

# ePerformance Supervisor Training



**Middle Georgia** State University

# Agenda

- Importance of Annual Evaluations
- What is ePerformance?
- Goals
- Job Duties
- Performance Factors
- MGA Core Values
- Process Review
- Process Flow
- Timeline
- Resources & Tools
- FAQs
- Questions?

# Importance of Annual Evaluations

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- Increase Employee Engagement
- Create career growth
- Identify training needs
- Clarify expectations
- Evaluate goals



# What is ePerformance?



ePerformance is a robust, web-based, self-service performance solution that will improve the evaluation process.

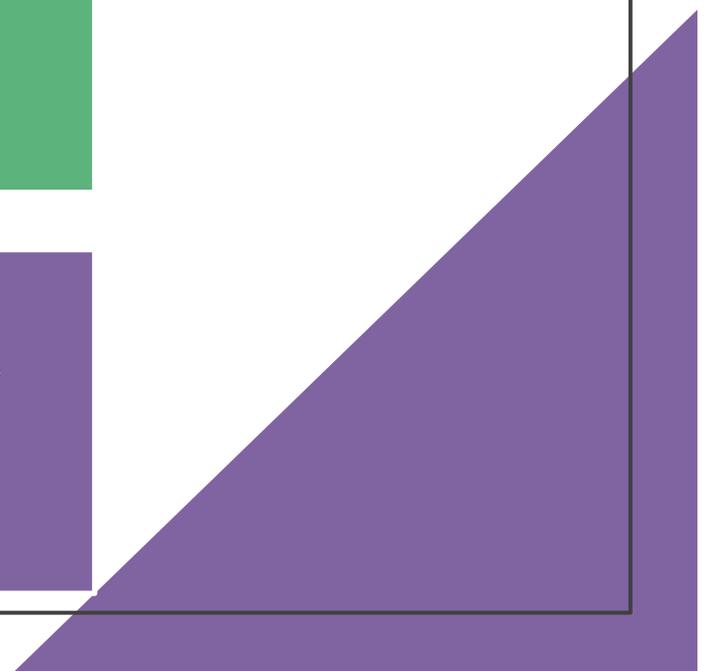
# Areas of Evaluation

Goals  
(25%)

Job Duties  
(40%)

Performance  
Factors  
(20%)

MGA Values  
(15%)



# Goals



Specific



Measurable



Attainable



Relevant



Time Based

# Job Duties



Human Resources Generalist  
Office of Human Resources

## JOB SUMMARY

This position performs duties and services to support the operations of the Human Resources (HR) department. The position serves as a subject matter expert in HR related competencies such as recruitment, employment transactions, policy compliance, benefits administration, onboarding, data reporting, and other related HR functional areas. The primary responsibility of this position pertains to managing the onboarding, off-boarding, recruitment, and hiring of employees.

## MAJOR DUTIES

### 70%

- Manages and updates all employee transactions in the HRIS to ensure accurate pay and benefits for employees.
- Performs employee hiring processes; to include background checks, compliance with USCIS Form I-9 requirements and onboarding of employees.
- Conducts employee orientations and assists with benefit enrollment.
- Prepare offer letters for employees to include hires, promotions, transfers, and other changes.
- Maintain employee personnel files to ensure compliance with record-keeping policies.
- Provides support to employees in various benefits related topics such as FMLA leave, Worker's compensation, Shared Sick leave, disability claims, retirement, and other benefits questions.
- Counsels employees on various HR topics and functions; communicates and shares an understanding of institution policies and procedures, employment laws, standards and other government regulations.
- Assists with recruitment and hiring processes by review and development of job descriptions, posts job openings, administers applicant tracking system, and conducts final review of search materials.
- Advise, train, and troubleshoot on applicant system access and processes for hiring managers and search committee members.
- Conducts off-boarding of employees to include exit interviews.
- Participates in developing departmental guidelines and procedures.

### 30%

- Process employee separations and notifications to appropriate retirement and benefit administrators.
- Ensures employment verification of rehired retirees.
- Responds to inquiries pertaining to unemployment claims.
- Assists in monitoring various reports from the Shared Services Center.
- Assists with annual events such as open enrollment and reception for retirees.
- Assists with the coordination of paperwork associated with the Family and Medical Leave Act (FMLA) and ADA accommodation requests.
- Assist with the maintenance of the HR webpage and online employee directory.
- Performs other job related duties as assigned.

## KNOWLEDGE REQUIRED TO BE SUCCESSFUL

- Knowledge of current federal and state employment law and regulations.
- Knowledge of human resources principles, practices, and processes.
- Knowledge of the recruitment process.
- Knowledge of personnel file maintenance.



Human Resources Generalist  
Office of Human Resources

## JOB SUMMARY

This position performs duties and services to support the operations of the Human Resources (HR) department. The position serves as a subject matter expert in HR related competencies such as recruitment, employment transactions, policy compliance, benefits administration, onboarding, data reporting, and other related HR functional areas. The primary responsibility of this position pertains to managing the onboarding, off-boarding, recruitment, and hiring of employees.

## MAJOR DUTIES

### Recruiting and onboarding 30%

- Performs employee hiring processes; to include background checks, compliance with USCIS Form I-9 requirements and onboarding of employees.
- Prepare offer letters for employees to include hires, promotions, transfers, and other changes.
- Assists with recruitment and hiring processes by review and development of job descriptions, posts job openings, administers applicant tracking system, and conducts final review of search materials.
- Advise, train, and troubleshoot on applicant system access and processes for hiring managers and search committee members.

### Employee Administration & Support 40%

- Manages and updates all employee transactions in the HRIS to ensure accurate pay and benefits for employees.
- Maintain employee personnel files to ensure compliance with record-keeping policies.
- Counsel employees on various HR topics and functions; communicates and shares an understanding of institution policies and procedures, employment laws, standards and other government regulations.
- Conducts off-boarding of employees to include exit interviews.
- Participates in developing departmental guidelines and procedures.

### Benefits Administration 30%

- Process employee separations and notifications to appropriate retirement and benefit administrators.
- Ensures employment verification of rehired retirees.
- Responds to inquiries pertaining to unemployment claims.
- Assists in monitoring various reports from the Shared Services Center.
- Assists with annual events such as open enrollment and reception for retirees.
- Assists with the coordination of paperwork associated with the Family and Medical Leave Act (FMLA) and ADA accommodation requests.
- Assist with the maintenance of the HR webpage and online employee directory.
- Performs other job related duties as assigned.
- Conducts employee orientations and assists with benefit enrollment.
- Provides support to employees in various benefits related topics such as FMLA leave, Worker's compensation, Shared Sick leave, disability claims, retirement, and other benefits questions.

## KNOWLEDGE REQUIRED TO BE SUCCESSFUL

- Knowledge of current federal and state employment law and regulations.
- Knowledge of human resources principles, practices, and processes.

# Performance Factors

Communication	Customer Service	Initiative	Job Knowledge	Adherence to University Policies
The extent to which employee is proficient and professional in oral and written communication. This includes listening, understanding, remembering, and following oral or written instructions; asking for clarification when necessary and providing information to others in a clear, complete and concise manner.	The extent to which the employee provides a customer friendly environment and superior service to our clients, patients, coworkers, supervisors, subordinates, faculty and students. The employee resolves customer needs with confirmed satisfaction, responsiveness, and outcomes.	The extent to which employee is a self-starter, shares new ideas for doing things, and is willing to assume additional duties when necessary. Displays positive attitude and willingness to improve both personally and professionally in a constantly changing environment.	The extent to which employee understands their job duties and responsibilities and applies the practical and technical knowledge and skills required for the position.	The extent to which the employee follows system, college/university and department-specific policies and procedures (dress guidelines, professionalism, administrative policies & procedures).

Quality of Work	Interpersonal Relationships	Reliability/ Attendance	Critical Thinking
The extent to which employee's work is consistently accurate, thorough, and is accomplished in a professional manner. Employee works efficiently and productively while effectively managing resources (labor, time, materials, etc).	The extent to which employee cooperates, works and communicates with internal and external customers such as clients, patients, coworkers, supervisors, subordinates, faculty, and students. The employee has the ability and willingness to work effectively within a team and support others as well as accept support and feedback when needed to accomplish task or mission.	The extent to which an employee can be relied upon regarding task completion and follow-up. The employee meets deadlines with accuracy, work quality and customer satisfaction. Employee has an acceptable overall punctuality and attendance record.	The extent to which the employee demonstrates proper judgment in decision-making and displays effective problem-solving skills.

<b>Organizational Development</b>	Delegates and directs effectively; shows respect, confidence and trust in others; sets realistic goals and performance objectives; Builds department and personnel capacity through succession planning.
<b>Fiscal/ Budget Management</b>	The effectiveness with which the individual uses and allocates financial resources and keeps expenditures within approved budget.
<b>Innovation</b>	The extent to which the employee is receptive to new ideas and has the ability to adjust to change with minimum disruption to productivity. Contributes useful ideas for improved performance.
<b>Strategic Planning</b>	The effectiveness to which the leader sets priorities, secures and utilizes resources, strengthens operations, ensures that employees and other stakeholders are working toward common goals, establishes agreement around intended outcomes/results, and assesses and adjusts the unit's directives based on the needs of the University.

# Additional Performance Factors for Leaders Only

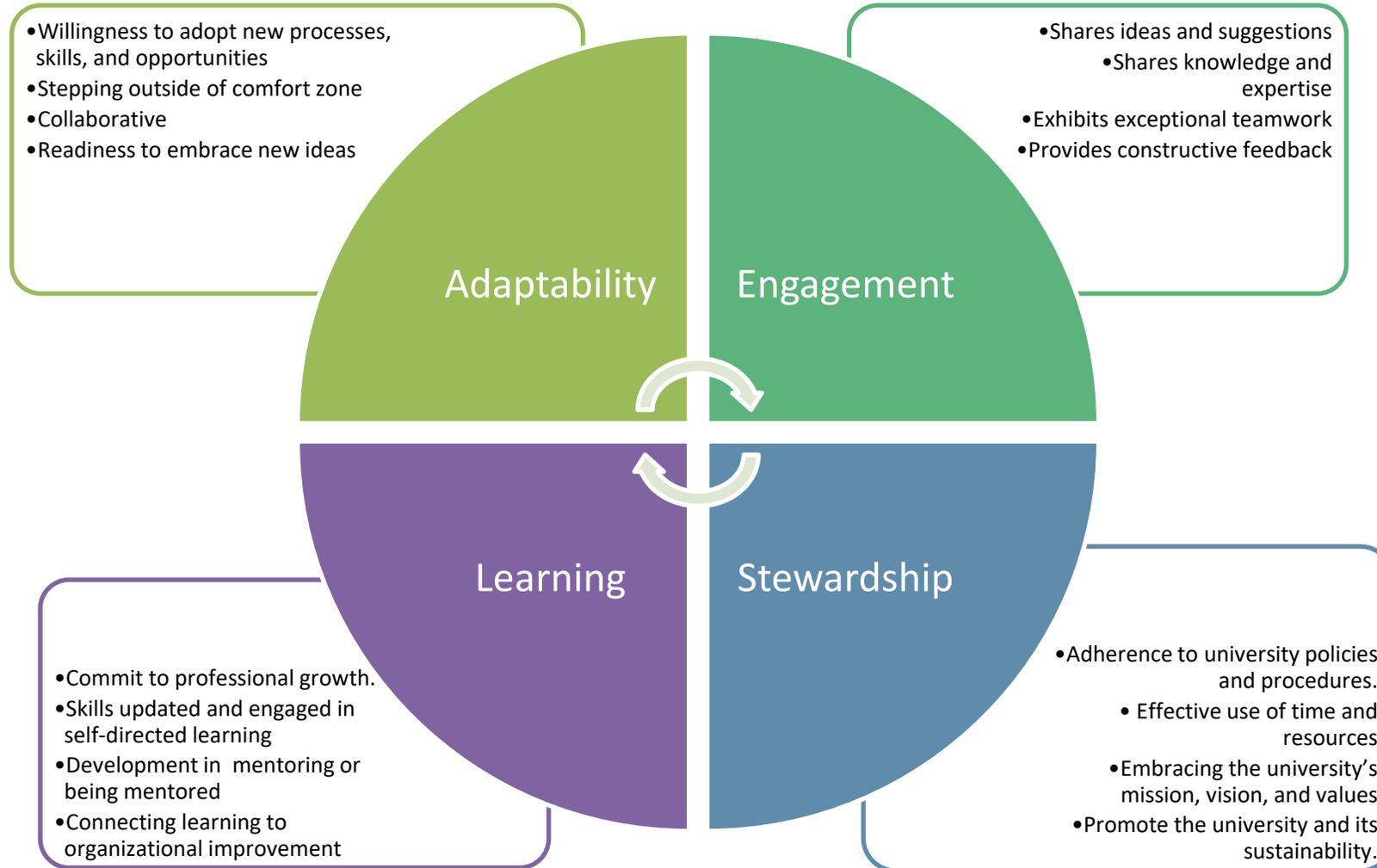


# Evaluating MGA Core Values

Stewardship	Engagement	Adaptability	Learning
Reminding us of our moral and public commitment to the people we serve on and off campus and tasking each of us with the responsibility to marshal our time, talents, and resources for the "Common Good".	Recognizing that learning is a social activity and that we cannot fulfill our mission of public higher education without collaborating with those on our campuses and outside our doors in our communities.	A cornerstone of human growth, individual and collective, and necessary hallmark of progress and success, requiring us to lead and manage change – not be simply affected by it.	These values underpin that of learning, the reason we exist as an institution and why students entrust us and also what we each must do continuously as faculty and staff to stay abreast of expanding and changing fields of knowledge and grow professionally.

*“Our Values unify us and help us to “SEAL” our success as a university.” President Christopher Blake*

# Evaluating MGA Core Values



# Rating Scale

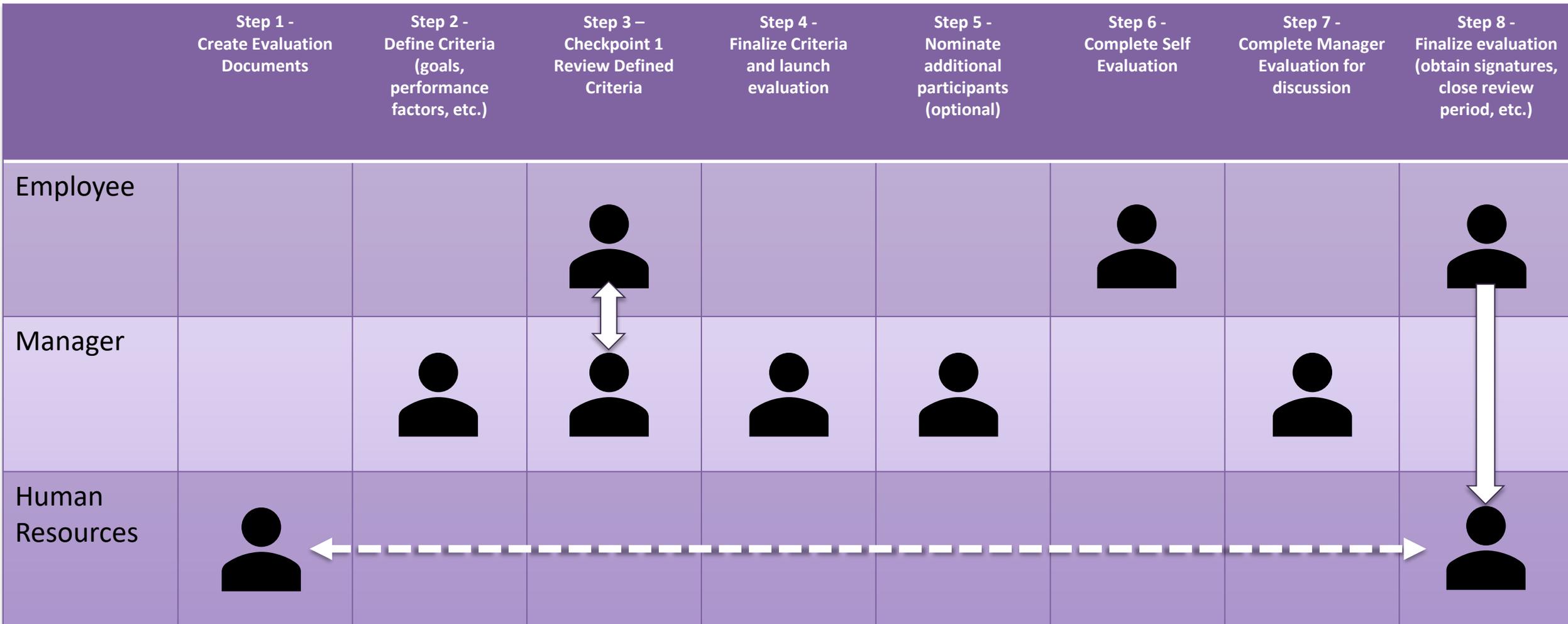
Rating Scale	Definition	Behavioral Indicators
<b>Exemplary</b>	Outstanding performance that constantly exceeds milestones.	<ul style="list-style-type: none"><li>• Displays advanced knowledge and skills</li><li>• Proactively seeks new challenges.</li></ul>
<b>Superior</b>	Good, solid performance that fully meets milestones and on occasion exceeds milestones.	<ul style="list-style-type: none"><li>• Demonstrates strong, consistent leadership.</li><li>• Results add value.</li></ul>
<b>Successful</b>	Good solid performance that meets all milestones.	<ul style="list-style-type: none"><li>• Shares knowledge and skills appropriately.</li><li>• Meets expectations.</li></ul>
<b>Emerging</b>	Performance falls short of the minimum criteria and standards of milestones. Immediate and substantial improvement is needed to address this area.	<ul style="list-style-type: none"><li>• Work behavior occasionally fall below required levels.</li><li>• Improvement required.</li><li>• Could be attributed to newness on the job, missing skills, etc.</li></ul>
<b>Not Successful</b>	Performance in this area is inconsistent and does not meet milestone. Performance feedback and efforts to reinforce competency may provide the tools to achieve success.	<ul style="list-style-type: none"><li>• Lacks the knowledge of the position to accomplish goals.</li><li>• Has not demonstrated the ability to retain key job knowledge.</li><li>• Does not seek development opportunities.</li></ul>

