g., employees with this rating fail to satisfactorily perform most aspects of the position, performance levels are below established requirements for the job, employee requires close guidance and direction in order to complete routine assignments).
<input type="radio"/> 2. Meets Expectations	Fully meets standards (e.g., achieves acceptable standards of performance, expectations and requirements, results can be expected which are timely and accurate, performance constitutes what is expected of a qualified, experienced employee performing in this position).
<input type="radio"/> 3. Exceeds Expectations	Exceeds standards (e.g., consistently goes above the communicated expectations of the job responsibility or goal, demonstrates a unique understanding of work beyond assigned area of responsibility, achievements are obvious to subordinates, peers, managers and customers).

Select Proficiency

- Click the **Select Proficiency** button at the bottom of the page.
- The rating is now chosen for the Section. In the illustration below, the rating “Meets Expectations” was chosen for the Statewide Competency.

Section 2 - STATEWIDE COMPETENCIES

[Expand](#) [Collapse](#)

CUSTOMER FOCUS

Description : Customer Focus is required for use in all state of Ohio performance evaluations. The Customer Focus competency centers on the employee interaction with the customer. It can be either an internal or external customer. It must be demonstrated that the employee understands the need(s) of the customer. The demonstration should include the employee level of knowledge, the tone and the timeliness of the employee responses. The employee should know when to seek assistance to ensure the customer has an overall positive experience. Finally, the evaluation should include examples that the employee evaluates his/her practices based on customer feedback.

[+](#) Select Job Level

1. Does Not Meet 2. Meets Expectations 3. Exceeds Expectations

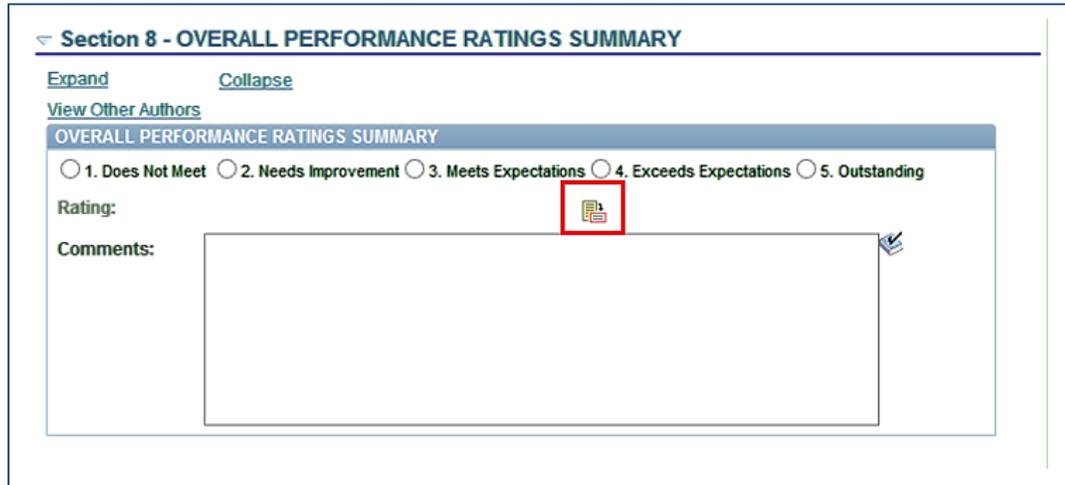
Rating: 2. Meets Expectations

Comments: [Writing Tools](#)

Created By: Template 12/05/2013 4:05PM

STEP 4 – Overall Performance Ratings Summary

In the final rating section, the Manager (Rater) is asked to provide an Overall Performance Rating for the Employee. As with the previous summary ratings (Competencies as well as Goals and Performance Expectations), this rating is based on a 5 point scale and the Rating Description Icon will allow Raters to view descriptions of the scale.



