OhioDAS Human Resources Division | OAKS

2016

Employee Self Evaluation

Revised:

6/29/2016

Self Evaluation Process

At the beginning of an annual evaluation cycle, it is a very good practice for you (the Employee) and your supervisor (the Manager (Rater)) to meet in order to set your goals for the upcoming year. You will be evaluated on these same goals at the end of the evaluation cycle in the Performance Evaluation process. In addition to these goals, you will also be evaluated on preset competencies.

The Self Evaluation portion of a Performance Evaluation provides you with an opportunity to share your perspective with the Manager (Rater) of how well you met the criteria that was predefined for each competency and goal. You will be able to rate your performance on every individual criteria for each section. Each section will also have an overall section summary rating, where you can enter your overall performance rating for the specific section, and a comments box.

Sections of the Self Evaluation:

- Statewide Competency
- Agency Competencies
- Classification Competencies
- Goals and Performance Expectations

NOTE: Not all Agencies will be using the Self Evaluation process, and some agencies may not use all sections listed in the evaluation process.

Enter Self Evaluation Information

After the Manager (Rater) enters the performance criteria into an evaluation document, you will receive an email notification stating that you are able to view the document and that you can now complete the Self Evaluation portion of the Performance Evaluation process.

Step I – Locate the Performance Evaluation Document

1. Navigate to your performance evaluation: ***myOhio > Career Resources > My Performance Documents > Current Documents***.

2. Click the ***Document Type*** hyperlink for the appropriate document type.

3. Click the ***Start*** hyperlink next to the ***Complete Self Evaluation*** step.

Step II – Enter Statewide Competency Rating and Comments

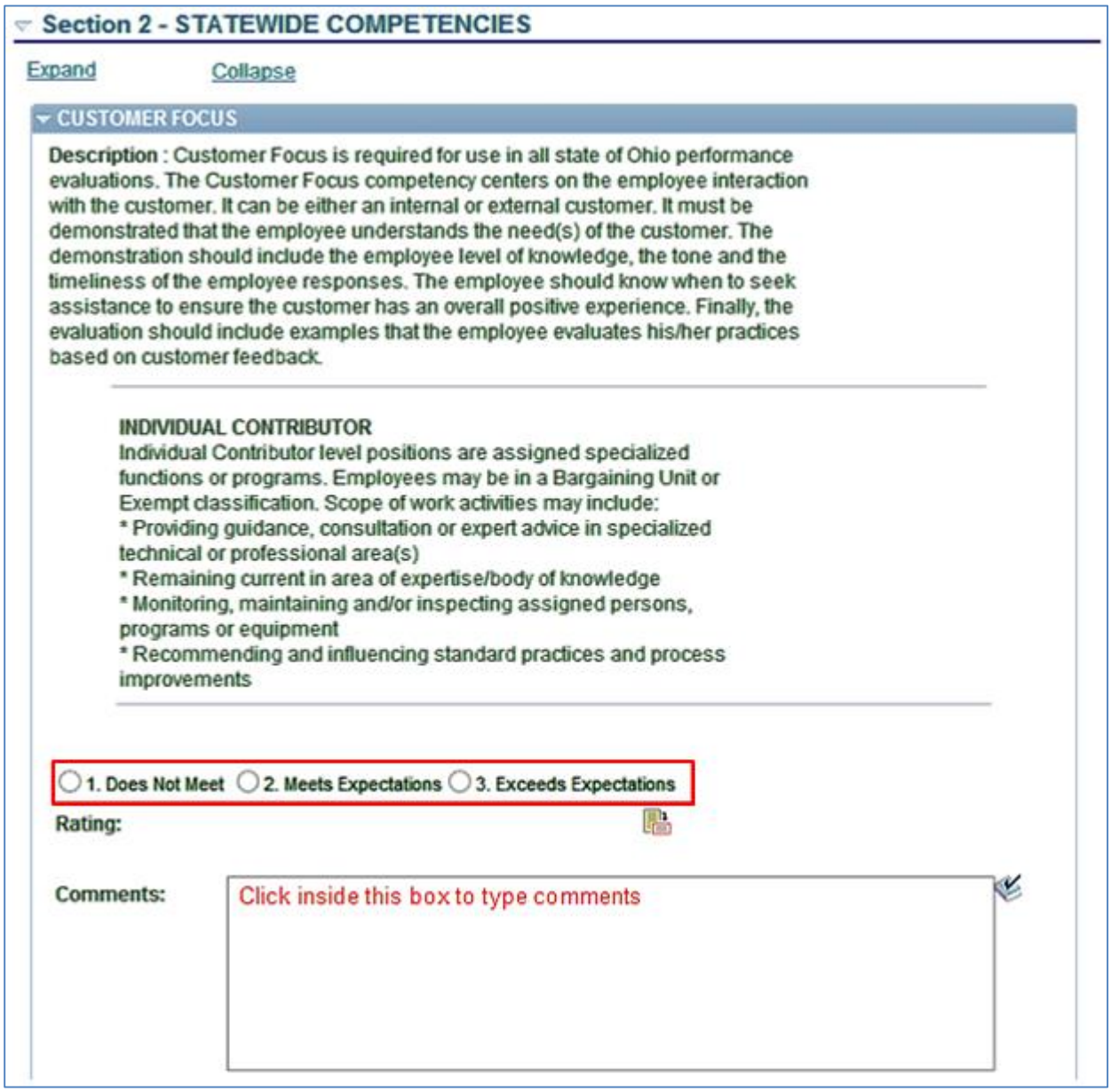
1. Starting with ***Section 2 – Statewide Competencies***, click the ***Expand*** hyperlink to expand all section content.