# Process Review

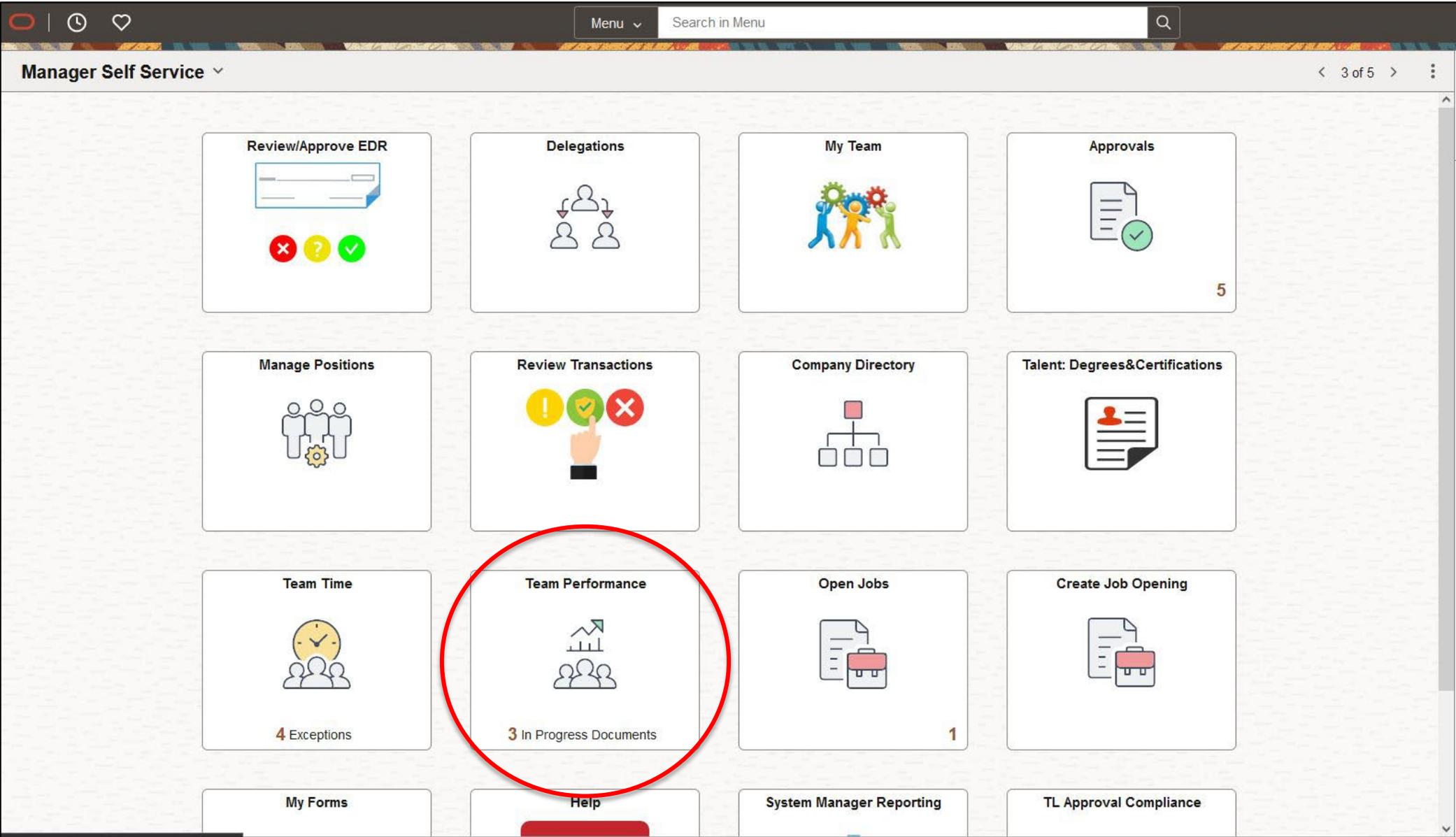


**Middle Georgia** State University

# Performance Evaluations Process Flow



# Define Criteria: Log into OneUSG. In Manager Self Service, Choose Team Performance Tile.



**Define Criteria:** Under “Current Documents”, choose the team member to evaluate.

← | 🕒 | ❤️ | 🔍 Search in Menu | 🏠 | 🔔 | ⋮ | 🔄

### Team Performance

- Current Documents**
- Delegated Documents
- Historical Documents
- View-Only Documents
- Approve Documents
- View Approval Status

#### Current Documents

3 rows

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date	
 <b>Sylvia Register</b> Payroll & System Implement Mgr	USG Annual Review for Staff	Define Criteria	01/01/2024 12/31/2024	12/31/2024	>
 <b>Tiffany Leslie</b> Human Resources Generalist	USG Annual Review for Staff	Define Criteria	01/01/2024 12/31/2024	12/31/2024	>
 <b>Ruby Ronca</b> Human Resources Specialist	USG Annual Review for Staff	Define Criteria	01/01/2024 12/31/2024	12/31/2024	>

# Define Criteria: Add Goals for Annual Evaluation.

Performance Process

Performance Process Settings Back

Steps and Tasks Refresh Filter

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024  
**Update and Approve**
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

**Define Criteria - Update and Approve**

[Print](#) | [Notify](#) | [Export](#)

Tiffany Leslie  
[Actions](#)

Job Title	Human Resources Generalist	Manager	Pamela Booker
Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
Template	Staff-No Add/No Aprvl/Inst Val	Document ID	35150
Status	In Progress	Due Date	12/31/2024

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

**Goals**   Job Duties   Performance Factors   Values

Section 1 - Goals

Goals will be evaluated by: Employee, Manager, Other

[Add Item](#)

**Goals Summary**

Section Weight  % (not less than 25%)

**Audit History**

Created By Ruby Ronca      03/18/2024 10:27:06AM

# Define Criteria: Add Goals (cont.)

Goals    Job Duties    Performance Factors    Values

Section 1 - Goals

Goals will be evaluated by: Employee, Manager, Other

**Add Item**

Goals Summary

Section Weight  % (not less than 25%)

Performance Process

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024    Overview

- Define Criteria  
Due Date 12/31/2024  
Update and Approve
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

**Add Item**

- Add pre-defined item
- Add your own Item
- Copy item from my Documents
- Copy Item from My Team's Documents

**Next**

Return

Performance Process

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024    Overview

- Define Criteria  
Due Date 12/31/2024  
Update and Approve
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

**Add Your Own Item**

\*Title

Description

Start Date

End Date

**Add**

Return

# Define Criteria: Add Goals (cont.)

**Performance Process**

Performance Process Settings Back

Steps and Tasks Refresh Dropdown

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
  - Update and Approve**
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

**USG Annual Review for Staff** Save Approve

**Define Criteria - Update and Approve** Print Notify Export

Tiffany Leslie  
Actions -

Job Title	Human Resources Generalist	Manager	Pamela Booker
Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
Template	Staff-No Add/No Aprvl/Inst Val	Document ID	35150
Status	In Progress	Due Date	12/31/2024

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

**Goals** Job Duties Performance Factors Values

Section 1 - Goals

Goals will be evaluated by: Employee, Manager, Other

[Expand](#) | [Collapse](#) | [Add Item](#)

Goal 1

Description : Enter description of the Goal Copy Edit Delete

- Start Date : 01/01/2024
- End Date : 12/31/2024

Created By Pamela Booker 03/25/2024 11:51AM

Goals Summary

Section Weight  % (not less than 25%)

# Define Criteria: Review Job duties

## Uncategorized Job Duties

The screenshot shows the 'Performance Process' interface for 'USG Annual Review for Staff'. The left sidebar lists steps: Define Criteria (12/31/2024), Checkpoint 1 (11/01/2024), Finalize Criteria (12/31/2024), Nominate Participants (12/31/2024), Review Participant Evaluations (12/31/2024), Review Self Evaluation (12/31/2024), and Complete Manager Evaluation (12/31/2024). The 'Define Criteria' step is active, showing 'Update and Approve' as the current task. The main content area is titled 'Define Criteria - Update and Approve' and shows 'Section 2 - Job Duties & Knowledge'. Below this, it states 'Job Duties & Knowledge will be evaluated by: Employee, Manager, Other'. A list of 20 job duties is displayed, labeled 'Duty 1' through 'Duty 20', all of which are currently uncategorized.

## Categorized Job Duties

The screenshot shows the 'Performance Process' interface for 'USG Annual Review for Staff'. The left sidebar lists steps: Define Criteria (12/31/2024), Checkpoint 1 (11/01/2024), Finalize Criteria (12/31/2024), Nominate Participants (12/31/2024), Review Participant Evaluations (12/31/2024), Review Self Evaluation (12/31/2024), and Complete Manager Evaluation (12/31/2024). The 'Define Criteria' step is active, showing 'Update and Approve' as the current task. The main content area is titled 'Define Criteria - Update and Approve' and shows 'Section 2 - Job Duties & Knowledge'. Below this, it states 'Job Duties & Knowledge will be evaluated by: Employee, Manager, Other'. A list of job duties is displayed, categorized into: 'Employee Administration & Support', 'Recruiting and Onboarding', and 'Benefits Administration'. At the bottom, a 'Job Duties & Knowledge Summary' section shows 'Section Weight' set to 40% (not less than 40%).

# Define Criteria: Review Job duties (cont.)

Performance Process

Performance Process Settings «

Steps and Tasks Refresh Filter

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024  
**Update and Approve**
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

**Define Criteria - Update and Approve** Print | Notify | Export

Tiffany Leslie  
[Actions](#)

Job Title	Human Resources Generalist	Manager	Pamela Booker
Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
Template	Staff-No Add/No Aprl/Inst Val	Document ID	35150
Status	In Progress	Due Date	12/31/2024

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

Goals **Job Duties** Performance Factors Values

Section 2 - Job Duties & Knowledge

Job Duties & Knowledge will be evaluated by: Employee, Manager, Other  
[Expand](#) | [Collapse](#)

Employee Administration & Support

**Description** : Manages and updates all employee transactions in the HRIS to ensure accurate pay and benefits for employees. Maintain employee personnel files to ensure compliance with record-keeping policies. Counsel employees on various HR topics and functions; communicates and shares an understanding of institution policies and procedures, employment laws, standards and other government regulations. Conducts off-boarding of employees to include exit interviews. Participates in developing departmental guidelines and procedures.

Created By Profile 03/18/2024 10:27AM

Recruiting and Onboarding

# Define Criteria: Review Performance Factors

The screenshot shows a web application interface for defining performance criteria. The main title is "Performance Process". The current view is "USG Annual Review for Staff" with "Define Criteria - Update and Approve" selected. The interface includes a sidebar with a task list, a main content area with a list of performance factors, and a summary section at the bottom.

**Performance Process**

Performance Process Settings Back

Steps and Tasks Refresh Dropdown

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024  
**Update and Approve**
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

**USG Annual Review for Staff** Save Approve

**Define Criteria - Update and Approve** Print Notify Export

Section 3 - Performance Factors

Performance Factors will be evaluated by: Employee, Manager, Other  
[Expand](#) | [Collapse](#)

- > Communication
- > Customer Service
- > Initiative
- > Innovation
- > Job Knowledge
- > Adherence to University Policies
- > Quality of Work
- > Interpersonal Relationships
- > Reliability/Attendance
- > Critical Thinking

Section 3 - Performance Factors Summary

Section Weight  % (not less than 20%)

# Define Criteria: Review MGA Core Values

Performance Process

Performance Process Settings Back

Steps and Tasks Refresh Dropdown

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024  
**Update and Approve**
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff Save Approve

### Define Criteria - Update and Approve

[Print](#) | [Notify](#) | [Export](#)

Tiffany Leslie  
[Actions](#)

	Job Title	Human Resources Generalist	Manager	Pamela Booker
	Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
	Template	Staff-No Add/No Aprvl/Inst Val	Document ID	35150
	Status	In Progress	Due Date	12/31/2024

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

Goals   Job Duties   Performance Factors   **Values**

#### Section 4 - Values

Values will be evaluated by: Employee, Manager, Other  
[Expand](#) | [Collapse](#)

- > **Adaptability**
- > **Engagement**
- > **Learning**
- > **Stewardship**

#### Values Summary

Section Weight	<input type="text" value="15"/>	% (not less than 15%)
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# Define Criteria: Confirm and Approve Criteria

The screenshot displays a web application interface for a performance process. The main header is "Performance Process" with a "Save" button and an "Approve" button circled in red. The left sidebar shows a "Steps and Tasks" list with "Update and Approve" highlighted. The main content area is titled "Define Criteria - Update and Approve" and shows details for Tiffany Leslie, including Job Title (Human Resources Generalist), Manager (Pamela Booker), and Document Type (USG Annual Review for Staff). A modal dialog titled "Approve Performance Criteria" is open, containing the text "Select confirm to approve and complete the Define Criteria Step." and two buttons: "Confirm" (circled in red) and "Cancel". Below the dialog, the interface shows "Section 4 - Values" with a list of evaluation criteria including "Adaptability" and "Engagement".

**Performance Process**

USG Annual Review for Staff

**Define Criteria - Update and Approve**

Tiffany Leslie

Job Title: Human Resources Generalist  
Manager: Pamela Booker  
Document Type: USG Annual Review for Staff  
Period: 01/01/2024 - 12/31/2024  
Template: Staff-No Add/No Aprvl/Inst Val  
Document ID: 35150  
Status: In Progress  
Due Date: 12/31/2024

**Approve Performance Criteria**

Select confirm to approve and complete the Define Criteria Step.

Confirm Cancel

**Section 4 - Values**

Values will be evaluated by: Employee, Manager, Other

**Adaptability**

**Engagement**

**Description** : Recognizing that learning is a social activity and that we cannot fulfill our mission of public higher education without collaborating with those on our campuses and outside our doors in our communities.

Created By Profile 03/18/2024 10:27AM

**Learning**

# Define Criteria: Confirm and Approve Criteria (cont.)

The screenshot shows a mobile application interface for a performance process. At the top, there is a navigation bar with a back arrow, a clock icon, and a heart icon. Below this is a header for 'Performance Process'. The main content is split into two panels. The left panel, titled 'Performance Process', shows the user 'Tiffany Leslie' and the process 'USG Annual Review for Staff' with dates '01/01/2024 - 12/31/2024' and an 'Overview' link. A list of steps follows: 'Define Criteria' (completed with a green checkmark and due date 12/31/2024), 'Checkpoint 1' (due date 11/01/2024), 'Finalize Criteria' (due date 12/31/2024), 'Nominate Participants' (due date 12/31/2024), 'Review Participant Evaluations' (due date 12/31/2024), 'Review Self Evaluation' (due date 12/31/2024), and 'Complete Manager Evaluation' (due date 12/31/2024). The right panel, titled 'USG Annual Review for Staff', displays a confirmation message: 'Confirmation - Performance Criteria Approved' followed by a green checkmark and the text 'You have successfully approved and completed the Define Criteria Step.'

**Checkpoint 1:** Click on “Checkpoint 1” on left side of the screen. Then select “Update and Share”

The screenshot displays the 'Performance Process' interface. On the left, a sidebar lists several steps in a process. The 'Checkpoint 1' step is highlighted with a red rectangular box. Within this box, the 'Update and Share' sub-step is highlighted with a yellow background. The right side of the interface shows a confirmation message: 'Confirmation - Performance Criteria Approved' with a green checkmark icon and the text 'You have successfully approved and completed the Define Criteria Step.'

