

# Supervisor Role

## Performance Evaluation Process

- Supervisor ■ Employee
- ● Supervisor and Employee meet to establish performance criteria.
- Supervisor Creates the Performance Document.
- Supervisor enters Performance Criteria.
- Employee can view criteria .
- Supervisor monitors employee progress, makes revisions, documents progress, etc.
- Supervisor evaluates employee performance on the Performance Review (occurs at the end of the period).
- Supervisor Submits Evaluation for Approval.
  - Reviewer (Manager) reviews the evaluation and Approves/Denies.
  - ePerformance Administrator reviews the evaluation and Approves/Denies.
  - Designated Appointing Authority reviews the evaluation and Approves/Denies.
- ● Supervisor makes the evaluation "Available for Review".
- Employee can review / comment.
- ● Supervisor conducts face-to-face evaluation with employee and updates the "Status" of the Performance Document to "Review Held."
- Employee logs into myOhio to acknowledge the document.
- Supervisor completes the evaluation by updating the Status to "Complete".
- If the Employee's overall rating is less than "Meets Expectations," a Performance Improvement Plan (PIP) will need to be initiated.

### Create Performance Evaluation

- Access screen: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Create Documents.
- Click the appropriate employee's Select box.
- Click the "Continue" button.
- Enter the evaluation period "Begin" and "End" dates.
- Select the Document Type: Probationary, Annual, and Ad hoc.
- Select the appropriate "Template" from the dropdown list.
- Click the "Create Documents" button.

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### Enter Employee Performance Criteria

- Access screen: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents.
- Next to the employee's name, click the appropriate "Document Type" hyperlink, such as: Annual, Ad Hoc, or Probationary.
- Click the "Start" link for Establish Evaluation Criteria step.
- Enter the evaluation data for the employee for the following sections by selecting the "+" button:
  - Section 1: Purpose of Organization; Section 3: Agency Competencies; Section 6: Goals & Performance Expectations.
- Once all criteria is entered, click the "Complete" button.  
Note: If not complete, click the "Save" button to finish your work later.
- Click the "Complete" button again.

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### Monitor: Revise, Document/Record, Attach

- Access screen: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents.
- Next to the employee's name, click the appropriate "Document Type" hyperlink, such as: Annual, Ad Hoc, or Probationary.
- Click the "Edit" link.
- Enter the appropriate comments in the following sections:
  - Section 1: Purpose of Organization; Section 2: Statewide Competencies; Section 3: Agency Competencies; Section 4: Classification Competencies; and Section 6: Goals & Performance Expectations.
- Once all comments are entered, click the "Save" button.

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### Evaluate Performance & Submit for Approval

- Access screen: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents.
- Next to the employee's name, click the appropriate "Document Type" hyperlink, such as: Probationary, Annual, and Ad hoc.
- Rate the Employee in all sections, including summary sections.
- Once all ratings are entered, click the "Submit for Approval" button, or click the "Save" button to submit at a later time.

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### Available for Review

- Once all approvals have been processed, manager navigates to: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents.
- Find the appropriate employee's document and click the "Available for Review" hyperlink.
- Click the "Available for Review" button, and then click "OK" to confirm.

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### Mark Review Held

- Manager and Employee conduct face-to-face evaluation.
- Manager Navigates to: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents.
- Find the appropriate employee's document, and click the "Mark Review Held" hyperlink.
- Click the "Review Held" button and then "OK" to confirm.

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### Manager Completes Evaluation

- Access screen: myOhio > Career Resources > Manager Tasks > ePerformance Performance Docs > Current Documents.
- Click the appropriate employee's document.
- Click the "Complete" hyperlink next to the Complete Manager Evaluation Step.
- Click the "Complete" button and then click "OK" to confirm.

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### Performance Improvement Plan (PIP)

- Access screen: myOhio > Career Resources > Manager Tasks > ePerformance Development Documents > Create Documents.
- Enter Development Document info for the employee.
- Click Create Documents.

All

# Rating Models

- Does Not Meet
- Meets Expectations
- Exceeds Expectations

**A**

### Used when rating:

- Statewide, Agency & Classification Competencies
- Goals & Performance Expectation Rating

- Does Not Meet
- Needs Improvement
- Meets Expectations
- Exceeds Expectations
- Outstanding

**B**

### Used when rating:

- Summation of Competencies and Goals & Objectives
- Overall Performance Evaluation Rating

## EVALUATION TYPES

- **Probationary performance reviews** will be conducted for all new hires and employees promoted into a new position, and may have a three, six, or twelve month review cycle. This type is also used for probationary period extensions.
- **Annual performance reviews** for exempt employees will be based on a universal review date selected by your agency. Bargaining unit employees' annual review cycles are established based on contractual language in respective union contracts.
- **Ad hoc performance reviews** will be conducted in conjunction with a Performance Improvement Plan (PIP) or other related special circumstances with no defined cycle period.

## EMPLOYEE DEVELOPMENT PLAN

Career Development documents are optional within ePerformance and can be initiated by either an employee or a supervisor.

## NEED ASSISTANCE?

**Statewide Program Support:**  
DAS, Human Resources Division  
Office of Talent Management

[ePerformance@das.ohio.gov](mailto:ePerformance@das.ohio.gov)  
Phone: 1-800-409-1205, prompt #6  
<http://das.ohio.gov/ePerfToolkit>

# Rating Definitions

**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).

**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).

**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).

**NEEDS IMPROVEMENT** - Usually meets standards (e.g., generally meets expectations 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).

**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).

## Employees without Computers

If your employee does not have access to a computer, he/she can still be actively involved in the performance management process. The employee can sit with you at your computer and make changes together. Another option is to work from a printed/hard copy of the performance document.

### Steps 1 – 3 Establishing Evaluation Criteria

During the planning stage, you can provide a copy of your employee's performance plan and the employee can write comments and ideas on the hard copy. Together you and your employee will set the evaluation criteria. You will enter the plan into the system.

### Steps 4 & 7 – Review, Comment, and Acknowledge

The employee will have an opportunity to view management approvals during the performance evaluation review. Once the meeting with your employee is completed, he/she will need to sign a hard copy of the evaluation.

## Supervisor and Manager Quick Reference Guide (QRG)



Employment with the state is more than just a job – it is a privilege to serve our families, friends, and neighbors across this great state. Each day our employees strive to deliver excellence, accountability and efficiency through Ohio's government.

### How to Access:

<https://myohio.oaks.ohio.gov>

### Included in this QRG:

- The Performance Evaluation process with step-by-step instructions
- Performance Rating Scales & Definitions
  - Evaluation Types
- Other available Employee Development Tools