NOTE: The State of Ohio defines **Competencies** as measurable patterns of knowledge, skills, and abilities and other characteristics designed to reflect the behaviors in how employees complete their assignments. Some competencies, like Customer Focus, apply to every job in the state. Others, like Repairing and Maintaining Electronic Equipment, only apply to specific jobs.

NOTE:
The Statewide Competencies section contains the competencies that are required for all State of Ohio employees. Currently, the State of Ohio has only chosen to evaluate Customer Focus in this section pursuant to ORC 121.91 (A).

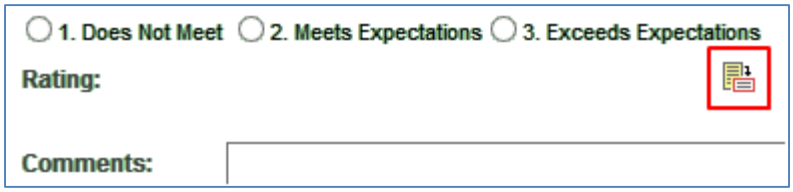
At this time, the State of Ohio defines Customer Focus as follows:
Focuses on the customer, whether internal or external, by understanding the needs of the customer and responding in a timely fashion, responding to customer feedback, and seeking out help and information when needed.

2. Assign ratings to the competency by clicking the appropriate ***radio button***; type related comments into the ***Comments*** field.