**Performance Process**

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1**  
Due Date 11/01/2024
  - Update and Share**  
Review with Employee
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

**Confirmation - Performance Criteria Approved**

✔ You have successfully approved and completed the Define Criteria Step.

# Checkpoint 1: Add Manager Comments on Goals and Goals Summary

**Performance Process**

Performance Process Save Skip Checkpoint Share with Employee

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date: 12/31/2024
- Checkpoint 1  
Due Date: 11/01/2024
  - Update and Share**  
Review with Employee
- Finalize Criteria  
Due Date: 12/31/2024
- Nominate Participants  
Due Date: 12/31/2024
- Review Participant Evaluations  
Due Date: 12/31/2024
- Review Self Evaluation  
Due Date: 12/31/2024
- Complete Manager Evaluation  
Due Date: 12/31/2024

**USG Annual Review for Staff**

**Checkpoint 1 - Update and Share** Print Notify Export

Tiffany Leslie  
Actions

	Job Title: Human Resources Generalist	Manager: Pamela Booker
	Document Type: USG Annual Review for Staff	Period: 01/01/2024 - 12/31/2024
	Template: Staff-No Add/No Aprvl/Inst Val	Document ID: 35150
	Status: In Progress	Due Date: 11/01/2024

Your comments are currently not shared with your employee

1. Enter your comments on the employees progress against their performance criteria.
2. When ready select the Share with Employee button save your changes and notify the employee your comments have been shared. This can be done before or after you meet with the employee to discuss their progress.
3. Once you have shared your comments and had a discussion select the Complete Checkpoint button to mark this step as complete.

**Goals** | Job Duties | Performance Factors | Values | Overall Summary

Section 1 - Goals

Goals will be evaluated by: Employee, Manager, Other

[Expand](#) | [Collapse](#) | [Add Item](#)

Goal 1

Description: Enter description of the Goal Copy Edit Delete

- Start Date: 01/01/2024
- End Date: 12/31/2024

Manager Comments

Comments on Goals

Created By: Pamela Booker 03/25/2024 11:51AM

# Checkpoint 1: Add Manager Comments on Goals and Goals Summary (cont.)

**Performance Process**

Performance Process Save Skip Checkpoint Share with Employee

USG Annual Review for Staff

**Checkpoint 1 - Update and Share** Print Notify Export

**Goal 1**

Description : Enter description of the Goal

- Start Date : 01/01/2024
- End Date : 12/31/2024

Manager Comments

Comments on Goals

Created By Pamela Booker 03/25/2024 11:51AM

**Goals Summary**

Section Weight 25 % (not less than 25%)

Manager Comments

Overall Goal Comments

**Audit History**

Created By	Ruby Ronca	03/18/2024 10:27:06AM
Approved By	Pamela Booker	03/25/2024 12:00:12PM
Last Modified By	Pamela Booker	03/25/2024 12:00:12PM

# Checkpoint 1: Choose “Share with Employee” from the top menu.

The screenshot displays a web application interface for a performance review process. The main header is "Performance Process" with navigation icons. Below the header, there are three buttons: "Save", "Skip Checkpoint", and "Share with Employee", with the latter being circled in red. The left sidebar shows a "Steps and Tasks" list with "Update and Share" highlighted. The main content area is titled "Checkpoint 1 - Update and Share" and shows details for "USG Annual Review for Staff" for employee Tiffany Leslie. A "Share Comments" dialog box is open in the center, with the "Confirm" button circled in red. The dialog box contains the text "Select confirm to share your comments with the employee." and two buttons: "Confirm" and "Cancel".

**Performance Process**

USG Annual Review for Staff

Save Skip Checkpoint **Share with Employee**

Print | Notify | Export

**Checkpoint 1 - Update and Share**

Tiffany Leslie

Job Title: Human Resources Generalist | Manager: Pamela Booker

Document Type: USG Annual Review for Staff | Period: 01/01/2024 - 12/31/2024

Template: Staff-No Add/No Aprvl/Inst Val | Document ID: 35150

Status: In Progress | Due Date: 11/01/2024

Your comments are currently not shared with your employee

1. Enter your comments on the employees progress against their performance criteria.  
2. When ready select the Share with Employee button save your changes and notify the employee your comments have been shared. This can be done before or after you meet with the employee to discuss their performance.  
3. Once you have shared your comments you will receive a notification to complete the review process as complete.

Select confirm to share your comments with the employee.

**Confirm** Cancel

Section 5 - Overall Summary

Overall Summary will be evaluated by:

Audit History

Created By	Ruby Ronca	03/18/2024 10:27:06AM
Approved By	Pamela Booker	03/25/2024 12:00:12PM
Last Modified By	Pamela Booker	03/25/2024 12:00:12PM

# Checkpoint 1: Choose “Share with Employee” from the top menu. (cont.)

The screenshot shows a web application interface for a performance process. The main header is "Performance Process". Below it, there is a sub-header "Performance Process" with a refresh icon and a double arrow icon. A "Steps and Tasks" sidebar on the left lists several steps with due dates. The "Update and Share" step under "Checkpoint 1" is highlighted in yellow. The main content area displays "USG Annual Review for Staff" and a confirmation message: "Confirmation - Comments Shared with Employee" with a green checkmark and the text "Your comments are shared." The browser's address bar at the bottom shows a JavaScript action: `javascript:submitAction_win25(document.win25,'EP_BTN_LINK_WRK_EP_HELP_PB');`

**Performance Process**

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
  - Update and Share
  - Review with Employee
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

**Confirmation - Comments Shared with Employee**

✔ Your comments are shared.

`javascript:submitAction_win25(document.win25,'EP_BTN_LINK_WRK_EP_HELP_PB');`

# Checkpoint 1: Click “Complete Checkpoint” when done sharing the checkpoint with the employee

The screenshot displays a web application interface for a performance review process. The main header is "Performance Process" with a sub-header "USG Annual Review for Staff". In the top right corner, there are buttons for "Save", "Skip Checkpoint", "Stop Sharing", and "Complete Checkpoint", with the latter being circled in red. The left sidebar shows a "Steps and Tasks" list with "Review with Employee" highlighted. The main content area is titled "Checkpoint 1 - Review with Employee" and shows details for Tiffany Leslie, including her job title "Human Resources Generalist", manager "Pamela Booker", and document ID "35150". A dialog box titled "Complete Checkpoint" is open in the center, with the text "Select confirm to indicate a review was held with the employee and this checkpoint is complete." and two buttons, "Confirm" and "Cancel", with "Confirm" circled in red. Below the dialog, the interface shows sections for "Goals", "Job Duties", and "Performance", with "Section 1 - Goals" expanded to show "Goal 1" and a "Goals Summary" section with a text editor for "Manager Comments" and "Overall Goal Comments".

# Checkpoint 1: "Complete Checkpoint" (cont.)

The screenshot displays a mobile application interface for a performance process. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a home icon. Below this, the main header reads "Performance Process".

The interface is split into two main sections. On the left, a sidebar titled "Performance Process" contains a sub-section "Steps and Tasks". Under this, the user's name "Tiffany Leslie" and the task "USG Annual Review for Staff" are listed, along with the dates "01/01/2024 - 12/31/2024" and an "Overview" link. A list of seven tasks follows, each with a status indicator and a due date:

- Define Criteria (Completed, Due Date: 12/31/2024)
- Checkpoint 1 (Completed, Due Date: 11/01/2024)
- Finalize Criteria (Pending, Due Date: 12/31/2024)
- Nominate Participants (Pending, Due Date: 12/31/2024)
- Review Participant Evaluations (Pending, Due Date: 12/31/2024)
- Review Self Evaluation (Pending, Due Date: 12/31/2024)
- Complete Manager Evaluation (Pending, Due Date: 12/31/2024)

The right section of the interface is titled "USG Annual Review for Staff" and features a prominent heading "Confirmation - Completed". Below this heading, a green checkmark icon is followed by the text: "You have successfully marked that this checkpoint as complete."

**Finalize Criteria:** Click on “Finalize Criteria” on left side of the screen. Then select “Update and Complete”

The screenshot shows a mobile application interface for a 'Performance Process'. The top navigation bar includes a back arrow, a clock icon, a heart icon, and a home icon. The main header is 'Performance Process'. Below this, there is a sub-header 'Performance Process' with a settings gear icon and a back arrow. The main content area is titled 'USG Annual Review for Staff' and shows a 'Confirmation - Completed' message: 'You have successfully marked that this checkpoint as complete.' On the left side, there is a list of tasks under the heading 'Steps and Tasks'. The tasks are: 'Define Criteria' (Due Date: 12/31/2024), 'Checkpoint 1' (Due Date: 11/01/2024), 'Finalize Criteria' (Due Date: 12/31/2024), 'Nominate Participants' (Due Date: 12/31/2024), 'Review Participant Evaluations' (Due Date: 12/31/2024), 'Review Self Evaluation' (Due Date: 12/31/2024), and 'Complete Manager Evaluation' (Due Date: 12/31/2024). The 'Finalize Criteria' task is highlighted with a red box, and its sub-option 'Update and Complete' is highlighted with a yellow box.

**Performance Process**

**Performance Process**

**Steps and Tasks**

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- ▶  Define Criteria  
Due Date 12/31/2024
- ▶  Checkpoint 1  
Due Date 11/01/2024
- ▼  Finalize Criteria  
Due Date 12/31/2024
  - Update and Complete
- ▶  Nominate Participants  
Due Date 12/31/2024
- ▶  Review Participant Evaluations  
Due Date 12/31/2024
- ▶  Review Self Evaluation  
Due Date 12/31/2024
- ▶  Complete Manager Evaluation  
Due Date 12/31/2024

**USG Annual Review for Staff**

**Confirmation - Completed**

✔ You have successfully marked that this checkpoint as complete.

# Finalize Criteria: Update Manager Comments on Goals and Goals Summary if needed.

The screenshot displays a web application interface for a performance review process. The main header is 'Performance Process' with navigation icons. Below it, the current review is identified as 'USG Annual Review for Staff' for 'Tiffany Leslie', with a period from 01/01/2024 to 12/31/2024. The 'Steps and Tasks' sidebar on the left lists several steps, with 'Finalize Criteria' and its sub-step 'Update and Complete' highlighted in yellow. The main content area is titled 'Finalize Criteria - Update and Complete' and includes buttons for 'Save', 'Share with Employee', and 'Complete'. It also has 'Print', 'Notify', and 'Export' options. The content is organized into sections: 'Section 1 - Goals', 'Goal 1', and 'Goals Summary'. The 'Goal 1' section is highlighted with a red border and contains a 'Description' field with a placeholder 'Enter description of the Goal', a list of dates (Start Date: 01/01/2024, End Date: 12/31/2024), a 'Manager Comments' text area with a rich text editor toolbar, and a 'Created By' field showing 'Pamela Booker' on '03/25/2024 11:51AM'. The 'Goals Summary' section also features a 'Section Weight' of 25% (not less than 25%) and a 'Manager Comments' text area with a rich text editor toolbar. At the bottom, there is an 'Audit History' section.

# Finalize Criteria: Choose "Complete" from the top menu after making final review.

The screenshot displays a web application interface for a performance review process. The main header is "Performance Process". On the left, a sidebar lists "Steps and Tasks" with "Finalize Criteria" selected and its sub-step "Update and Complete" highlighted. The main content area is titled "Finalize Criteria - Update and Complete" and shows details for "USG Annual Review for Staff" for employee "Tiffany Leslie". A table lists fields: Job Title (Human Resources Generalist), Manager (Pamela Booker), Document Type (USG Annual Review for Staff), Period (01/01/2024 - 12/31/2024), Template (Staff-No Add/No Aprvl/Inst Val), Document ID (35150), Status (In Progress), and Due Date (12/31/2024). A message states: "Your comments are currently not shared with your employee. Just prior to starting the final evaluation update the performance criteria if necessary and select the Complete button if applicable." A modal dialog box titled "Finalize Criteria" is centered, asking to "Select confirm to complete the Finalize Criteria Step." with "Confirm" and "Cancel" buttons. The "Complete" button in the top right of the main interface is circled in red. At the bottom, it shows "Created By Ruby Ronca" and "03/18/2024 10:27:06AM".

# Finalize Criteria: "Complete" (cont.)

The screenshot shows a mobile application interface for a performance process. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a home icon. Below the navigation bar is a header for "Performance Process".

The main content area is divided into two panels. The left panel, titled "Performance Process", shows the user's name "Tiffany Leslie" and the process name "USG Annual Review for Staff" with the dates "01/01/2024 - 12/31/2024" and an "Overview" link. A list of steps is shown, each with a status icon and a due date:

- Define Criteria (Completed, Due Date: 12/31/2024)
- Checkpoint 1 (Completed, Due Date: 11/01/2024)
- Finalize Criteria (Completed, Due Date: 12/31/2024)
- Nominate Participants (Not Started, Due Date: 12/31/2024)
- Review Participant Evaluations (Not Started, Due Date: 12/31/2024)
- Review Self Evaluation (Not Started, Due Date: 12/31/2024)
- Complete Manager Evaluation (Not Started, Due Date: 12/31/2024)

The right panel, titled "USG Annual Review for Staff", displays a confirmation message: "Confirmation - Criteria Finalized" followed by "You have successfully completed the Finalize Criteria Step."

**Nominate Participants (Optional):** Click “Nominate Participants” ONLY if inviting someone to participate in the evaluation (i.e. previous supervisor). **SKIP THIS SECTION** if not inviting anyone else to comment on the evaluation. If nominating participants, then select “Add Nominees”

The screenshot shows a web interface for a performance process. The main header is "Performance Process". Below it, the specific process is identified as "USG Annual Review for Staff". The current step is "Confirmation - Criteria Finalized", with a message: "You have successfully completed the Finalize Criteria Step." On the left, a sidebar lists the steps and tasks. The "Nominate Participants" step is highlighted with a red box. This step includes the following sub-tasks: "Add Nominees" and "Track Nominations".

**Performance Process**

**Performance Process** ⚙️ ⏪

**Steps and Tasks** 🔄 ⌵

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- ✔️ Define Criteria  
Due Date 12/31/2024
- ✔️ Checkpoint 1  
Due Date 11/01/2024
- ✔️ Finalize Criteria  
Due Date 12/31/2024
- 🔴 **Nominate Participants**  
Due Date 12/31/2024  
[Add Nominees](#)  
[Track Nominations](#)
- ⊙ Review Participant Evaluations  
Due Date 12/31/2024
- ⊙ Review Self Evaluation  
Due Date 12/31/2024
- ⊙ Complete Manager Evaluation  
Due Date 12/31/2024

**USG Annual Review for Staff**

**Confirmation - Criteria Finalized**

✔️ You have successfully completed the Finalize Criteria Step.

**Nominate Participants (Optional):** Click on “Search”. The Document ID is for the ID of the current Performance evaluation open.

The screenshot shows a web application interface for a 'Performance Process'. On the left, a sidebar lists 'Steps and Tasks' for 'Tiffany Leslie' regarding a 'USG Annual Review for Staff' from 01/01/2024 to 12/31/2024. The tasks include 'Define Criteria', 'Checkpoint 1', 'Finalize Criteria', 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Nominate Participants' task is currently active. The main content area is titled 'Nominate Participant (Hidden)' and contains a 'Find an Existing Value' section. This section includes a 'Search Criteria' dropdown, a text input field for search criteria, and two search history dropdowns labeled 'Recent Searches' and 'Saved Searches'. Below these is a search form with a 'Search by:' dropdown set to 'Document ID', an equals sign, and a text input field containing '35150'. A 'Show more options' link is visible below the search by dropdown. Two buttons, 'Search' and 'Clear', are positioned below the search input. The 'Search' button is circled in red. Below the search form is an illustration of a person with a magnifying glass over a globe, and the text 'Nothing yet. Your search results will appear here.'

# Nominate Participants (Optional): Click on “Add Other”.

The screenshot displays a web application interface for a performance process. On the left, a sidebar lists the process steps: Define Criteria, Checkpoint 1, Finalize Criteria, Nominate Participants, Review Participant Evaluations, Review Self Evaluation, and Complete Manager Evaluation. The 'Nominate Participants' step is currently active. The main content area shows details for 'Tiffany Leslie', including her job title 'Human Resources Generalist', manager 'Pamela Booker', and document type 'USG Annual Review for Staff'. Below this, a section titled 'Participant Role: Other' indicates a minimum of 1 and maximum of 1 nomination. A 'Nominations' box states 'Currently there are no nominees in your nomination list.' At the bottom of this box, a blue button with a plus sign and the text 'Add Other' is circled in red, indicating the action to be taken.