Section 8 - OVERALL PERFORMANCE RATINGS SUMMARY

Expand Collapse

View Other Authors

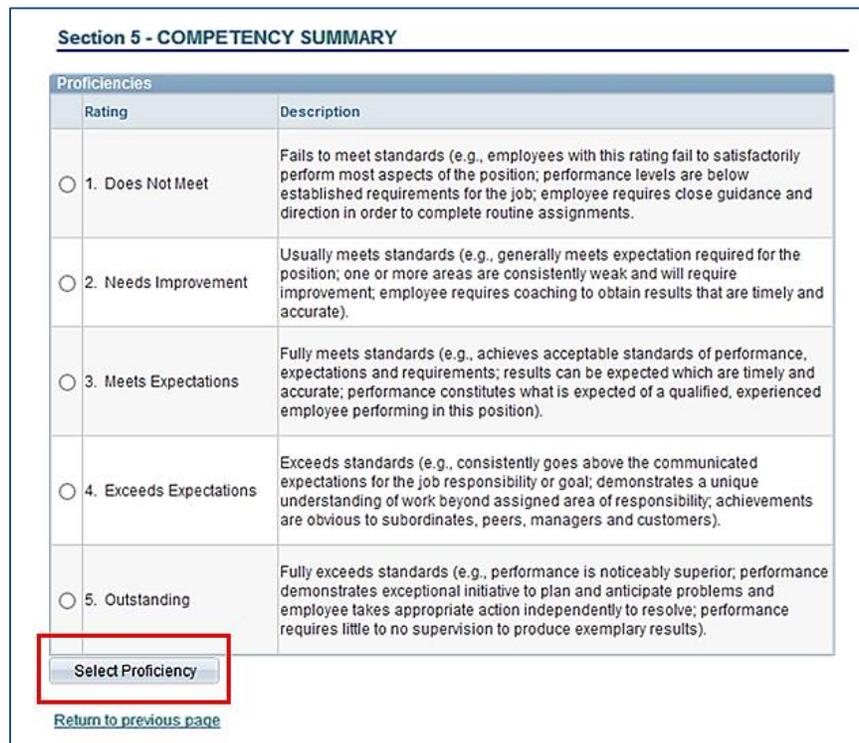
OVERALL PERFORMANCE RATINGS SUMMARY

1. Does Not Meet
 2. Needs Improvement
 3. Meets Expectations
 4. Exceeds Expectations
 5. Outstanding

Rating: 

Comments:

1. Click the **Rating** radio button next to the appropriate Rating and Description and click the **Select Proficiency** button at the bottom of the page.



Section 5 - COMPETENCY SUMMARY

Proficiencies	
Rating	Description
<input type="radio"/> 1. Does Not Meet	Fails to meet standards (e.g., employees with this rating fail to satisfactorily perform most aspects of the position; performance levels are below established requirements for the job; employee requires close guidance and direction in order to complete routine assignments).
<input type="radio"/> 2. Needs Improvement	Usually meets standards (e.g., generally meets expectation required for the position; one or more areas are consistently weak and will require improvement; employee requires coaching to obtain results that are timely and accurate).
<input type="radio"/> 3. Meets Expectations	Fully meets standards (e.g., achieves acceptable standards of performance, expectations and requirements; results can be expected which are timely and accurate; performance constitutes what is expected of a qualified, experienced employee performing in this position).
<input type="radio"/> 4. Exceeds Expectations	Exceeds standards (e.g., consistently goes above the communicated expectations for the job responsibility or goal; demonstrates a unique understanding of work beyond assigned area of responsibility; achievements are obvious to subordinates, peers, managers and customers).
<input type="radio"/> 5. Outstanding	Fully exceeds standards (e.g., performance is noticeably superior; performance demonstrates exceptional initiative to plan and anticipate problems and employee takes appropriate action independently to resolve; performance requires little to no supervision to produce exemplary results).

Select Proficiency

[Return to previous page](#)