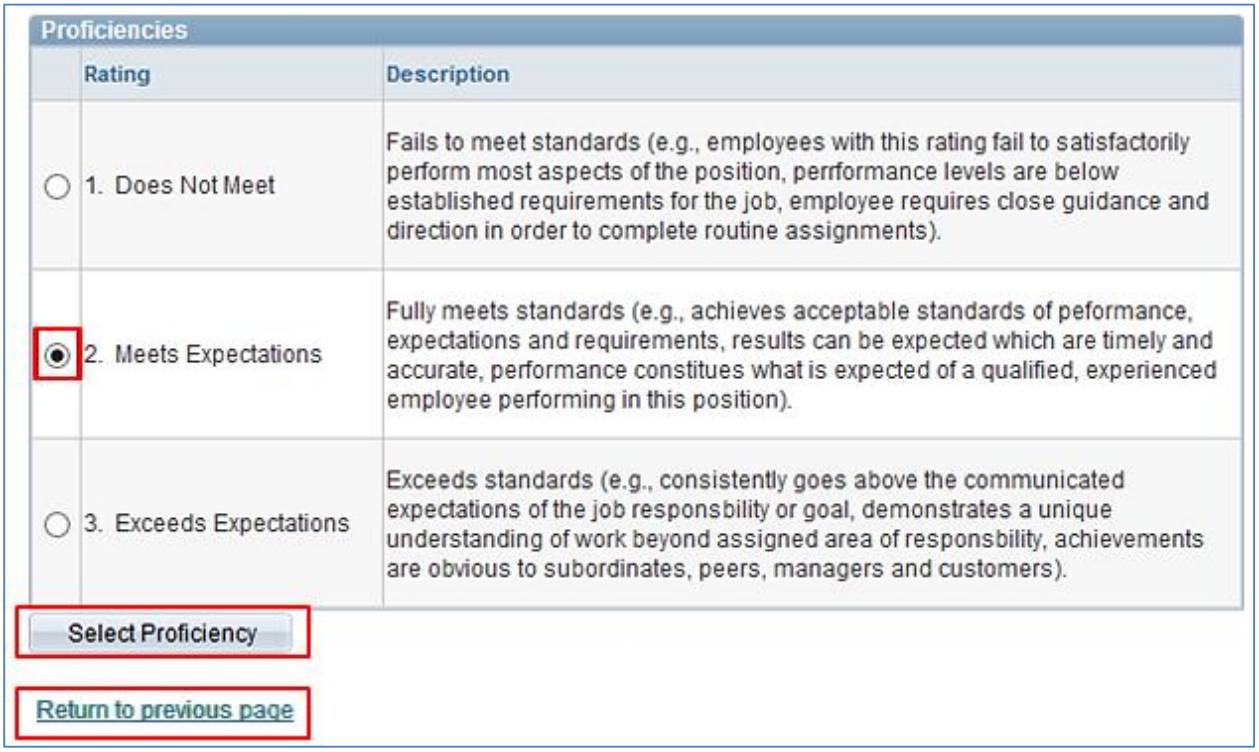


NOTE: You can spell check any text box that has the spellcheck icon next to it. Click this icon and a new screen will appear with applicable spelling suggestions.

If you would like to see the definition of each rating, click the ***Rating Description*** icon.



Either assign the rating by clicking the appropriate ***radio button*** on this page and then clicking the ***Select Proficiency*** button or click the ***Return to previous page*** hyperlink to rate the competency there.