# Nominate Participants (Optional): Search for who nominee to add as a Participant.

USG Annual Review for Staff  
Nominate Participants - Add Nominees

**Tiffany Leslie**  
Actions ▾

 Job Title: Human Resources Generalist      Manager: Pamela Booker  
Document Type: USG Annual Review for Staff      Period: 01/01/2024 - 12/31/2024  
Template: Staff-No Add/No Aprvl/Inst Val      Document ID: 35150  
Status: In Progress      Due Date: 12/31/2024

Part  
Nominate  
Current  
Add

### Person Search

Add New Participants

Nominate Participants

▶ Instructions

**Search Criteria**

Name: SYLVIA  
Last Name: REGISTER  
Second Last Name:   
First Name:   
**Search**

**Search Results**

Sylvia Register 

OK

[Return to Previous Page](#)

USG Annual Review for Staff  
Nominate Participants - Add Nominees

**Tiffany Leslie**  
Actions ▾

 Job Title: Human Resources Generalist      Manager: Pamela Booker  
Document Type: USG Annual Review for Staff      Period: 01/01/2024 - 12/31/2024  
Template: Staff-No Add/No Aprvl/Inst Val      Document ID: 35150  
Status: In Progress      Due Date: 12/31/2024

Participant Role: Other      Minimum Required: 1      Maximum Available: 1

Nominations  
Currently there are

 Add Other

### Person Search

Add New Participants

Details for Sylvia Register

**Personal Data**

Description: Employee

**Personal Data Details**

Type	EMP	Active
Department	1615000	Human Resources
Location	MAC	MGA - Macon

**Select This Person**

[Return to List](#)

# Nominate Participants (Optional): Nominees will be listed after they have been added.

The screenshot displays a web application interface for a performance process. The main header is "Performance Process". Below it, the current process is identified as "USG Annual Review for Staff". The current step is "Nominate Participants - Add Nominees".

**Performance Process**  
USG Annual Review for Staff  
Nominate Participants - Add Nominees

**Steps and Tasks**

- Define Criteria (Due Date: 12/31/2024)
- Checkpoint 1 (Due Date: 11/01/2024)
- Finalize Criteria (Due Date: 12/31/2024)
- Nominate Participants** (Due Date: 12/31/2024)
  - Add Nominees
  - Track Nominations
- Review Participant Evaluations (Due Date: 12/31/2024)
- Review Self Evaluation (Due Date: 12/31/2024)
- Complete Manager Evaluation (Due Date: 12/31/2024)

**Tiffany Leslie**  
Actions

**Job Title:** Human Resources Generalist  
**Document Type:** USG Annual Review for Staff  
**Template:** Staff-No Add/No Aprvl/Inst Val  
**Status:** In Progress

**Manager:** Pamela Booker  
**Period:** 01/01/2024 - 12/31/2024  
**Document ID:** 35150  
**Due Date:** 12/31/2024

**Participant Role:** Other (Minimum Required: 1, Maximum Available: 1)

Nominations	
Nominee	Delete
Sylvia Register	

[+ Add Other](#)

**Nominate Participants (Optional):** Click “Submit Nominations” and the nominees will be added to the Evaluation.

The screenshot displays a web application interface for a performance process. The main header is "Performance Process". Below it, the current process is identified as "USG Annual Review for Staff". In the top right corner, there are two buttons: "Save" and "Submit Nominations", with the latter being circled in red. The left sidebar lists the "Steps and Tasks" for the process, including "Define Criteria", "Checkpoint 1", "Finalize Criteria", "Nominate Participants", "Review Participant Evaluations", "Review Self Evaluation", and "Complete Manager Evaluation". The "Nominate Participants" step is currently active. The main content area shows details for a participant named "Tiffany Leslie", including her job title, manager, document type, template, status, and due date. Below this, there is a section for "Participant Role: Other" with a table of "Nominations". The table has columns for "Nominee" and "Delete". One nominee, "Sylvia Register", is listed. A "Submit Nominations" dialog box is open in the foreground, containing the text "Select confirm to submit nomination requests to the listed nominee's." and two buttons: "Confirm" (circled in red) and "Cancel".

# Nominate Participants (Optional): "Submit Nominations" (cont.)

The screenshot shows a mobile application interface with a dark top navigation bar containing icons for back, clock, heart, home, notifications, and a menu. Below the navigation bar is a header for "Performance Process".

The main content area is split into two columns. The left column is a sidebar for "Performance Process" with a settings gear and back arrow. It lists "Steps and Tasks" for "Tiffany Leslie" under the "USG Annual Review for Staff" process, with dates "01/01/2024 - 12/31/2024" and an "Overview" link. The task list includes:

- Define Criteria (Due Date: 12/31/2024)
- Checkpoint 1 (Due Date: 11/01/2024)
- Finalize Criteria (Due Date: 12/31/2024)
- Nominate Participants (Due Date: 12/31/2024)
- Review Participant Evaluations (Due Date: 12/31/2024)
- Review Self Evaluation (Due Date: 12/31/2024)
- Complete Manager Evaluation (Due Date: 12/31/2024)

The right column displays the "Confirmation - Nominations Submitted" screen for "USG Annual Review for Staff". It contains the text: "You have submitted the nominations. You can track the nominees responses by selecting the Track Nominations hyperlink under Nominate Participants."

**Nominate Participants (Optional):** Click “Track Nominations” to view if Nominee has accepted or declined the offer.

The screenshot shows a mobile application interface for a 'Performance Process'. The top navigation bar includes a back arrow, a clock icon, a heart icon, and a home icon. Below the navigation bar, the title 'Performance Process' is displayed. The main content area is divided into two sections. On the left, there is a sidebar menu titled 'Performance Process' with a settings gear icon and a back arrow. Underneath, the section 'Steps and Tasks' is shown, listing several tasks with their due dates. The task 'Nominate Participants' is highlighted with a red box and includes sub-options 'Add Nominees' and 'Track Nominations'. On the right, the main content area is titled 'USG Annual Review for Staff' and 'Confirmation - Criteria Finalized'. A green checkmark icon is followed by the text: 'You have successfully completed the Finalize Criteria Step.'

**Performance Process**

**Performance Process** ⚙️ ⏪

**Steps and Tasks** 🔄 ⚙️ ▼

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

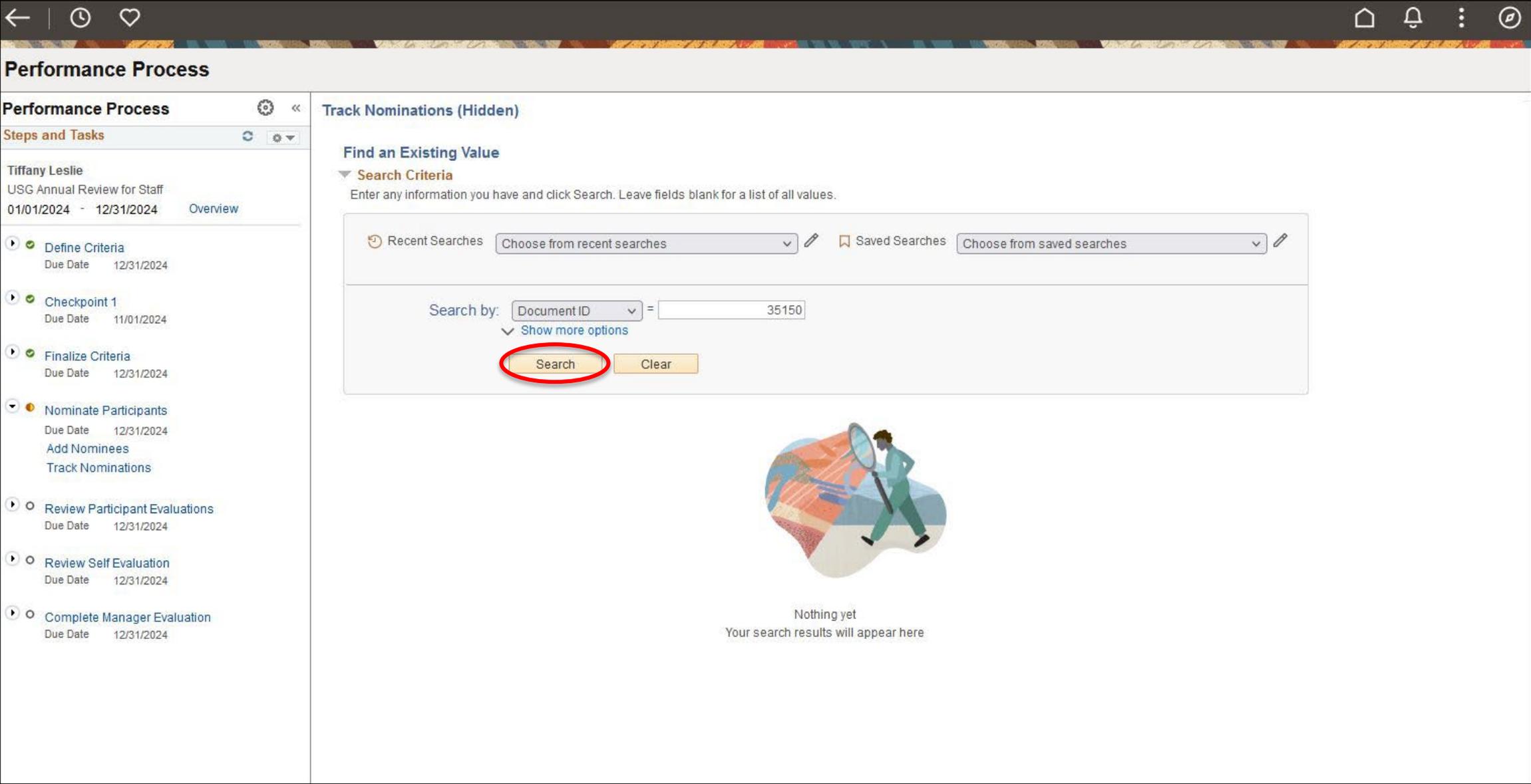
- ▶️ ✅ **Define Criteria**  
Due Date 12/31/2024
- ▶️ ✅ **Checkpoint 1**  
Due Date 11/01/2024
- ▶️ ✅ **Finalize Criteria**  
Due Date 12/31/2024
- ▶️ ⚠️ **Nominate Participants**  
Due Date 12/31/2024  
[Add Nominees](#)  
[Track Nominations](#)
- ▶️ ⚪ **Review Participant Evaluations**  
Due Date 12/31/2024
- ▶️ ⚪ **Review Self Evaluation**  
Due Date 12/31/2024
- ▶️ ⚪ **Complete Manager Evaluation**  
Due Date 12/31/2024

**USG Annual Review for Staff**

**Confirmation - Criteria Finalized**

✅ You have successfully completed the Finalize Criteria Step.

**Nominate Participants (Optional):** Click on “Search”. The Document ID is for the ID for the current Performance evaluation open.



The screenshot displays the 'Performance Process' interface. On the left, a sidebar lists tasks for 'Tiffany Leslie' under the 'USG Annual Review for Staff' (01/01/2024 - 12/31/2024). The tasks include 'Define Criteria', 'Checkpoint 1', 'Finalize Criteria', 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Nominate Participants' task is currently active, with sub-tasks 'Add Nominees' and 'Track Nominations'.

The main area is titled 'Track Nominations (Hidden)' and contains a 'Find an Existing Value' section. Below this is a 'Search Criteria' section with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two dropdown menus for 'Recent Searches' and 'Saved Searches', both set to 'Choose from recent searches' and 'Choose from saved searches' respectively. Below these is a search input field with 'Search by: Document ID = 35150'. A 'Show more options' link is visible below the input field. The 'Search' button is circled in red, and a 'Clear' button is also present. Below the search area is an illustration of a person with a magnifying glass over a globe, and the text 'Nothing yet Your search results will appear here'.

**Nominate Participants (Optional): “Track Nominations” (cont.).** The Status of the Nominees is seen here. Status can be Pending, Accepted, or Declined.

The screenshot displays a web application interface for a performance process. The main header is "Performance Process". Below it, the current process is identified as "USG Annual Review for Staff" and the specific task is "Nominate Participants - Track Nominations".

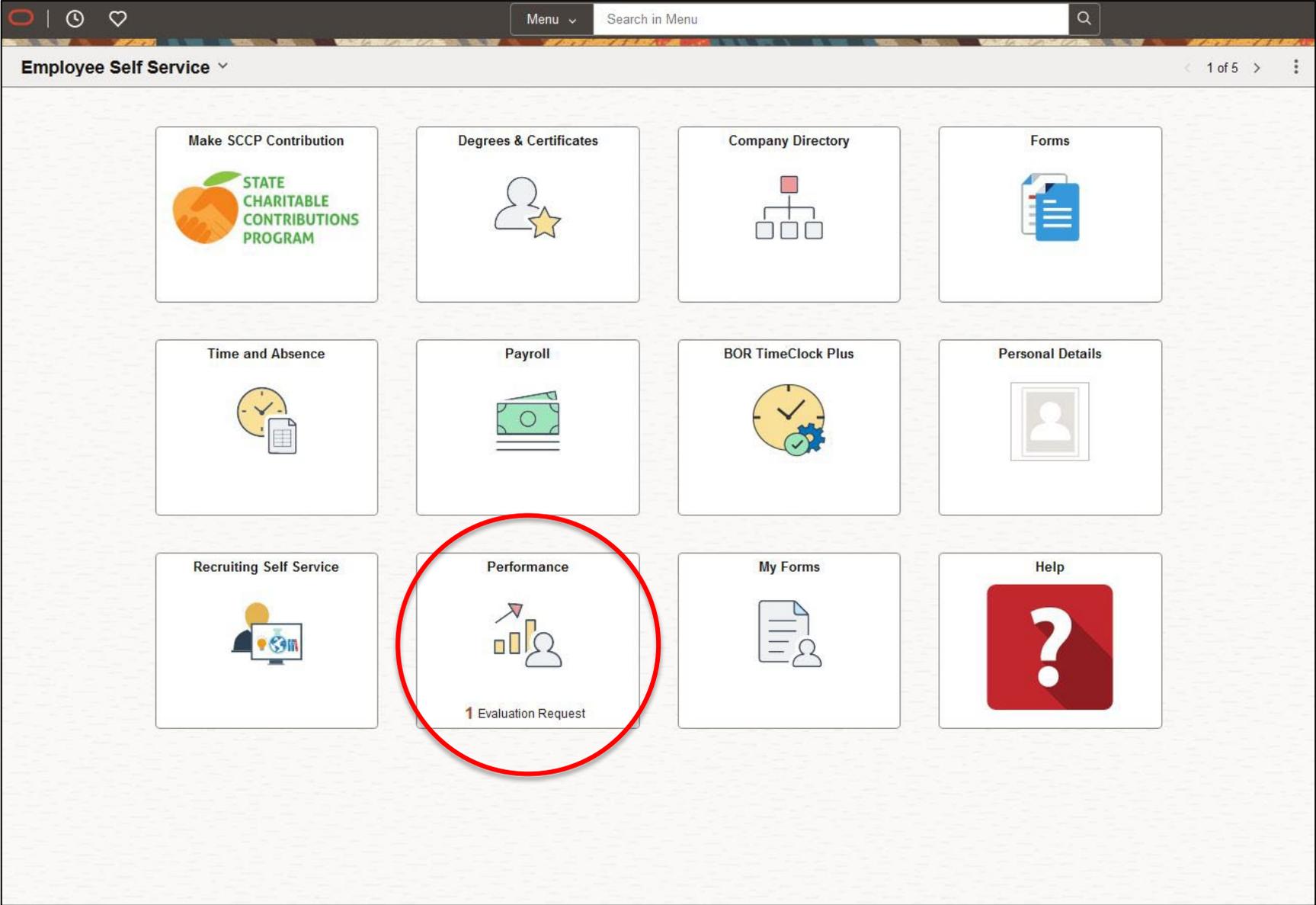
The user profile for Tiffany Leslie is shown, including her job title "Human Resources Generalist", manager "Pamela Booker", and document details. The status of the nomination process is "In Progress".

A table titled "Nominations" is highlighted with a red box. It shows the following data:

Nominee	Status
Sylvia Register	Accepted

The left sidebar contains a list of steps and tasks for the process, including "Define Criteria", "Checkpoint 1", "Finalize Criteria", "Nominate Participants", "Review Participant Evaluations", "Review Self Evaluation", and "Complete Manager Evaluation". The "Nominate Participants" step is currently active.

**Nominate Participants (Optional):** If nominees are selected, nominee will see request in the “Performance” tile in Employee Self Service.



**Nominate Participants (Optional):** In “Evaluations of Others”. The Nominee will see that they have Pending Evaluation Request. They can either “Accept” or “Decline” the request.