Using the Check Language Option

Check Language Button

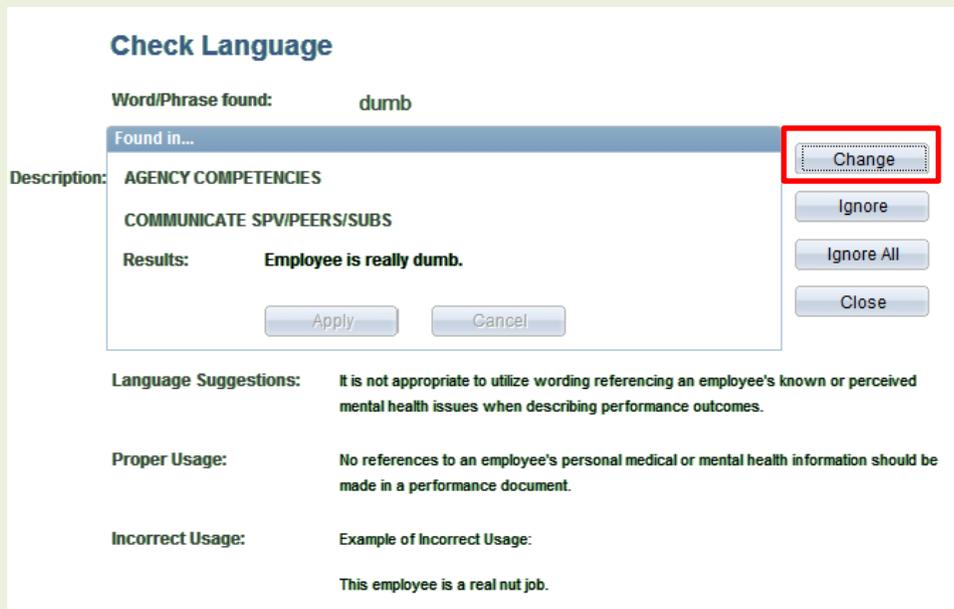


Check Language catches words or phrases that are deemed inappropriate to be included in a performance document.

1. Click the “**Check Language**” button.

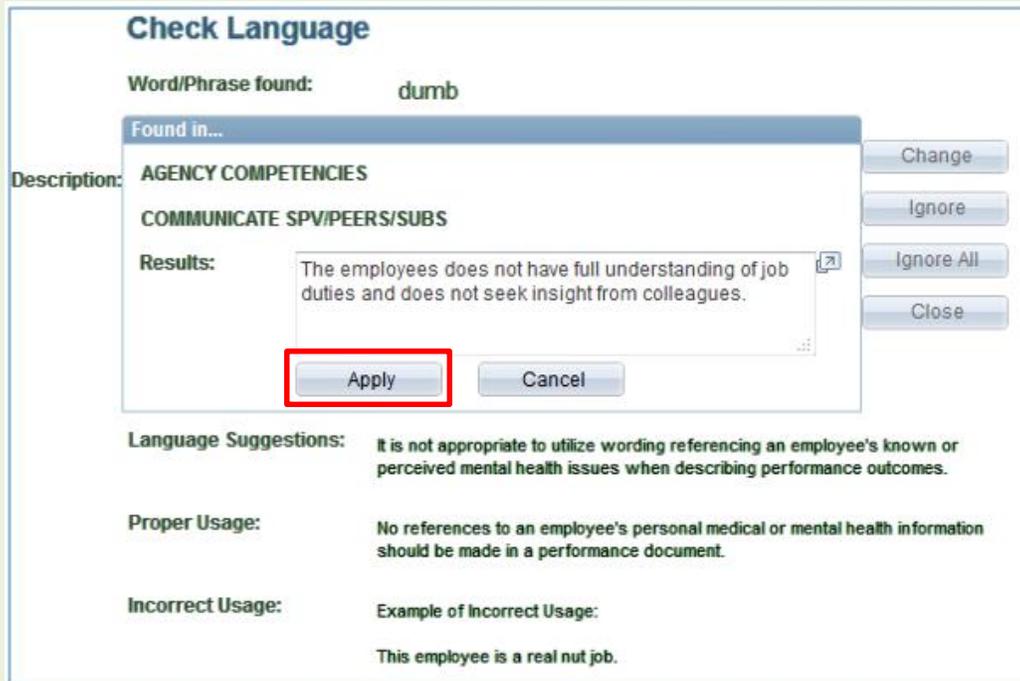


2. The Language Checker is scanning the page. If any inappropriate language is found, it will show you on the screen along with some alternative suggestions. Click the **Change** button to adjust the original wording.



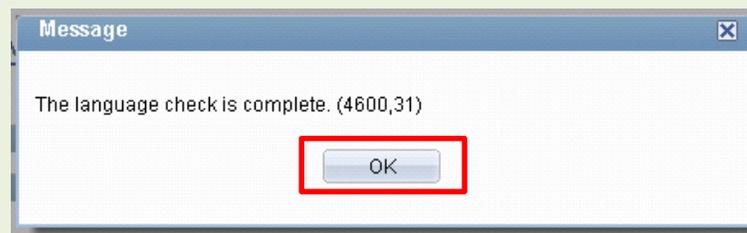
Using the Check Language Option *continued*

3. Type a more appropriate alternative. Click the **Apply** button.



NOTE: The language checker is NOT all inclusive, but rather a helpful tool. Manager (Raters) and Manager (Reviewers) are still required to review the document for appropriate language usage. The language checker will be updated on a regular basis as additional language editing requirements are identified.