Proficiencies

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

Select Proficiency

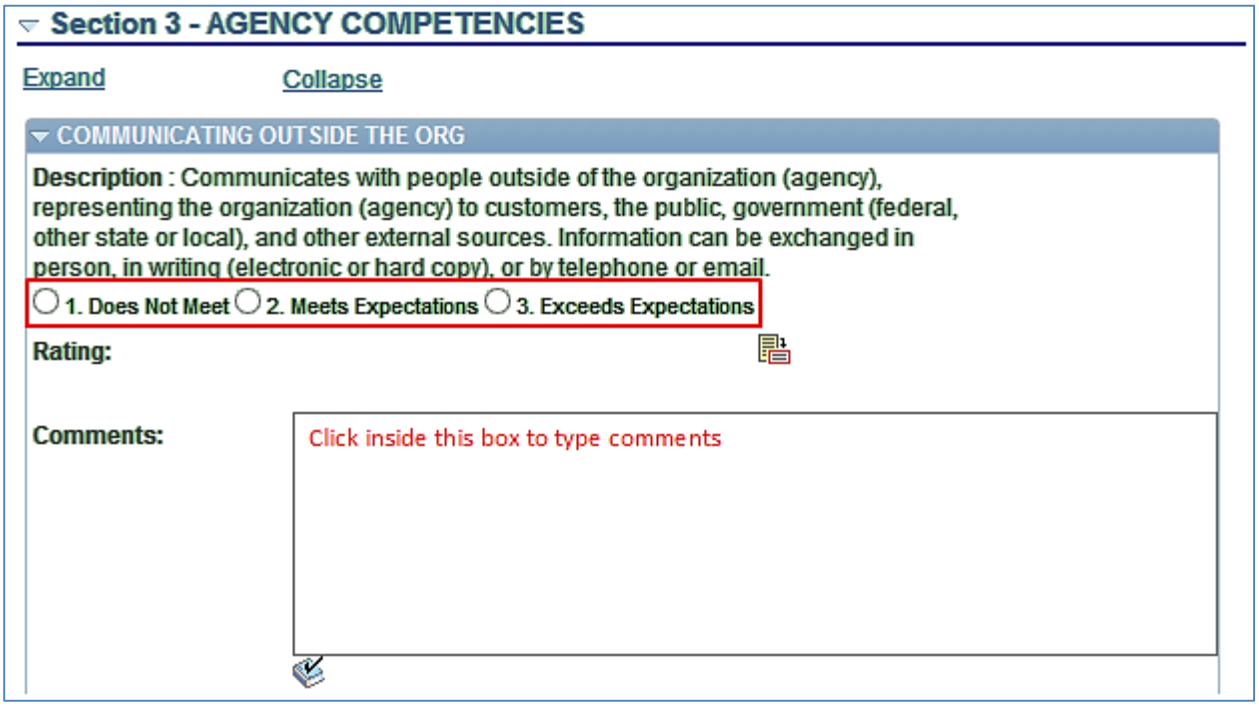
Return to previous page

Step III – Enter Agency Competency Ratings and Comments

1. In ***Section 3 – Agency Competencies***, click the ***Expand*** hyperlink to expand all competencies within the section.

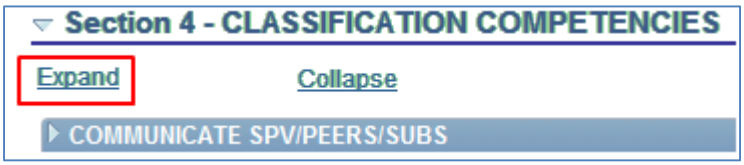
NOTE: If an agency chooses to rate all of its employees on specific competencies in addition to the statewide competency, those competencies will appear in this section. This section is optional, so there may be no competencies available to rate.

2. Assign ratings to each individual competency by clicking the appropriate ***radio button***; type related comments into the appropriate ***Comments*** field.

