Employee Self Evaluation
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


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.

<table>
<thead>
<tr>
<th>Section 2 - STATEWIDE COMPETENCIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand</td>
</tr>
<tr>
<td>CUSTOMER FOCUS</td>
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**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.
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).

   ![Section 5 - COMPETENCY SUMMARY]

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.

   ![Section 6 - GOALS & PERFORMANCE EXPECTATIONS]
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).
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.

**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.
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.

   **Performance Document - PROBATIONARY REVIEW**
   **Complete Evaluation**
   You have almost finalized your evaluation. If you have no further changes, select the Complete button at the bottom of this page.
   Once you select Complete your evaluation will be finalized and sent to your manager for review.

   ![Complete and Cancel buttons](image)

5. Click the **OK** button.

   **Performance Document - PROBATIONARY REVIEW**
   **Complete Evaluation Confirmation**
   Your evaluation is finalized and marked as "Complete".

   ![OK button](image)
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.

   ![Document Details Page]

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.