The screenshot shows a web application interface for a user named Sylvia Register. The user's profile is displayed at the top left, including their name, title (Payroll & System Implement Mgr), and ID (0151783). The main content area is titled "Evaluations of Others" and contains a table of pending evaluation requests. The table has three columns: Name, Document Type, and Due Date. A single request is listed for Tiffany Leslie, with the document type "USG Annual Review for Staff" and a due date of "12/31/2024". Below the table, there are two buttons: "Accept" and "Decline", which are highlighted with a red box. The interface also includes a search bar at the top and a sidebar on the left with navigation options like "My Current Documents", "My Historical Documents", "Evaluations of Others", and "Historical Evaluations of Others".

**Performance**

**Sylvia Register**   
Payroll & System Implement Mgr  
0151783

My Current Documents 1

My Historical Documents

**Evaluations of Others** 1

Historical Evaluations of Others

**Evaluations of Others**

**Pending Evaluation Requests**

<input type="checkbox"/> Name	Document Type	Due Date
<input type="checkbox"/> Tiffany Leslie	USG Annual Review for Staff	12/31/2024

**Current Evaluations**

No data exists

**Nominate Participants (Optional):** If the request is Accepted, the Evaluation will now look like this.

The screenshot shows a web application interface with a top navigation bar containing a search box labeled "Search in Menu" and navigation icons. Below the navigation bar is a header section titled "Performance" with a user profile for Sylvia Register, Payroll & System Implement Mgr, ID 0151783. A left sidebar menu includes "My Current Documents" (1), "My Historical Documents", "Evaluations of Others" (1), and "Historical Evaluations of Others". The main content area is titled "Evaluations of Others" and features a sub-section "Current Evaluations" with a table of data.

Name	Document Type	Document Status	Period Begin / Period End	
Tiffany Leslie	USG Annual Review for Staff	Not Started	01/01/2024 12/31/2024	>

# Nominate Participants (Optional): Participant will be able to complete an Evaluation for the Employee. They will give ratings and comments on each section. Goals:

Other Evaluation

USG Annual Review for Staff Save Complete

Other Evaluation Print Notify

Tiffany Leslie

	Job Title	Human Resources Generalist	Manager	Pamela Booker
	Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
	Template	Staff-No Add/No Aprv/Inst Val	Document ID	35150
	Status	Evaluation in Progress	Due Date	12/31/2024
	Reviewer	Sylvia Register	Role	Other

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

[Calculate All Ratings](#)

**Goals** | Job Duties | Performance Factors | Values | Overall Summary

Section 1 - Goals

Expand | Collapse

Goal 1

Description : Enter description of the Goal

- Start Date : 01/01/2024
- End Date : 12/31/2024

Rating: 3 - Successful

Comments:   
Completed all tasks effectively and efficiently

Created By: Pamela Booker | 03/25/2024 11:51AM

Audit History

# Nominate Participants (Optional): Participant Evaluation (cont.) Job Duties:

Other Evaluation

USG Annual Review for Staff Save Complete

**Other Evaluation** Print Notify

	Job Title	Human Resources Generalist	Manager	Pamela Booker
	Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
	Template	Staff-No Add/No Aprvl/Inst Val	Document ID	35150
	Status	Evaluation in Progress	Due Date	12/31/2024
	Reviewer	Sylvia Register	Role	Other

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

[Calculate All Ratings](#)

Goals **Job Duties** Performance Factors Values Overall Summary

Section 2 - Job Duties & Knowledge

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

- > Employee Administration & Support
- > Recruiting and Onboarding
- > Benefits Administration

**Job Duties & Knowledge Summary**

Summary Weight	40 %	(not less than 40%)
Rating	3 - Successful	3.00
Comments	<p>Always completed job duties well.</p>	

# Nominate Participants (Optional): Participant Evaluation (cont.)

Only a rating for Performance Factors Summary can be given in this section. Performance Factors:

The screenshot shows a web application interface for 'Other Evaluation'. At the top, there is a navigation bar with 'USG Annual Review for Staff' and buttons for 'Save' and 'Complete'. Below this, the 'Other Evaluation' section is active, with tabs for 'Goals', 'Job Duties', 'Performance Factors', 'Values', and 'Overall Summary'. The 'Performance Factors' tab is selected, showing a list of factors under 'Section 3 - Performance Factors'. The factors listed are: Communication, Customer Service, Initiative, Innovation, Job Knowledge, Adherence to University Policies, Quality of Work, Interpersonal Relationships, Reliability/Attendance, and Critical Thinking. At the bottom, the 'Performance Factors Summary' section is visible, containing a 'Summary Weight' of 20% (not less than 20%) and a 'Rating' dropdown menu set to '3 - Successful'.

Other Evaluation

USG Annual Review for Staff Save Complete

Other Evaluation Print Notify

Goals Job Duties **Performance Factors** Values Overall Summary

Section 3 - Performance Factors

Expand Collapse

- > Communication
- > Customer Service
- > Initiative
- > Innovation
- > Job Knowledge
- > Adherence to University Policies
- > Quality of Work
- > Interpersonal Relationships
- > Reliability/Attendance
- > Critical Thinking

Performance Factors Summary

Summary Weight 20 % (not less than 20%)

Rating 3 - Successful

# Nominate Participants (Optional): Participant Evaluation (cont.) MGA Core Values:

The screenshot shows a web application interface for 'Other Evaluation'. At the top, there are navigation icons (back, refresh, home) and a title bar. Below the title bar, there are 'Save' and 'Complete' buttons. The main content area is titled 'Other Evaluation' and includes a 'Calculate All Ratings' button. A navigation menu shows 'Goals', 'Job Duties', 'Performance Factors', 'Values' (selected), and 'Overall Summary'. The 'Values' section is expanded to show 'Section 4 - Values', with sub-sections for 'Adaptability', 'Engagement', 'Learning', and 'Stewardship'. The 'Engagement' section is active, displaying a description: 'Recognizing that learning is a social activity and that we cannot fulfill our mission of public higher education without collaborating with those on our campuses and outside our doors in our communities.' Below the description, there is a 'Rating' dropdown set to '3 - Successful' with a value of '3.00'. A 'Comments' text area contains the text: 'Always bringing new ideas to the table that help our departments overall mission.' At the bottom of the 'Engagement' section, it shows 'Created By: Profile' and '03/18/2024 10:27AM'. A 'Values Summary' section at the bottom shows a 'Summary Weight' of '15 % (not less than 15%)' and a 'Rating' of '3 - Successful' with a value of '3.00'.

# Nominate Participants (Optional): Participant Evaluation (cont.) Click “Calculate All Ratings” before completing this section. Overall Summary :

Other Evaluation

USG Annual Review for Staff Save Complete

Other Evaluation Print Notify

Tiffany Leslie

Job Title	Human Resources Generalist	Manager	Pamela Booker
Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
Template	Staff-No Add/No Aprvl/Inst Val	Document ID	35150
Status	Evaluation in Progress	Due Date	12/31/2024
Reviewer	Sylvia Register	Role	Other

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

**Calculate All Ratings**

Goals Job Duties Performance Factors Values **Overall Summary**

Section 5 - Overall Summary

Rating 3 - Successful 2.55

Comments ↶ ↷ A A A B *I* U ☰ ☰ ☰ ☰

Great Employee who works hard and completes tasks accurately and efficiently

Audit History

Created By	Ruby Ronca	03/18/2024 10:27:06AM
Last Modified By	Sylvia Register	03/25/2024 12:32:50PM

**Nominate Participants (Optional): Participant Evaluation (cont.)** Click on “Complete” in the top right corner when the evaluation has been completed:

**Other Evaluation**

USG Annual Review for Staff

Save Complete

Print | Notify

**Other Evaluation**

Tiffany Leslie

Job Title: Human Resources Generalist  
Manager: Pamela Booker  
Document Type: USG Annual Review for Staff  
Period: 01/01/2024 - 12/31/2024  
Template: Staff-No Add/No Aprvl/Inst Val  
Document ID: 35150  
Status: Evaluation in Progress  
Due Date: 12/31/2024  
Reviewer: Sylvia Register  
Role: Other

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Calculate All Ratings

Goals Job Duties Performance Factors Values **Overall Summary**

Section 5 - Overall Summary

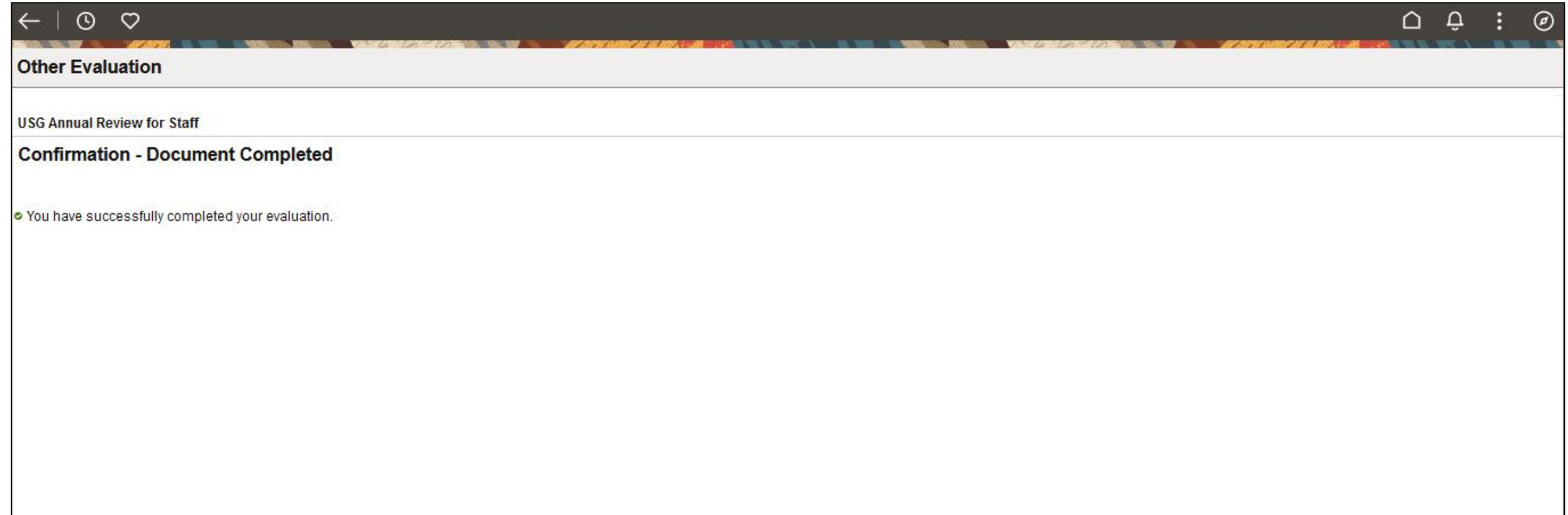
Rating: 3 - Successful 2.55

Comments: Great Employee who works hard and completes tasks accurately and efficiently

Audit History

Created By: Ruby Ronca 03/18/2024 10:27:06AM  
Last Modified By: Sylvia Register 03/25/2024 12:32:50PM

# Nominate Participants (Optional): “Complete” (cont.)



**Nominate Participants (Optional):** Once completed the Evaluation will move in to the “Historical Evaluations of Others” tab for the Participant.

← | 🕒 | ❤️ | 🔍 Search in Menu | 🏠 | ⋮ | 🔄

**Performance**

 **Sylvia Register** ⌵  
Payroll & System Implement Mgr  
0151783

- My Current Documents 1
- My Historical Documents
- Evaluations of Others 0
- Historical Evaluations of Others**

**Historical Evaluations of Others**

Name	Document Type	Document Status	Period Begin / Period End	
Tiffany Leslie	USG Annual Review for Staff	Completed	01/01/2024 12/31/2024	>

**Nominate Participants (Optional):** Once completed the Participant has completed their Evaluation, the Supervisor will select “Review Participant Evaluation” and click on “View

The screenshot displays a mobile application interface for a 'Performance Process'. At the top, there is a header 'Performance Process' with a settings gear icon and a back arrow. Below this is a sub-header 'Steps and Tasks' with a refresh icon and a dropdown arrow. The main content area shows the name 'Tiffany Leslie' and the title 'USG Annual Review for Staff' for the period '01/01/2024 - 12/31/2024', with an 'Overview' link. A list of tasks follows, each with a status icon, a title, and a due date. The 'Review Participant Evaluations' task is highlighted with a red rectangular box. Below it, the 'Complete Manager Evaluation' task has a yellow highlight under its 'Update and Share' sub-item.

Task Name	Due Date	Sub-items
Define Criteria	12/31/2024	
Checkpoint 1	11/01/2024	
Finalize Criteria	12/31/2024	
Nominate Participants	12/31/2024	Add Nominees Track Nominations
<b>Review Participant Evaluations</b>	12/31/2024	<b>View</b>
Review Self Evaluation	12/31/2024	
Complete Manager Evaluation	12/31/2024	Update and Share Pending Acknowledgement

# Nominate Participants (Optional): “Review Participant Evaluation” (cont.) Search using the preloaded Document ID. Then, Select the Participant Evaluation to view

The screenshot shows a software interface for a 'Performance Process'. On the left, a sidebar lists steps: Define Criteria, Checkpoint 1, Finalize Criteria, Nominate Participants, Review Participant Evaluations, Review Self Evaluation, and Complete Manager Evaluation. The 'Review Participant Evaluations' step is active, with a 'View' button. The main area is titled 'Track Nominations (Hidden)' and contains a search section. The search criteria are set to 'Document ID' with the value '35150'. A 'Participant Evaluation' modal window is open, displaying a table with one row: 'Sylvia Register' (Role: Other, Status: Completed, Due Date: 12/31/2024). The 'Sylvia Register' cell is highlighted with a red box. A 'Return' button is located below the table.

**Performance Process**

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024  
Add Nominees  
Track Nominations
- Review Participant Evaluations  
Due Date 12/31/2024  
View
- Review Self Evaluation  
Due Date 12/31/2024
- Complete Manager Evaluation  
Due Date 12/31/2024  
Update and Share  
Pending Acknowledgement

Track Nominations (Hidden)

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

Search by: Document ID = 35150

Show more options

Search Clear

**Participant Evaluation**

Participant Evaluations

Participant	Role	Status	Due Date
Sylvia Register	Other	Completed	12/31/2024

Return

# Nominate Participants (Optional): View the Participant's Evaluation.

Other Evaluation

USG Annual Review for Staff

**Other Evaluation** [Print](#) | [Notify](#)

Tiffany Leslie  
Actions -

	Job Title	Human Resources Generalist	Manager	Pamela Booker
	Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
	Template	Staff-No Add/No Aprv/Inst Val	Document ID	35150
	Status	Completed	Due Date	12/31/2024
	Reviewer	Sylvia Register	Role	Other

The document status is Completed.

[Reopen](#)

**Goals** | Job Duties | Performance Factors | Values | Overall Summary

Section 1 - Goals

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

> Goal 1

**Audit History**

Created By	Ruby Ronca	03/18/2024 10:27:06AM
Completed By	Sylvia Register	03/25/2024 12:46:32PM
Last Modified By	Sylvia Register	03/25/2024 12:46:32PM

**Manager Evaluation:** Manager will be able to review the “Participant Evaluation” and the “Self Evaluation” once they are submitted.

**Performance Process**

Performance Process

**Steps and Tasks**

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations**  
Due Date 12/31/2024
- Review Self Evaluation**  
Due Date 12/31/2024  
[View](#)
- Complete Manager Evaluation  
Due Date 12/31/2024
  - Update and Share**  
Pending Acknowledgement

**Manager Evaluation:** Click on “Complete Manager Evaluation” and then “Update and Share” to open the evaluation.

The screenshot displays the 'Performance Process' interface for Tiffany Leslie's 'USG Annual Review for Staff' (01/01/2024 - 12/31/2024). The 'Steps and Tasks' section lists several tasks with their due dates and completion status:

- Define Criteria (Due Date: 12/31/2024, Status: Complete)
- Checkpoint 1 (Due Date: 11/01/2024, Status: Complete)
- Finalize Criteria (Due Date: 12/31/2024, Status: Complete)
- Nominate Participants (Due Date: 12/31/2024, Status: In Progress)
- Review Participant Evaluations (Due Date: 12/31/2024, Status: In Progress)
- Review Self Evaluation (Due Date: 12/31/2024, Status: Complete, with a 'View' link)
- Complete Manager Evaluation** (Due Date: 12/31/2024, Status: In Progress)
  - Update and Share** (Pending Acknowledgement)

**Manager Evaluation:** Add Manager Ratings and Comments on Goals. Click on the Calculator to Calculate Summary Rating. Employee Comments and Ratings as well as Participant Comments and Ratings (if applicable) will be visible.