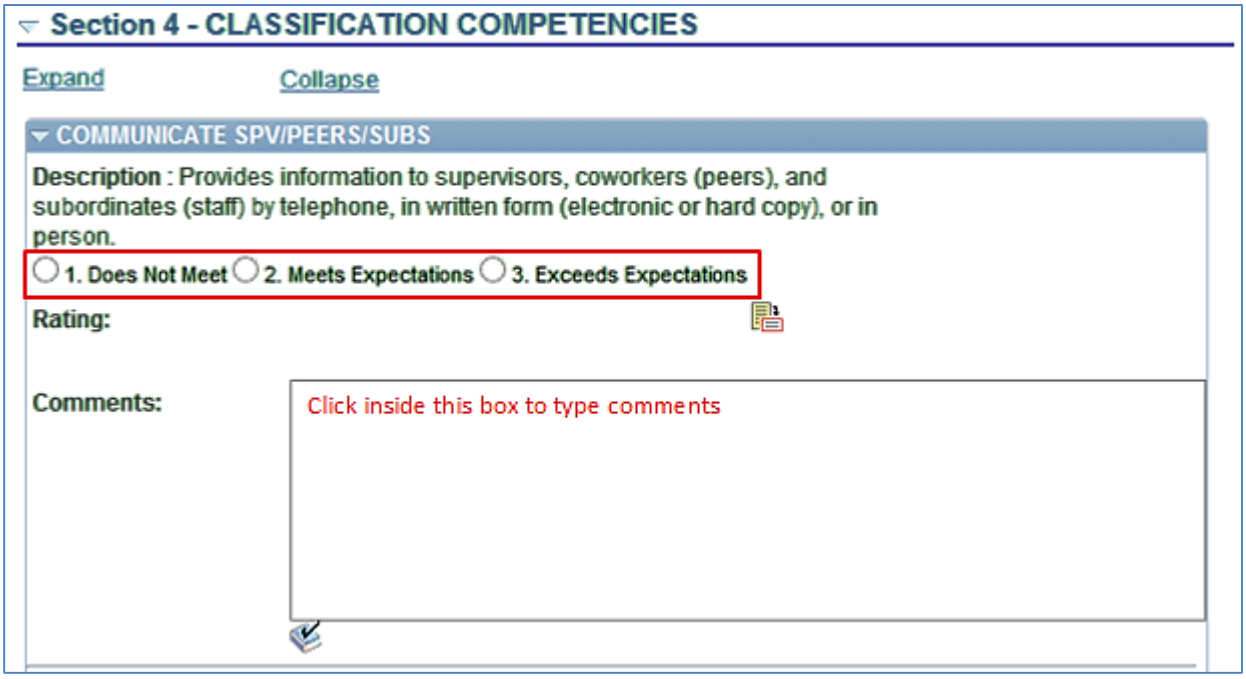


Step IV – Enter Classification Competency Ratings and Comments

1. In ***Section 4– Classification Competencies***, click the ***Expand*** hyperlink to expand all competencies within the section.



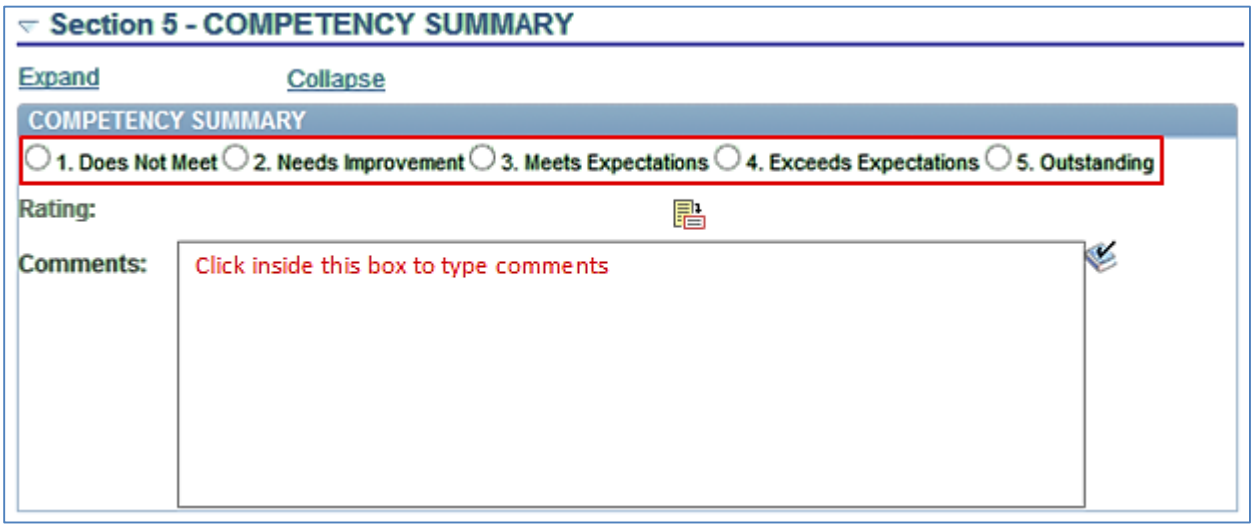
2. Assign ratings to each individual competency by clicking the appropriate ***radio button***; type related comments into the appropriate ***Comments*** field.



Step V – Enter Competency Summary Ratings and Comments

1. Assign a rating to the competency summary by clicking the appropriate ***radio button***; type related comments into the ***Comments*** field.