4. Click the **OK** button.



STEP 5 – Additional Documentation Confirmation

Section 9 (Additional Documentation Confirmation) asks the Manager (Rater) if a Career Development Plan (CDP) or Performance Improvement Plan (PIP) has been generated for the employee. A CDP is **optional** and can be created when a Supervisor **or** Employee identifies Education, Experience, Licensure, and/or Certification suggested for Career Development along with personal learning goals and developmental objectives.

A PIP is **required** if an Employee is rated below “Meets Expectations” in Section 8 (Overall Performance Ratings Summary). No rating is given for either document at this time, only confirmation of their creation. These documents are accessed separately from the Performance Document.

1. Click the appropriate radio button for each document type before continuing.

Section 9 - ADDITIONAL DOCUMENTATION CONFIRMATION

Expand Collapse

CAREER DEVELOPMENT PLAN CONFIRMATION

Description : Has a Career Development Plan been generated for the rated employee?

No Yes

Rating:

Comments:

Created By: Template 12/05/2013 4:05PM

PERFORMANCE PLAN CONFIRMATION

Description : Has a Performance Improvement Plan (PIP) been generated for the rated employee?

No Yes

Rating:

Comments:

Created By: Template 12/05/2013 4:05PM

STEP 6 – Manager (Rater) Comments

Section 11 - Manager (Rater) Comments are optional and allow the Manager (Rater) an opportunity to provide additional input regarding the employee’s work performance.

Section 11 - MANAGER RATER COMMENTS SECTION

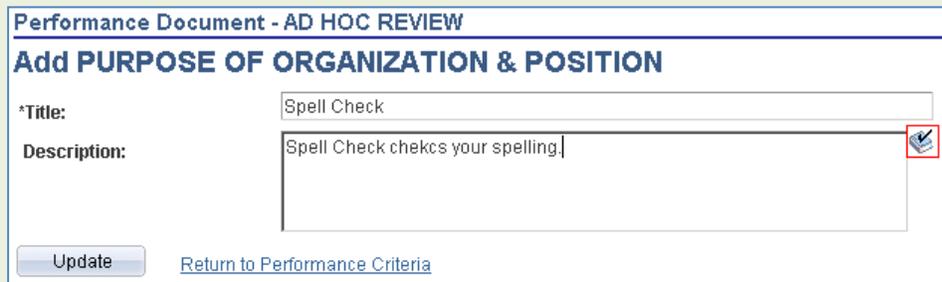
Employee assisted the team by taking on additional responsibilities during our busy field season. 

Using Spell Check

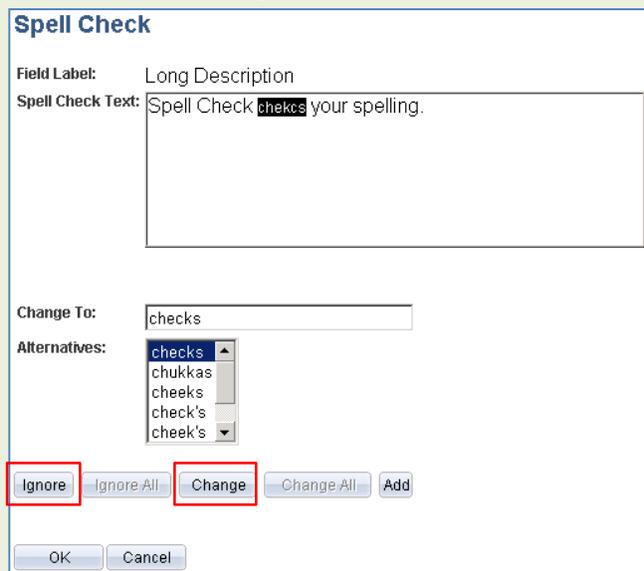
Spell Check Icon

Wherever the Spell Check icon is displayed, it means that spell check is available to be used for the verbiage that is entered in the associated text box. Follow the steps below to use the spell check functionality.