The screenshot displays a web application interface for a performance process. On the left, a sidebar lists 'Steps and Tasks' for 'Tiffany Leslie' with due dates ranging from 11/01/2024 to 12/31/2024. The main content area is titled 'USG Annual Review for Staff' and 'Manager Evaluation - Update and Share'. It features a 'Goals' tab and a 'Section 1 - Goals' dropdown. A red box highlights a 'Goal 1' form with the following details:

- Description: Enter description of the Goal
- Start Date: 01/01/2024
- End Date: 12/31/2024
- Manager Rating: 3 - Successful (3.00)
- Manager Comments: Completed Goals for the year.
- Employee Rating: 3 - Successful
- Created By: Pamela Booker (03/25/2024 11:51AM)
- Last Modified By: Pamela Booker (03/25/2024 1:17PM)

Below the goal form is a 'Goals Summary' table:

Summary Weight	25 %	(not less than 25%)
Manager Rating	3 - Successful	3.00
Employee Rating	3 - Successful	

The calculator icon in the 'Goals Summary' table is highlighted with a red box.

**Manager Evaluation:** Complete the “Manager’s Evaluation”. Add Manager Ratings and Comments on Job Duties. Click on the Calculator to Calculate Summary Rating. Employee Comments and Ratings as well as Participant Comments and Ratings (if applicable) will be visible.

**Performance Process**

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

Define Criteria Due Date 12/31/2024

Checkpoint 1 Due Date 11/01/2024

Finalize Criteria Due Date 12/31/2024

Nominate Participants Due Date 12/31/2024

Review Participant Evaluations Due Date 12/31/2024

Review Self Evaluation Due Date 12/31/2024 View

Complete Manager Evaluation Due Date 12/31/2024

USG Annual Review for Staff

Manager Evaluation - Update and Share

Calculate All Ratings

Print | Notify | Export

Goals **Job Duties** Performance Factors Values Overall Summary Sign-off Remarks

Section 2 - Job Duties & Knowledge

Expand | Collapse

Employee Administration & Support

Recruiting and Onboarding

Benefits Administration

**Job Duties & Knowledge Summary**

Summary Weight 40 % (not less than 40%)

Manager Rating 0.00

Manager Comments

Overall completes job duties successfully.

Employee Rating 3 - Successful

Participant Feedback

Display Name	Role	Rating	Results
Sylvia Register	Other	3 - Successful	Always completed job duties well.

**Manager Evaluation:** Complete the “Manager’s Evaluation”. Add Manager Ratings and Comments on Performance Factors. Click on the Calculator to Calculate Summary Rating. Employee Comments and Ratings as well as Participant Comments and Ratings (if applicable) will be visible.

The screenshot shows a web application interface for a performance review process. The main header is "Performance Process" with a "Performance Process" sub-header and "Steps and Tasks" on the left. The main content area is titled "Manager Evaluation - Update and Share" and includes a "Calculate All Ratings" button. Below this, there are tabs for "Goals", "Job Duties", "Performance Factors", "Values", "Overall Summary", and "Sign-off Remarks". The "Performance Factors" tab is active, showing a list of categories: Communication, Customer Service, Initiative, Innovation, Job Knowledge, Adherence to University Policies, Quality of Work, Interpersonal Relationships, Reliability/Attendance, and Critical Thinking. At the bottom, there is a "Performance Factors Summary" section with input fields for "Summary Weight" (20%) and "Manager Rating" (3 - Successful).

This close-up screenshot focuses on the "Performance Factors Summary" section. It displays the following information:

- Summary Weight:** 20 % (not less than 20%)
- Manager Rating:** 3 - Successful, 3.00
- Manager Comments:** A text area containing "Completes all Performance Factors Successfully" with a rich text editor toolbar above it.
- Employee Rating:** 3 - Successful

A red box highlights the "Manager Rating" field and the "Manager Comments" text area.

**Manager Evaluation:** Complete the “Manager’s Evaluation”. Add Manager Ratings and Comments on MGA Core Values. Click on the Calculator to Calculate Summary Rating. Employee Comments and Ratings as well as Participant Comments and Ratings (if applicable) will be visible.

The screenshot displays the 'Performance Process' interface for a 'USG Annual Review for Staff'. The main section is titled 'Manager Evaluation - Update and Share' and includes tabs for 'Goals', 'Job Duties', 'Performance Factors', 'Values', 'Overall Summary', and 'Sign-off Remarks'. The 'Values' tab is active, showing a list of values: 'Adaptability', 'Engagement', 'Learning', and 'Stewardship'. The 'Engagement' value is expanded, showing a description: 'Recognizing that learning is a social activity and that we cannot fulfill our mission of public higher education without collaborating with those on our campuses and outside our doors in our communities.' Below the description, there are fields for 'Manager Rating' (3 - Successful, 3.00), 'Manager Comments' (Contributes in the conversation at team meetings), 'Employee Rating' (3 - Successful), and 'Employee Comments' (Always engaged in conversations with coworkers and contributing during team meetings). A 'Values Summary' section at the bottom shows a 'Summary Weight' of 15% (not less than 15%), a 'Manager Rating' of 3 - Successful (3.00), and an 'Employee Rating' of 3 - Successful.

This close-up view of the 'Values Summary' section shows the following data:

Summary Weight	15 %	(not less than 15%)
Manager Rating	3 - Successful	3.00
Employee Rating	3 - Successful	

**Manager Evaluation:** Complete the “Manager’s Evaluation”. Add Manager Ratings and Comments on Overall Summary. Click on the Calculator to Calculate Summary Rating. Employee Comments and Ratings as well as Participant Comments and Ratings (if applicable) will be visible.

**Performance Process**

Performance Process Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria Due Date 12/31/2024
- Checkpoint 1 Due Date 11/01/2024
- Finalize Criteria Due Date 12/31/2024
- Nominate Participants Due Date 12/31/2024
- Review Participant Evaluations Due Date 12/31/2024
- Review Self Evaluation Due Date 12/31/2024 [View](#)
- Complete Manager Evaluation Due Date 12/31/2024

**USG Annual Review for Staff** Save Share with Employee

**Manager Evaluation - Update and Share** Print Notify Export

Goals Job Duties Performance Factors Values **Overall Summary** Sign-off Remarks

Section 7 - Overall Summary

Manager Rating 3 - Successful 3.30

Manager Comments [Writing Tools](#)  
Essential member of the team who is accurate and persistent when it comes to their work.

Employee Rating 3 - Successful

Employee Comments  
Overall I am successful in completing my job duties and any new assignments given to me in a timely manner.

Participant Feedback

Display Name	Role	Rating	Results
Sylvia Register	Other	3 - Successful	Great Employee who works hard and completes tasks accurately and efficiently

**Attachments**

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
Sample_Document_2.pdf	Project B	Employee and Manag	03/25/2024 1:17:35PM	Pamela Booker

# Manager Evaluation: Add Attachment to Evaluation if necessary

Performance Process

Performance Process Settings Back

Steps and Tasks Refresh Dropdown

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024  
[View](#)
- Complete Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff Save Share with Employee

### Manager Evaluation - Update and Share

Manager Comments Undo Redo Text Color Background Color Font Color B *I* U Align Left Align Center Align Right Table

Completed Goals for the year.

Employee Rating 3 - Successful

Created By Pamela Booker 03/25/2024 11:51AM

### Goals Summary

Summary Weight  % (not less than 25%)

Manager Rating 3 - Successful 3.00 Print Table

Employee Rating 3 - Successful

### Attachments

No Attachments have been added to this document

[+ Add Attachment](#)

### Audit History

Created By	Ruby Ronca	03/18/2024 10:27:06AM
Last Modified By	Pamela Booker	03/25/2024 12:25:11PM

# Manager Evaluation: Add Attachment to Evaluation if necessary (cont.)

Performance Process

Performance Process Settings Back

Steps and Tasks Refresh Dropdown

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Nominate Participants  
Due Date 12/31/2024
- Review Participant Evaluations  
Due Date 12/31/2024
- Review Self Evaluation  
Due Date 12/31/2024  
[View](#)
- Complete Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

Manager Evaluation - Update and Share Print Notify Export

Employee Rating 3 - Successful

Created By Pamela Booker 03/25/2024 11:51AM  
Last Modified By Pamela Booker 03/25/2024 1:17PM

Goals Summary

Summary Weight  % (not less than 25%)

Manager Rating 3 - Successful 3.00  

Employee Rating 3 - Successful

Attachments

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
<a href="#">Sample_Document_2.pdf</a>	<input type="text" value="Project B"/>	Employee and Manag <span>▼</span>	03/25/2024 1:17:35PM	Pamela Booker	

+ [Add Attachment](#)

▼ Audit History

Created By Ruby Ronca 03/18/2024 10:27:06AM  
Last Modified By Pamela Booker 03/25/2024 1:17:35PM

**Manager Evaluation:** Once the Evaluation has been completed, click on “Share with Employee” in the top right corner. “Confirm”.

The screenshot displays a web application interface for a performance evaluation process. The main window is titled "Performance Process" and shows a "USG Annual Review for Staff" document. In the top right corner, there are two buttons: "Save" and "Share with Employee". The "Share with Employee" button is circled in red. A dialog box titled "Share with Employee" is open in the center of the screen. The dialog box contains the following text: "Select confirm to share this document with the employee. Next, you should meet with the employee to discuss your evaluation. The overall rating you have assigned to this employee is 3 - Successful. Comments should be entered in the Overall Summary section to justify a Rating of a 1 or a 5. Upon selecting confirm, your electronic signature will be added to this document." Below the text are two buttons: "Confirm" and "Cancel". The "Confirm" button is circled in red. The background interface shows a sidebar with a list of steps and tasks, including "Define Criteria", "Checkpoint 1", "Finalize Criteria", "Nominate Participants", "Review Participant Evaluations", "Review Self Evaluation", and "Complete Manager Evaluation". The main content area shows a "Manager Evaluation - Update and Share" section with a profile picture of Tiffany Leslie and a table of document details. The "Section 7 - Overall Summary" section is visible at the bottom, showing a "Manager Rating" of 3 - Successful and a "Manager Comments" text area containing the text "Essential member of the team who is accurate and persistent when it comes to their work." Below this, there is an "Employee Rating" of 3 - Successful and an "Employee Comments" text area containing the text "Overall I am successful in completing my job duties and any new assignments given to me in a timely manner."

# Manager Evaluation: "Share with Employee" (cont.)

The screenshot displays a mobile application interface for a performance process. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a home icon. Below this is a header for "Performance Process". The main content area is split into two panels. The left panel, titled "Performance Process", shows a list of steps and tasks for "Tiffany Leslie" under the "USG Annual Review for Staff" process, with dates from 01/01/2024 to 12/31/2024. The steps include "Define Criteria", "Checkpoint 1", "Finalize Criteria", "Nominate Participants", "Review Participant Evaluations", "Review Self Evaluation", and "Complete Manager Evaluation". The "Complete Manager Evaluation" step is expanded to show "Update and Share" (highlighted in yellow) and "Pending Acknowledgement". The right panel, titled "USG Annual Review for Staff", displays a confirmation message: "Confirmation - Shared with Employee" followed by a green checkmark and the text "You have successfully shared your evaluation with the employee."

**Performance Process**

**Performance Process** ⚙️ ⏪

**Steps and Tasks** 🔄 ⚙️ ▼

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- ▶️ **Define Criteria**  
Due Date 12/31/2024
- ▶️ **Checkpoint 1**  
Due Date 11/01/2024
- ▶️ **Finalize Criteria**  
Due Date 12/31/2024
- ▶️ **Nominate Participants**  
Due Date 12/31/2024
- ▶️ **Review Participant Evaluations**  
Due Date 12/31/2024
- ▶️ **Review Self Evaluation**  
Due Date 12/31/2024
- ▶️ **Complete Manager Evaluation**  
Due Date 12/31/2024
  - ✔️ **Update and Share**
  - ⚪ **Pending Acknowledgement**

**USG Annual Review for Staff**

**Confirmation - Shared with Employee**

✔️ You have successfully shared your evaluation with the employee.

**Historical Documents:** Once Employee has “acknowledged” and “signed” the Manager Evaluation. Managers will be able to access past performance documents in the “My Historical Documents” section of the Team Performance Tile in Manager Self Service.

**Team Performance**

- Current Documents
- Delegated Documents
- Historical Documents**
- View-Only Documents
- Approve Documents
- View Approval Status

### Historical Documents

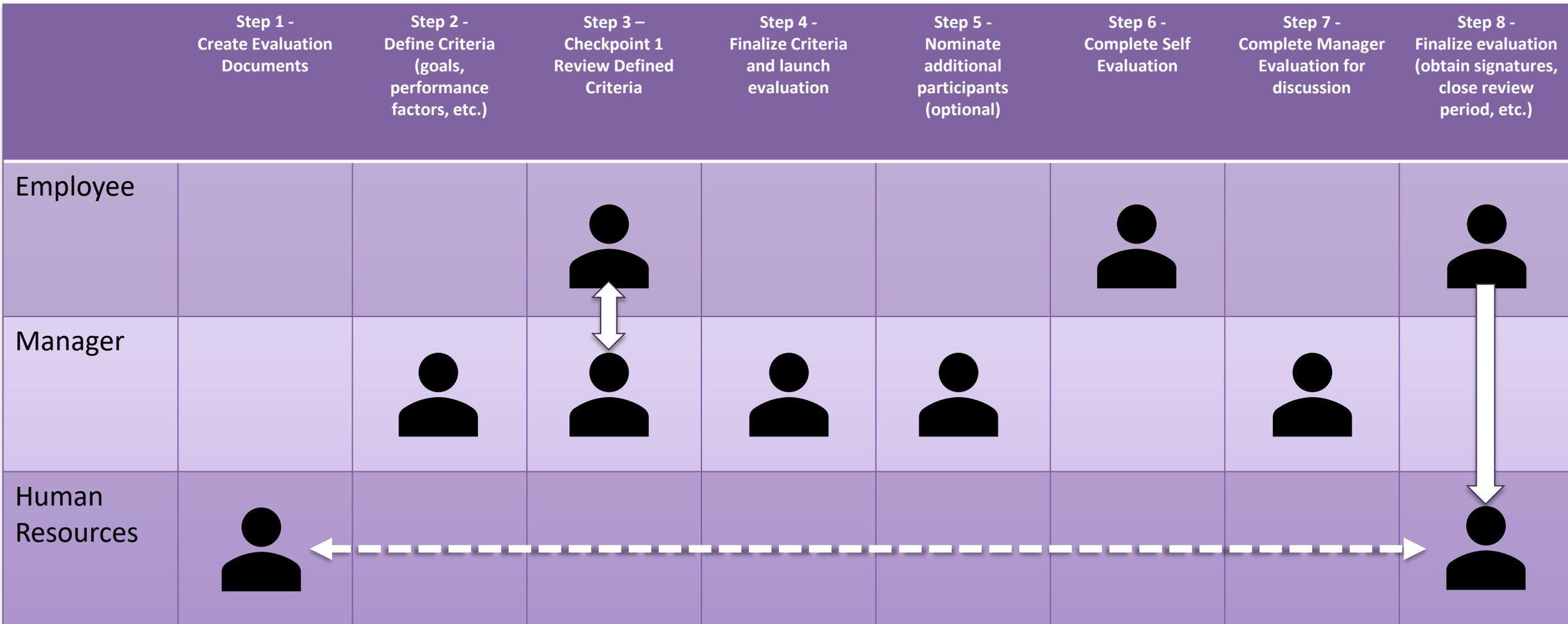
Name / Job Title	Document Type	Document Status	Period Begin / Period End
 <b>Tiffany Leslie</b> Human Resources Generalist	USG Annual Review for Staff	Completed	01/01/2024 12/31/2024