NOTE: Section 5 summarizes all individual ratings recorded in Sections 2 (Statewide Competencies), 3 (Agency Competencies), and 4 (Classification Competencies).



Step VI – Enter Goals and Performance Expectations Ratings and Comments

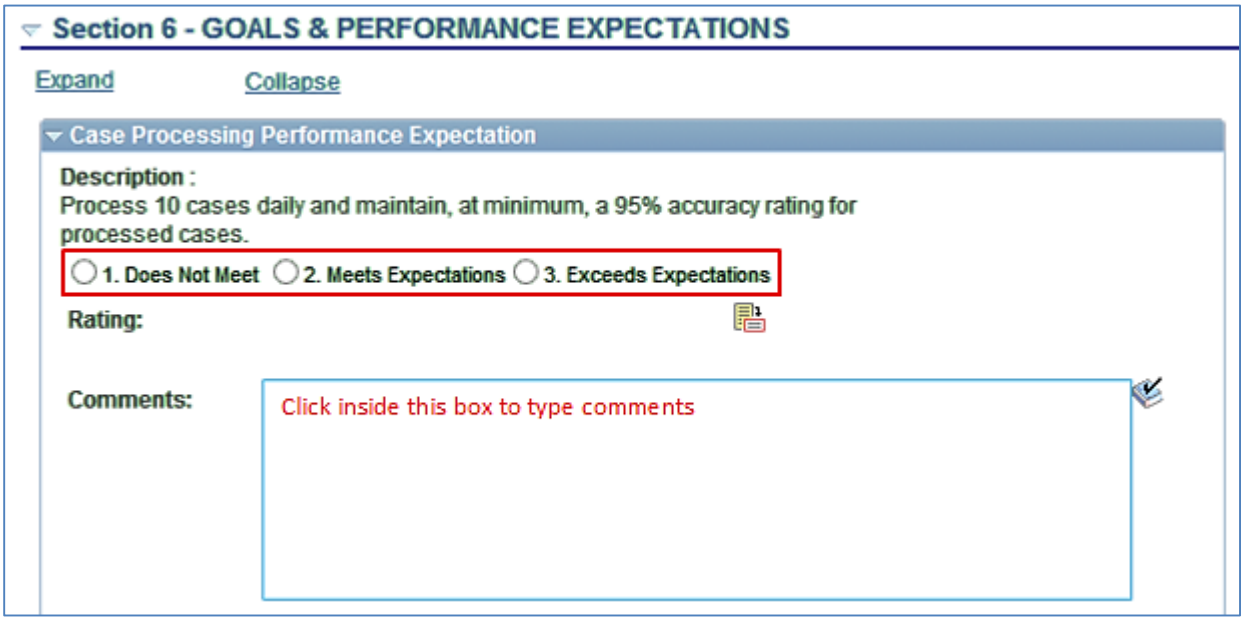
1. In ***Section 6 – Goals and Performance Expectations***, click the ***Expand*** hyperlink to expand the section.

NOTE: **Goals** are the improvements you should make to your work activities or the products you create that could help you make a better or larger contribution toward achieving your agency's purpose. Improvement goals can be different for different employees.

Performance expectations are the expectations for work product quantity, quality, timeliness, and results that apply to regular and routine job duties. Performance expectations are the same for every employee performing the same job.

Goals and performance expectations may be set by your supervisor, agency management, or statewide management.