1. Once you have completed entering the appropriate text in a text box, click the **Spell Check** icon.

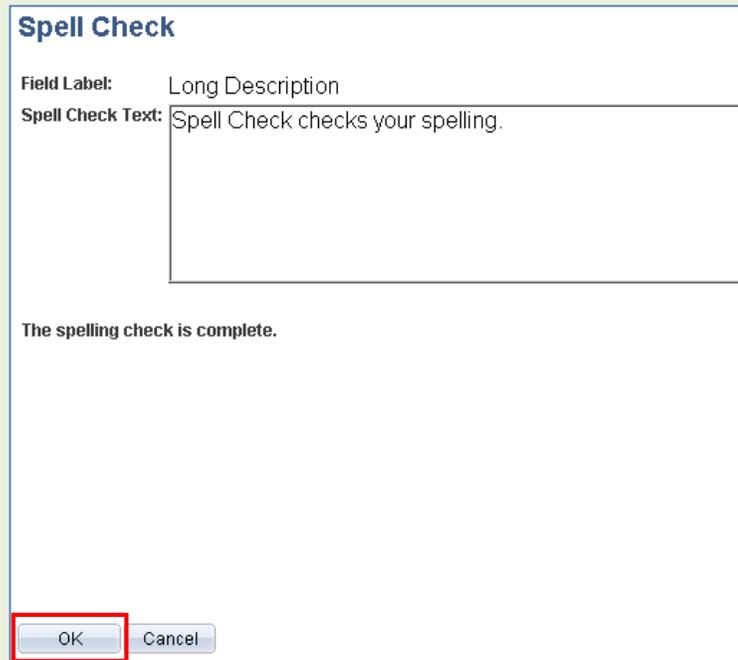


2. Spell Check will highlight possible misspelled words. Click the correct spelling from the **Alternatives** box and click the **Change** button.
 - a. Click the **Ignore** button if the highlighted spelling in the **Spell Check Text** is correct and does not need to be changed.
 - b. If the correct spelling is not available in the **Alternatives** box, type the correct spelling in the **Change To** field and click the **Change** button.



Using Spell Check *continued*

- Once all words have been spell checked, Spell Check will indicate that spelling check is complete: **“The spelling check is complete.”** Click the **OK** button and the Spell Check functionality will exit automatically.



Spell Check

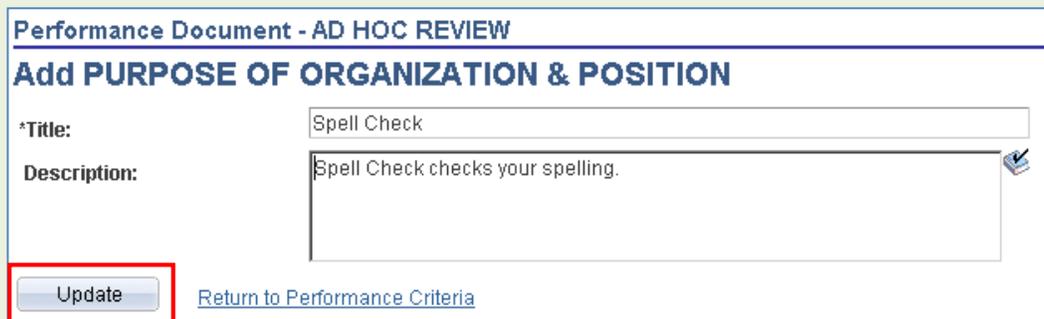
Field Label: Long Description

Spell Check Text: Spell Check checks your spelling.

The spelling check is complete.

OK Cancel

- Click the **Update** button and continue the evaluation.