# Employee

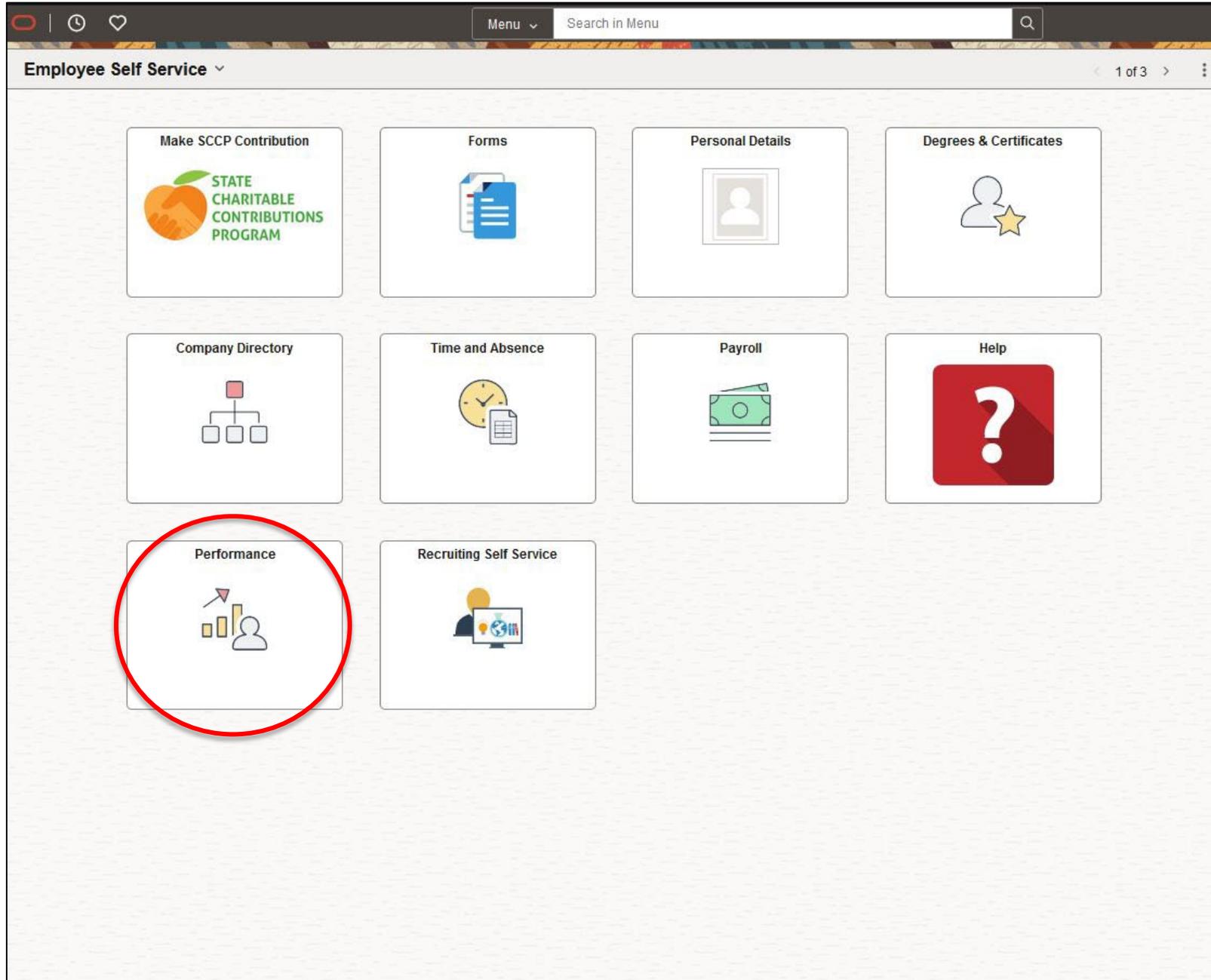


**Middle Georgia** State University

# Performance Evaluations Process Flow



# Checkpoint 1: Log into OneUSG. In Employee Self Service, Choose the Performance Tile.



**Checkpoint 1:** In My Current Documents, an USG Annual Review for Staff in the Status of “Track Progress – Checkpoint 1” will be visible. Click on this tile.

The screenshot shows a mobile application interface for performance management. At the top, there is a navigation bar with a search bar labeled "Search in Menu" and standard mobile navigation icons. Below the navigation bar is a header section titled "Performance". Underneath the header, the user's profile is displayed: "Tiffany Leslie" (Human Resources Generalist, ID 0242811). A sidebar menu on the left lists document categories: "My Current Documents" (1), "My Historical Documents", "Evaluations of Others" (0), and "Historical Evaluations of Others". The main content area is titled "My Current Documents" and contains a table with the following data:

Document Type	Document Status	Period Begin / Period End	Next Due Date
USG Annual Review for Staff	Track Progress - Checkpoint 1	01/01/2024 12/31/2024	11/01/2024 >

# Checkpoint 1: Review Goals, Job Duties, Performance Factors, and Values. Meet with Supervisor to review this Checkpoint.

## Performance Process

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date: 12/31/2024
- Checkpoint 1  
Due Date: 11/01/2024
  - Review Manager Comments**
- Finalize Criteria  
Due Date: 12/31/2024
- Complete Self Evaluation  
Due Date: 12/31/2024
- Review Manager Evaluation  
Due Date: 12/31/2024

### USG Annual Review for Staff

#### Checkpoint 1 - Review Manager Comments

[Print](#) | [Notify](#)

Tiffany Leslie

	Job Title: Human Resources Generalist	Manager: Pamela Booker
	Document Type: USG Annual Review for Staff	Period: 01/01/2024 - 12/31/2024
	Template: Staff-No Add/No Aprvl/Inst Val	Document ID: 35150
	Status: In Progress	Due Date: 11/01/2024

1. Update your performance criteria by entering any progress against your goals and/or responsibilities.
2. Add any comments on how you are progressing against your performance criteria.
3. Once you are done select the Share with Manager button to save your work and notify your manager that you have shared your comments with them.

[Goals](#) | [Job Duties](#) | [Performance Factors](#) | [Values](#) | [Overall Summary](#)

Section 1 - Goals

Goals will be evaluated by: Employee, Manager, Other

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

Goal 1

Description : Enter description of the Goal

- Start Date : 01/01/2024
- End Date : 12/31/2024

Manager Comments	Comments on Goals
------------------	-------------------

javascript:submitAction\_win0(document.win0,'EP\_BTN\_LINK\_WRK\_EP\_GRPUBBGX5503 Pamela Booker 03/25/2024 11:51AM

# Checkpoint 1: Review Goals and Manager Comments

Performance Process

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024  
**Review Manager Comments**
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
- Review Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

Checkpoint 1 - Review Manager Comments

Print | Notify

Goals Job Duties Performance Factors Values Overall Summary

Section 1 - Goals

Goals will be evaluated by: Employee, Manager, Other

Expand | Collapse

Goal 1

Description : Enter description of the Goal

- Start Date : 01/01/2024
- End Date : 12/31/2024

Manager Comments

Comments on Goals

Created By Pamela Booker 03/25/2024 11:51AM

Goals Summary

Section Weight 25 % (not less than 25%)

Manager Comments

Overall Goal Comments

Audit History

# Checkpoint 1: Review Job Duties

Performance Process

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
  - Review Manager Comments**
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
- Review Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

### Checkpoint 1 - Review Manager Comments

Tiffany Leslie [Print](#) | [Notify](#)

	Job Title Human Resources Generalist	Manager Pamela Booker
	Document Type USG Annual Review for Staff	Period 01/01/2024 - 12/31/2024
	Template Staff-No Add/No Aprvl/Inst Val	Document ID 35150
	Status In Progress	Due Date 11/01/2024

1. Update your performance criteria by entering any progress against your goals and/or responsibilities.
2. Add any comments on how you are progressing against your performance criteria.
3. Once you are done select the Share with Manager button to save your work and notify your manager that you have shared your comments with them.

Goals **Job Duties** Performance Factors Values Overall Summary

Section 2 - Job Duties & Knowledge

Job Duties & Knowledge will be evaluated by: Employee, Manager, Other

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

**Employee Administration & Support**

**Description :** Manages and updates all employee transactions in the HRIS to ensure accurate pay and benefits for employees. Maintain employee personnel files to ensure compliance with record-keeping policies. Counsel employees on various HR topics and functions; communicates and shares an understanding of institution policies and procedures, employment laws, standards and other government regulations. Conducts off-boarding of employees to include exit interviews. Participates in developing departmental guidelines and procedures.

Created By Profile 03/18/2024 10:27AM

> **Recruiting and Onboarding**

> **Benefits Administration**

**Job Duties & Knowledge Summary**

Section Weight 40 % (not less than 40%)

# Checkpoint 1: Review Performance Factors

The screenshot shows a web application interface for a performance review process. The main content area is titled "Checkpoint 1 - Review Manager Comments" and is part of a "USG Annual Review for Staff". The interface includes a sidebar with a "Steps and Tasks" list, a top navigation bar with tabs for "Goals", "Job Duties", "Performance Factors", "Values", and "Overall Summary", and a main content area with a list of performance factors. The "Performance Factors" tab is currently selected and expanded, showing a list of factors such as "Communication", "Customer Service", "Initiative", "Innovation", "Job Knowledge", "Adherence to University Policies", "Quality of Work", "Interpersonal Relationships", "Reliability/Attendance", and "Critical Thinking". A "Performance Factors Summary" section at the bottom indicates a "Section Weight" of 20% (not less than 20%).

**Performance Process**

Performance Process ⚙️ ⏪

Steps and Tasks 🔄 📄

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024  
**Review Manager Comments**
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
- Review Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

**Checkpoint 1 - Review Manager Comments** Print | Notify

Goals Job Duties **Performance Factors** Values Overall Summary

Section 3 - Performance Factors

Performance Factors will be evaluated by: Employee, Manager, Other

Expand | Collapse

- > Communication
- > Customer Service
- > Initiative
- > Innovation
- > Job Knowledge
- > Adherence to University Policies
- > Quality of Work
- > Interpersonal Relationships
- > Reliability/Attendance
- > Critical Thinking

Performance Factors Summary

Section Weight	20 % (not less than 20%)
----------------	--------------------------

# Checkpoint 1: Review MGA Core Values

Performance Process

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024  
**Review Manager Comments**
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
- Review Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

### Checkpoint 1 - Review Manager Comments

Print | Notify

Tiffany Leslie

Job Title	Human Resources Generalist	Manager	Pamela Booker
Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
Template	Staff-No Add/No Aprvl/Inst Val	Document ID	35150
Status	In Progress	Due Date	11/01/2024

1. Update your performance criteria by entering any progress against your goals and/or responsibilities.
2. Add any comments on how you are progressing against your performance criteria.
3. Once you are done select the Share with Manager button to save your work and notify your manager that you have shared your comments with them.

Goals   Job Duties   Performance Factors   **Values**   Overall Summary

Section 4 - Values

Values will be evaluated by: Employee, Manager, Other

Expand | Collapse

- > Adaptability
- > Engagement
- > Learning
- > Stewardship

Values Summary

Section Weight	15 % (not less than 15%)
----------------	--------------------------

javascript:submitAction\_win0(document.win0,'EP\_BTN\_LINK\_WRK\_EP\_GROUPBOX5\$15');

**Self Evaluation:** In “My Current Documents”, an USG Annual Review for Staff in the Status of “Evaluation in Progress” will be visible. Click on this tile.

The screenshot shows a mobile application interface. At the top, there is a navigation bar with a search icon, a search input field containing "Search in Menu", and a home icon. Below the navigation bar is a header section titled "Performance". Underneath the header, there is a user profile card for "Tiffany Leslie", identified as a "Human Resources Generalist" with ID "0242811". To the left of the main content is a sidebar menu with four items: "My Current Documents" (highlighted in green with a notification badge of "1"), "My Historical Documents", "Evaluations of Others" (with a notification badge of "0"), and "Historical Evaluations of Others". The main content area is titled "My Current Documents" and contains a table with the following data:

Document Type	Document Status	Period Begin / Period End	Next Due Date
USG Annual Review for Staff	Evaluation in Progress	01/01/2024 12/31/2024	12/31/2024 >

# Self Evaluation: Complete the "Self Evaluation". This can be saved and worked through out the year until completed.

Performance Process

Performance Process Save Complete

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
  - Update and Complete**
- Review Manager Evaluation  
Due Date 12/31/2024

**USG Annual Review for Staff**

**Self-Evaluation - Update and Complete** Print Notify

Tiffany Leslie

Job Title	Human Resources Generalist	Manager	Pamela Booker
Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
Template	Staff-No Add/No Aprvl/Inst Val	Document ID	35150
Status	Evaluation in Progress	Due Date	12/31/2024

**Employee Data**

Employee ID	0242811
Department	1615000 Human Resources

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to send this document to your manager for review.

[Calculate All Ratings](#)

**Goals** | Job Duties | Performance Factors | Values | Overall Summary

**Section 1 - Goals**

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

**Goal 1**

**Description** : Enter description of the Goal

- Start Date : 01/01/2024
- End Date : 12/31/2024

Employee Rating: 3 - Successful 3.00

Employee Comments: I feel I was successful in completing my goals for the year.

Created By: Pamela Booker 03/25/2024 11:51AM

# Self Evaluation: Complete an evaluation on Goals and add Employee Ratings and Comments.

## Click on the Calculator to Calculate Summary Rating

Performance Process

Performance Process Save Complete

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date: 12/31/2024
- Checkpoint 1  
Due Date: 11/01/2024
- Finalize Criteria  
Due Date: 12/31/2024
- Complete Self Evaluation  
Due Date: 12/31/2024
  - Update and Complete**
- Review Manager Evaluation  
Due Date: 12/31/2024

### USG Annual Review for Staff

[Calculate All Ratings](#)

**Self-Evaluation - Update and Complete** Print Notify

**Goals** Job Duties Performance Factors Values Overall Summary

Section 1 - Goals

Expand | Collapse

Goal 1

Description : Enter description of the Goal

- Start Date : 01/01/2024
- End Date : 12/31/2024

Employee Rating: 3 - Successful 3.00

Employee Comments

I feel I was successful in completing my goals for the year.

Created By: Pamela Booker 03/25/2024 11:51AM

### Goals Summary

Summary Weight: 25 % (not less than 25%)

Employee Rating: 3 - Successful 3.00 Calculator

### Attachments

No Attachments have been added to this document

# Self Evaluation: Complete an evaluation on Job Duties and add Employee Ratings and Comments.

Performance Process

Performance Process Save Complete

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
  - Update and Complete**
- Review Manager Evaluation  
Due Date 12/31/2024

### USG Annual Review for Staff

#### Self-Evaluation - Update and Complete

[Print](#) | [Notify](#)

Goals **Job Duties** Performance Factors Values Overall Summary

#### Section 2 - Job Duties & Knowledge

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

##### Employee Administration & Support

**Description :** Manages and updates all employee transactions in the HRIS to ensure accurate pay and benefits for employees. Maintain employee personnel files to ensure compliance with record-keeping policies. Counsel employees on various HR topics and functions; communicates and shares an understanding of institution policies and procedures, employment laws, standards and other government regulations. Conducts off-boarding of employees to include exit interviews. Participates in developing departmental guidelines and procedures.

Employee Rating  3.00

Employee Comments [↶](#) [↷](#) [A](#) [AI](#) [A](#) [B](#) *I* U [!:](#) [::](#) [☰](#)

I upkeep records accurately.

Created By Profile 03/18/2024 10:27AM  
Last Modified By Tiffany Leslie 03/25/2024 12:58PM

> **Recruiting and Onboarding**

> **Benefits Administration**

#### Job Duties & Knowledge Summary

Summary Weight  % (not less than 40%)

Employee Rating  3.00

Employee Comments [↶](#) [↷](#) [A](#) [AI](#) [A](#) [B](#) *I* U [!:](#) [::](#) [☰](#)

Complete Duties as assigned accurately

# Self Evaluation: Add Comments to Job Duties & Knowledge Summary. Click on the Calculator to Calculate Summary Rating.

Performance Process

Performance Process

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
  - Update and Complete
- Review Manager Evaluation  
Due Date 12/31/2024

USG Annual Review for Staff

Self-Evaluation - Update and Complete

laws, standards and other government regulations.  
Conducts off-boarding of employees to include exit interviews.  
Participates in developing departmental guidelines and procedures.

Print | Notify

Employee Rating 3 - Successful 3.00

Employee Comments

I upkeep records accurately.

Created By Profile 03/18/2024 10:27AM  
Last Modified By Tiffany Leslie 03/25/2024 12:58PM

> Recruiting and Onboarding

> Benefits Administration

Job Duties & Knowledge Summary

Summary Weight 40 % (not less than 40%)

Employee Rating 3 - Successful 3.00

Employee Comments

Complete Duties as assigned accurately

**Self Evaluation:** Complete an evaluation on Performance Factors and add Employee Ratings and Comments. Click on the Calculator to Calculate Summary Rating.

**Performance Process**

Performance Process Save Complete

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

Define Criteria  
Due Date 12/31/2024

Checkpoint 1  
Due Date 11/01/2024

Finalize Criteria  
Due Date 12/31/2024

Complete Self Evaluation  
Due Date 12/31/2024  
**Update and Complete**

Review Manager Evaluation  
Due Date 12/31/2024

**Self-Evaluation - Update and Complete** Print Notify

Goals Job Duties **Performance Factors** Values Overall Summary

Section 3 - Performance Factors

Expand Collapse

- Communication
- Customer Service
- Initiative
- Innovation
- Job Knowledge
- Adherence to University Policies
- Quality of Work
- Interpersonal Relationships
- Reliability/Attendance
- Critical Thinking

**Performance Factors Summary**

Summary Weight	<input type="text" value="20"/>	%	(not less than 20%)
Employee Rating	3 - Successful	3.00	

# Self Evaluation: Complete an evaluation on the MGA Core Values and add Employee Ratings and Comments. Click on the Calculator to Calculate Summary Rating.