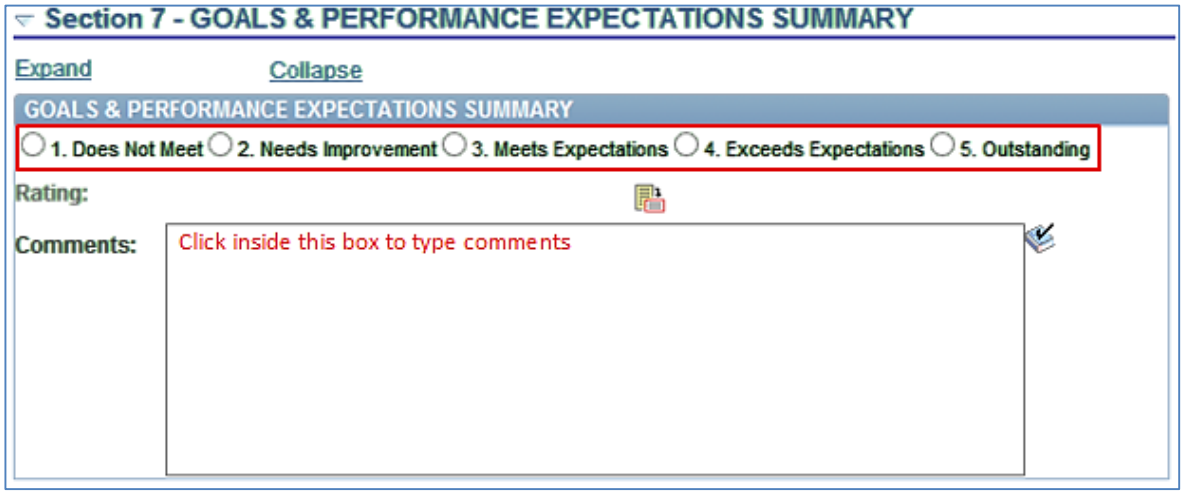
2. Assign ratings to each individual goal or performance expectation by clicking the appropriate ***radio button***; type related comments into the appropriate ***Comments*** field.



Step VII – Enter Goals and Performance Expectations Summary Ratings and Comments

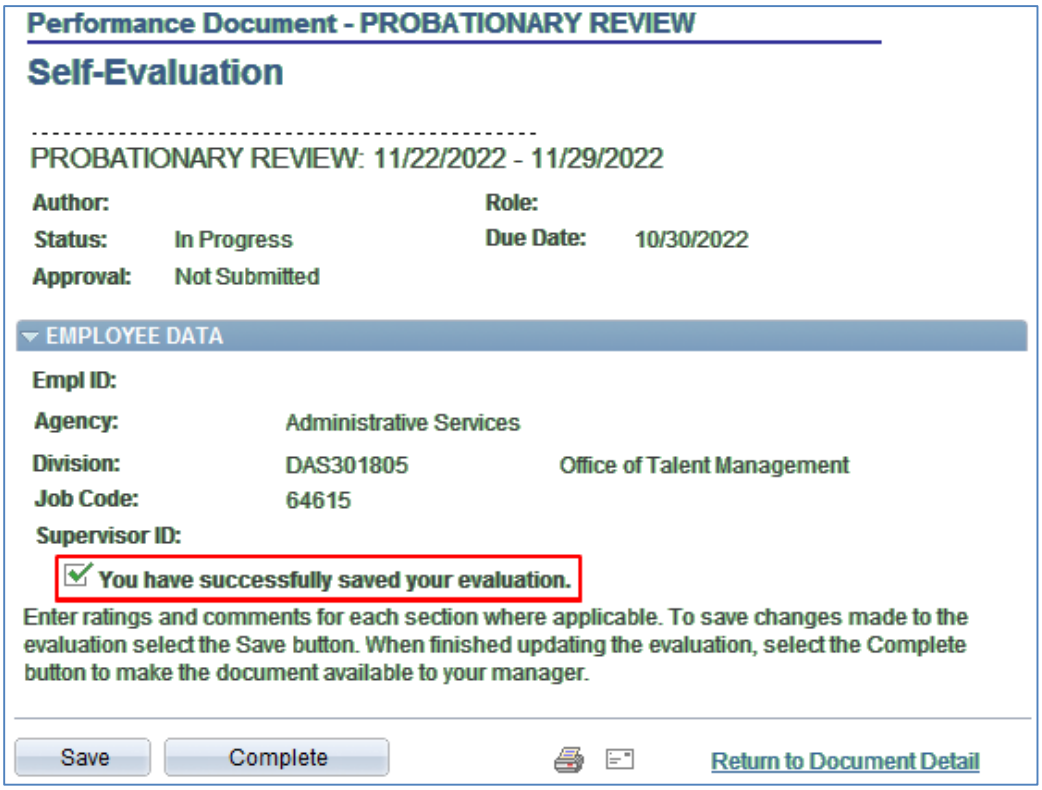
1. Assign a rating to the goals and performance expectations summary by clicking the appropriate ***radio button***; type related comments into the ***Comments*** fields.