Performance Document - AD HOC REVIEW

Add PURPOSE OF ORGANIZATION & POSITION

*Title: Spell Check

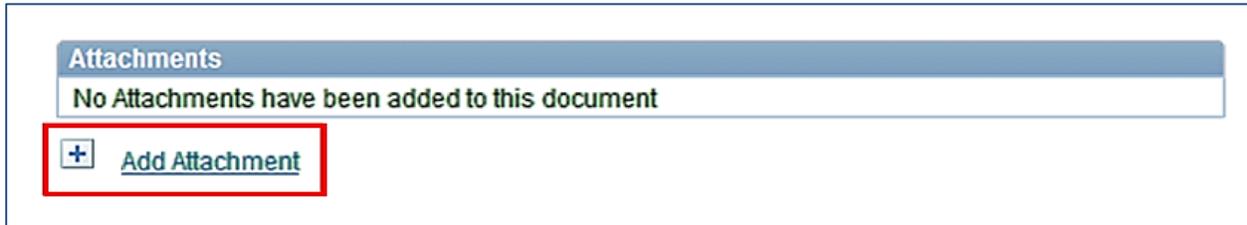
Description: Spell Check checks your spelling.

Update [Return to Performance Criteria](#)

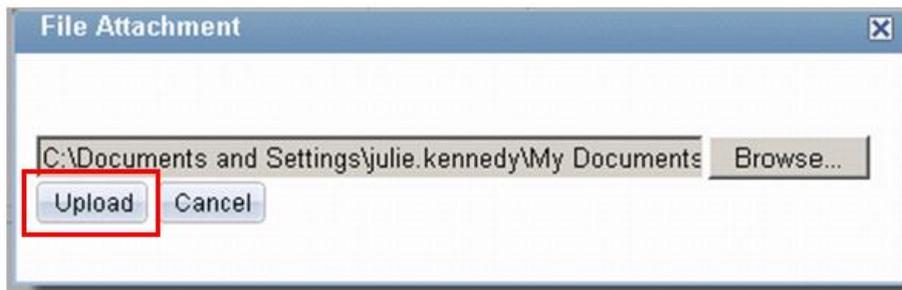
STEP 7 – Attachments

The Manager (Rater) has the option of attaching additional documentation to support the evaluation. Examples of appropriate documentation include: position descriptions, work product files, certificates, awards, etc. Inappropriate documents may include medical records or diagnoses.

1. Click the **Add Attachment** hyperlink.



2. Click the **Browse** button and locate the file to be uploaded. Click the **Upload** button.



3. Enter a description of the document and choose the **Attachment Audience**.



4. Click the **Save** button. The document has been saved, but has not advanced to the approval phase.

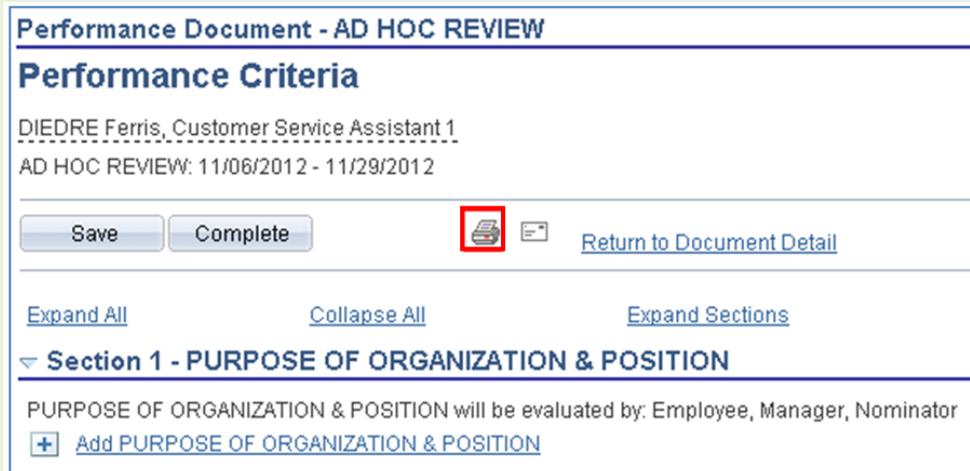
NOTE: Attachment Audience refers to who has access to view the attachment. The **Mgr Only** option will still allow every Manager/ePerformance Administrator in the approval chain to view the attached document. The **EE and Mgr** option allows the management approval chain and the employee access. If *no selection* is indicated, the Employee will not have access to the uploaded document.

Using the Print Icon

Print Icon / Viewing a Printable Version

Anytime there is a printer icon, the page can be displayed in a printable format. For this example, a printable version of an evaluation will be illustrated.

1. Click the **Printer** icon.



2. Another window is opened with a printer friendly version of the page, as illustrated below. The page can be printed by clicking the Internet browser's printer button.

