



## Performance Management and Development

# Spotlight for Supervisors

**JUNE 2020**

The third and final phase of the *Performance Management and Development Cycle* is **Evaluate**.

During this end-of-cycle phase, supervisors are expected to **gather specific examples** that support the final evaluation; assess **overall performance observed** throughout the entire evaluation period; refer to **notes collected** on employees' performance; and present the overall evaluation to each employee during a **formal one-on-one meeting**.

Within ePerformance, supervisors can begin the evaluation process by **COMPLETING** the Establish Evaluation Criteria step, if not done already. From there, ratings and comments can be applied within the Complete Manager Evaluation step, and then the evaluation must be **SUBMITTED FOR APPROVAL**. Once the document has routed through the necessary approvals (typically the Manager Reviewer and HR), supervisors will make the document **Available for Review**, allowing the employee to view **ALL** ratings and comments provided in the Complete Manager Evaluation Step.

After a formal evaluation meeting has been conducted, supervisors will click **Mark Review Held**, within the same step, and then wait for the **Employee to Acknowledge** the document. Finally, supervisors can mark the document **COMPLETE**.



### Learning on Demand

Below are available resources to assist you in exploring more on the *Evaluate Phase*.

- **Planning an Effective Performance Appraisal**  
[Course, 20 minutes](#)
- **Detecting and Dealing with Performance Problems**  
[Course, 26 minutes](#)
- **Supporting an Employee's Ongoing Performance**  
[Video, 3 minutes](#)

To learn more about the *Evaluate Phase* and other aspects of *Performance Management & Development*, you can visit **Learning on Demand**.

- Go to [MyOhio.gov](http://MyOhio.gov).
- Sign on with your OH|ID Workforce User ID and Password. User IDs and Passwords are case sensitive. Be sure your caps lock key is off.
- Click **My Workspace**, then select **Applications** and click **Learning on Demand**.

**NOTE:** Please **review and adhere** to your agency's training and development policies, procedures, and guidelines regarding the use of Learning on Demand resources and tools.

### ePerformance System

The resources below are available to assist you with system actions related to the *Evaluate Phase*.

- **Manager Rater Quick Reference Guide** – [PDF](#)
- **Manager Rater Evaluates Employee Performance** – [PDF](#) / [VIDEO](#)
- **Manager Rater Completes A Performance Document** – [PDF](#) / [VIDEO](#)

### Tips and Tricks

- Within an evaluation there are multiple summary sections (e.g., Competency and Goals & Performance Expectations) as well as an overall rating section (e.g., Overall Performance Ratings Summary). These sections have **more ratings to choose from**, allowing supervisors more flexibility in their decision. If each competency and/or goal has the same rating applied (e.g. Meets Expectations), your Summary Section should reflect that same rating. If you have differing ratings for competencies and/or goals in an evaluation, make sure that your Summary rating is **justified**, based on the rating applied, with detailed and specific comments and supporting documentation.
- If you would like to attach supporting documentation (e.g. worksheets, emails, recognition, notes), you can only do so **BEFORE** Submitting for Approval. There are two options for attachment visibility: **MGR ONLY**, in which **ONLY** the approval chain will see the attachments; or **MGR and EMPL** in which the employee can see the attachments **after** the document has been made **Available for Review**.

To learn more about the ePerformance System and its features, visit the ePerformance Toolkit by clicking on the following link: [ePerformance Toolkit](#) or by contacting us at: [ePerformance@das.ohio.gov](mailto:ePerformance@das.ohio.gov).

*Engaging and Developing Talent*