NOTE: Section 7 summarizes all individual ratings recorded in Section 6 (Goals & Performance Expectations).

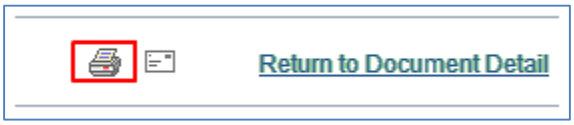


NOTE: Section 8 – Overall Performance Summary will be blank for all employee self evaluations. You will not need to provide an overall rating when you complete your self-evaluation.

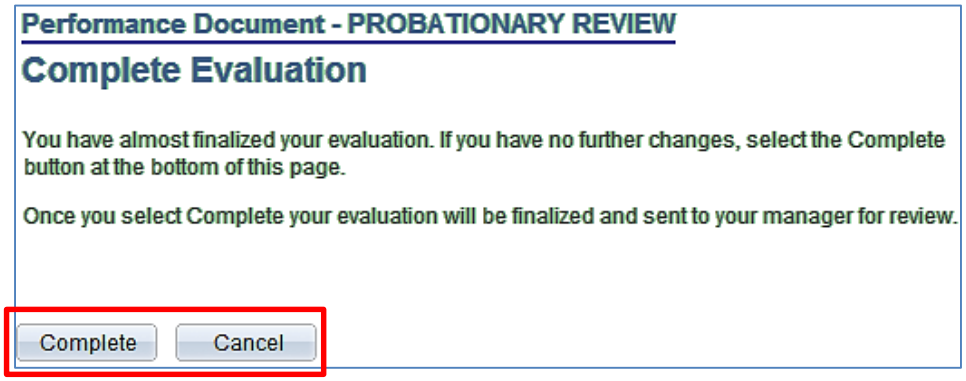
2. Click the ***Save*** button at bottom of page. You then receive confirmation that the changes have been saved.



3. If you wish to print the document, click the ***Print*** icon. It will open a PDF version of the performance self-evaluation document that you can either print or save to your computer.



4. Click the ***Complete*** button. A new screen will appear with a prompt to click a second complete button because you will not be able to edit the document after you complete it. This second complete screen is your chance to return to the document if you are not actually finished with it. If you wish to return to the document, click the ***Cancel*** button instead of the ***Complete*** button.



5. Click the ***OK*** button.

Step VIII – Document Details Page

1. The ***Document Details Page*** will automatically display. The "Status" for the Complete Self Evaluation step will change to "Completed" as illustrated in the screen shot below. You will also receive a confirmation that the evaluation has been completed.

Current Performance Documents

Document Details

PROBATIONARY REVIEW: 11/22/2022 - 11/29/2022

You have successfully completed your evaluation.

Performance Document Details

Employee:		**Job Title:**	Human Capital Management Mgr
Document Type:	PROBATIONARY REVIEW	**Period:**	11/22/2022 - 11/29/2022
Template:	PROBATION PERFORMANCE REVIEW	**Document ID:**	23649
Manager:		**Status:**	In Progress

Document Progress

Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✔	Completed	01/28/2022	View	
Complete Self Evaluation	✔	Completed	10/30/2022	View	
Review Manager Evaluation	○	Not Started	11/14/2022		

Return to Select Documents

2. The Manager (Rater) will receive an email notification that you have completed a self evaluation.

3. The Self Evaluation portion of the Performance Evaluation process is now complete.