Performance Process

Performance Process Save Complete

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 Overview

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
  - Update and Complete
- Review Manager Evaluation  
Due Date 12/31/2024

### USG Annual Review for Staff

#### Self-Evaluation - Update and Complete

Print | Notify

Goals Job Duties Performance Factors **Values** Overall Summary

Section 4 - Values

Expand | Collapse

Adaptability

Engagement

Description : Recognizing that learning is a social activity and that we cannot fulfill our mission of public higher education without collaborating with those on our campuses and outside our doors in our communities.

Employee Rating  3.00

Employee Comments ↶ ↷ A AI A B *I* U ≡ ≡ ☰

Always engaged in conversations with coworkers and contributing during team meetings.

Created By Profile 03/18/2024 10:27AM

Learning

Stewardship

#### Values Summary

Summary Weight  % (not less than 15%)

Employee Rating 3 - Successful 3.00

**Self Evaluation:** Complete an Overall Summary and add Employee Comments. Click on Calculate All Ratings before completing this section.

The screenshot shows a web application interface for a performance review. The main title is "Performance Process" and the specific document is "USG Annual Review for Staff". The user is "Tiffany Leslie". The interface is divided into a left sidebar with "Steps and Tasks" and a main content area. The "Steps and Tasks" sidebar lists: Define Criteria (Due Date: 12/31/2024), Checkpoint 1 (Due Date: 11/01/2024), Finalize Criteria (Due Date: 12/31/2024), Complete Self Evaluation (Due Date: 12/31/2024), Update and Complete (highlighted), and Review Manager Evaluation (Due Date: 12/31/2024). The main content area shows "Self-Evaluation - Update and Complete" for Tiffany Leslie. It includes a profile picture, job title "Human Resources Generalist", manager "Pamela Booker", and document ID "35150". A section titled "Employee Data" shows Employee ID "0242811" and Department "1615000 Human Resources". Below this is a text box with the instruction: "Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to send this document to your manager for review." A red box highlights a button labeled "Calculate All Ratings". Below the text box are tabs for "Goals", "Job Duties", "Performance Factors", "Values", and "Overall Summary" (which is selected). Under the "Overall Summary" tab, there is a section titled "Section 5 - Overall Summary" containing a text editor. The text editor shows an "Employee Rating" of "3 - Successful" with a score of "3.30" and "Employee Comments" that read: "Overall I am successful in completing my job duties and any new assignments given to me in a timely manner." At the bottom, there is an "Attachments" table with columns: File Name, Description, Attachment Audience, Last Update Date/Time, and Uploaded By.

**Performance Process**

**Performance Process** Save Complete

**Steps and Tasks**

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date: 12/31/2024
- Checkpoint 1  
Due Date: 11/01/2024
- Finalize Criteria  
Due Date: 12/31/2024
- Complete Self Evaluation  
Due Date: 12/31/2024
- Update and Complete**
- Review Manager Evaluation  
Due Date: 12/31/2024

**USG Annual Review for Staff**

**Self-Evaluation - Update and Complete** Print Notify

Tiffany Leslie

Job Title: Human Resources Generalist  
Document Type: USG Annual Review for Staff  
Manager: Pamela Booker  
Period: 01/01/2024 - 12/31/2024  
Template: Staff-No Add/No Aprvl/Inst Val  
Document ID: 35150  
Status: Evaluation in Progress  
Due Date: 12/31/2024

**Employee Data**

Employee ID: 0242811  
Department: 1615000 Human Resources

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to send this document to your manager for review.

**Calculate All Ratings**

Goals Job Duties Performance Factors Values **Overall Summary**

**Section 5 - Overall Summary**

Employee Rating: 3 - Successful 3.30

Employee Comments: Overall I am successful in completing my job duties and any new assignments given to me in a timely manner.

**Attachments**

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
-----------	-------------	---------------------	-----------------------	-------------

# Self Evaluation: Add attachments to Evaluation if necessary.

The screenshot displays a web application interface for a performance review process. The main content area is titled "Self-Evaluation - Update and Complete" and includes the following elements:

- Employee Rating:** A dropdown menu set to "3 - Successful" with a numerical value of 3.00.
- Employee Comments:** A rich text editor containing the text "I feel I was successful in completing my goals for the year." The editor includes a toolbar with various formatting options.
- Goals Summary:** A section showing a "Summary Weight" of 25% (with a note "(not less than 25%)") and an "Employee Rating" of 3 - Successful with a value of 3.00.
- Attachments:** A section with a red border containing the text "No Attachments have been added to this document" and a button labeled "+ Add Attachment".
- Audit History:** A section showing the following data:

Created By	Ruby Ronca	03/18/2024 10:27:06AM
Last Modified By	Pamela Booker	03/25/2024 12:25:11PM

The left sidebar shows the "Performance Process" with a list of steps: Define Criteria, Checkpoint 1, Finalize Criteria, Complete Self Evaluation (with "Update and Complete" highlighted), and Review Manager Evaluation. The top right of the interface features "Save" and "Complete" buttons, and a "Print | Notify" link.

# Self Evaluation: Add Attachment (cont.)

Performance Process

Performance Process Save Complete

Steps and Tasks

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
  - Update and Complete
- Review Manager Evaluation  
Due Date 12/31/2024

### USG Annual Review for Staff

#### Self-Evaluation - Update and Complete

Employee Rating 3 - Successful 3.00 Print Notify

Employee Comments

I feel I was successful in completing my goals for the year.

Created By Pamela Booker 03/25/2024 11:51AM  
Last Modified By Tiffany Leslie 03/25/2024 12:58PM

#### Goals Summary

Summary Weight  % (not less than 25%)  
Employee Rating 3 - Successful 3.00

#### Attachments

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
<a href="#">Sample_Document_1.pdf</a>	<input type="text" value="Project A"/>	Employee and Manag <input type="text" value="v"/>	03/25/2024 12:59:55PM	Tiffany Leslie	

+ Add Attachment

#### Audit History

Created By Ruby Ronca 03/18/2024 10:27:06AM  
Last Modified By Pamela Booker 03/25/2024 12:59:55PM

**Self Evaluation:** Once completed, click “Complete” in the top right corner and Confirm to finalize Self Evaluation.

The screenshot displays a web application interface for a performance review process. The main header is "Performance Process". On the left, a sidebar shows a "Steps and Tasks" list with items like "Define Criteria", "Checkpoint 1", "Finalize Criteria", "Complete Self Evaluation", "Update and Complete", and "Review Manager Evaluation". The "Update and Complete" step is highlighted. The main content area is titled "USG Annual Review for Staff" and "Self-Evaluation - Update and Complete" for employee Tiffany Leslie. It shows a profile picture, job title "Human Resources Generalist", manager "Pamela Booker", and document details. A "Complete Evaluation" dialog box is open in the center, with the "Confirm" button circled in red. The dialog text reads: "You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review." Below the dialog, the "Employee Rating" is shown as "3 - Successful" with a score of "3.30". The "Employee Comments" field contains the text: "Overall I am successful in completing my job duties and any new assignments given to me in a timely manner." At the bottom, there is an "Attachments" table with columns for File Name, Description, Attachment Audience, Last Update Date/Time, and Uploaded By.

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
-----------	-------------	---------------------	-----------------------	-------------

# Self Evaluation: "Complete" (cont.)

The screenshot displays a mobile application interface for a performance process. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a home icon. Below this, the main header reads "Performance Process".

The interface is split into two main sections. On the left, a sidebar titled "Performance Process" contains a sub-section "Steps and Tasks". Under this, the user's name "Tiffany Leslie" and the task "USG Annual Review for Staff" are listed, with a date range of "01/01/2024 - 12/31/2024" and an "Overview" link. A list of tasks follows, each with a status icon and a due date:

- Define Criteria (Completed, Due Date: 12/31/2024)
- Checkpoint 1 (Completed, Due Date: 11/01/2024)
- Finalize Criteria (Completed, Due Date: 12/31/2024)
- Complete Self Evaluation (Completed, Due Date: 12/31/2024, with a "View" link)
- Review Manager Evaluation (Not Started, Due Date: 12/31/2024)

The right section of the screen is titled "USG Annual Review for Staff" and features a prominent heading "Confirmation - Document Completed". Below this heading, a green checkmark icon is followed by the text: "You have successfully completed your evaluation."

**Manager Evaluation:** In “My Current Documents”, an USG Annual Review for Staff in the Status of “Pending Acknowledgment” will be visible. Click on this tile.

The screenshot shows a user interface for performance management. At the top, there is a navigation bar with a search box labeled "Search in Menu" and standard mobile navigation icons. Below the navigation bar is a header section titled "Performance".

The user profile is displayed as "Tiffany Leslie", Human Resources Generalist, with ID 0242811. A left-hand menu contains several options: "My Current Documents" (highlighted in green with a notification badge of 1), "My Historical Documents", "Evaluations of Others" (with a notification badge of 0), and "Historical Evaluations of Others".

The main content area is titled "My Current Documents" and contains a table with the following data:

Document Type	Document Status	Period Begin / Period End	Next Due Date
USG Annual Review for Staff	Pending Acknowledgement	01/01/2024 12/31/2024	12/31/2024 >

**Manager Evaluation:** Review the evaluation AND meet with manager to review, ask questions, give feedback, etc.

The screenshot displays a web application interface for a performance review process. The main header is 'Performance Process'. Below it, the current document is titled 'USG Annual Review for Staff'. The user is identified as Tiffany Leslie. The interface includes a 'Steps and Tasks' sidebar on the left, a main content area with a 'Manager Evaluation - Acknowledge' section, and a 'Goals Summary' table at the bottom.

**Performance Process**

Performance Process ⚙️ ⏪

Steps and Tasks 🔄 📄

Tiffany Leslie  
USG Annual Review for Staff  
01/01/2024 - 12/31/2024 [Overview](#)

- Define Criteria  
Due Date 12/31/2024
- Checkpoint 1  
Due Date 11/01/2024
- Finalize Criteria  
Due Date 12/31/2024
- Complete Self Evaluation  
Due Date 12/31/2024
- Review Manager Evaluation  
Due Date 12/31/2024
  - Acknowledge**  
[View](#)

**USG Annual Review for Staff** Save Acknowledge

**Manager Evaluation - Acknowledge** Print Notify Export

Tiffany Leslie

Job Title	Human Resources Generalist	Manager	Pamela Booker
Document Type	USG Annual Review for Staff	Period	01/01/2024 - 12/31/2024
Template	Staff-No Add/No Aprv/Inst Val	Document ID	35150
Status	Pending Acknowledgement	Due Date	12/31/2024

**Employee Data**

Employee ID	0242811
Department	1615000 Human Resources

This document is currently waiting for your acknowledgment.  
Select the Acknowledge button to confirm that you and your manager have discussed this document. Your name will be placed in the signature section on the printed document acknowledging that the review was held.

**Goals** | Job Duties | Performance Factors | Values | Overall Summary | Sign-off Remarks

**Section 1 - Goals**

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

> **Goal 1**

**Goals Summary**

Summary Weight	25 %	(not less than 25%)
Manager Rating	3 - Successful	3.00
Employee Rating	3 - Successful	

**Attachments**

**Manager Evaluation:** Once meeting is complete, employee will click “Acknowledge” in the top right corner. Employee must write a comment for evaluation to be completed. “Confirm”

The screenshot displays a web application interface for a performance review process. The main content area is titled "Manager Evaluation - Acknowledge" and shows details for Tiffany Leslie, a Human Resources Generalist, with a manager Pamela Booker. The document is in a "Pending Acknowledgement" status. A modal dialog box titled "Acknowledge Review Held" is open, containing the following text: "You have chosen to acknowledge that you and your manager have reviewed this document. Your acknowledgement does not necessarily mean you agree with your evaluation but that you have reviewed it with your manager. Please add Comments." Below this text is a text input field with the placeholder "Employee Acknowledgement Comments" and the text "Thank you for the Annual Evaluation." At the bottom of the dialog, the "Confirm" button is circled in red. Below the dialog, a "Goals Summary" table is visible:

Goals Summary		
Summary Weight	25 %	(not less than 25%)
Manager Rating	3 - Successful	3.00
Employee Rating	3 - Successful	

# Manager Evaluation: "Acknowledge" (cont.)

The screenshot displays a web application interface for a performance process. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a home icon. Below this, the main header reads "Performance Process".

The interface is split into two main sections. On the left, a sidebar titled "Performance Process" contains a sub-section "Steps and Tasks". Under this, the user "Tiffany Leslie" is identified, along with the task "USG Annual Review for Staff" for the period "01/01/2024 - 12/31/2024". A list of tasks follows, each with a green checkmark and a due date:

- Define Criteria (Due Date: 12/31/2024)
- Checkpoint 1 (Due Date: 11/01/2024)
- Finalize Criteria (Due Date: 12/31/2024)
- Complete Self Evaluation (Due Date: 12/31/2024)
- Review Manager Evaluation (Due Date: 12/31/2024)

The right-hand section is titled "USG Annual Review for Staff" and features a sub-header "Confirmation - Employee Acknowledgement". Below this, a green checkmark icon is followed by the text: "You have successfully acknowledged this document."

**Historical Documents:** Performance documents will be maintained in the “My Historical Documents” section of the Performance Tile in Employee Self Service.

The screenshot shows a web interface for a Performance tile. At the top, there is a navigation bar with a search box labeled "Search in Menu". Below this, the "Performance" section header is visible. A user profile for Tiffany Leslie, Human Resources Generalist (ID: 0242811), is shown. A sidebar on the left contains menu items: "My Current Documents" (0), "My Historical Documents" (highlighted), "Evaluations of Others" (0), and "Historical Evaluations of Others". The main content area displays the "My Historical Documents" section with a table containing one entry.

Document Type	Document Status	Period Begin / Period End
USG Annual Review for Staff	Completed	01/01/2024 12/31/2024



# Timeline for 2024 Annual Evaluations

Evaluative Period January 1, 2024 – December 31, 2024

April 15, 2024

Deadline to share Checkpoint 1 with employee but can be shared prior to this date.

Employee must be given a minimum of 2 weeks to review their Defined Criteria for the upcoming year.

April 30, 2024

Deadline to Finalize Criteria

Dec. 2024 – Feb. 2025

Self Evaluations and Participant Evaluations (if applicable) should be completed

Complete Manager Evaluation and plan to meet with employee to review Annual Evaluation for 2024

March 1, 2025

Annual Evaluations are due no later than today

# Resources & Tools



## HUMAN RESOURCES

ONEUSG CONNECT RECRUITMENT & HIRING PROCESS EMPLOYEE ORIENTATION PAYROLL OFFICE ADDITIONAL RESOURCES

### Performance Evaluations

Performance management is an ongoing process, which helps foster communication and planning for future success for supervisors and employees. Performance evaluations provide information for professional development and growth, by setting goals and expectations for the coming year. Finally, performance reviews provide a documented account of each employee's performance during the review period and are required by the University System of Georgia's Board of Regents.

#### Key Information:

Annual performance review period: Jan. 1 to Dec. 31.

Annual performance evaluations should be completed as close to the end of the performance period, i.e., Dec. 31.

#### Performance FAQs

<i>Which employees are required to receive an annual performance review?</i>	+
<i>I am a manager and I do not see one or more of my employees listed under my team performance tile.</i>	+
<i>What are the components of performance evaluation?</i>	+
<i>What if an employee's supervisor has changed during the performance period?</i>	+
<i>What are some best practices for completing reviews?</i>	+
<i>What if an employee doesn't agree with their review?</i>	+
<i>Who should employees contact for help with performance evaluations?</i>	+

#### Resources And Tools:

##### Manager:

- ePerformance Manager Guide
- Steps to Launch Evaluation
- USG ePerformance Evaluation Factors

##### Employees:

- Performance Evaluation guide

Human Resources

Career Opportunities

Dates and Schedules

Employee Benefits

Employee Wellness

Teleworking/Flextime Policy

Mandatory Training

Performance Evaluations

Training Request Approval

Faculty Classification and Compensation Study

USG Executive Leadership Program

Separation of Employment

Documents & Forms

### Manager Job Aids

- [Manager Define Criteria](#)
- [Manager Navigate to Checkpoint 1](#)
- [Manager & Employee Review Criteria](#)
- [Manager Nominate Participants](#)
- [Manager View Participants Evaluation](#)
- [Manager Review Employee's Self-Evaluation](#)
- [Manager Share Eval with Employee and Submit for Approval](#)

### Employee Job Aids

- [Employee Define Criteria](#)
- [Employee Navigate to Checkpoint 1 and Finalize Criteria](#)
- [Employee Complete Their Self-Evaluation](#)
- [Employee Acknowledge Performance Evaluation](#)

### Nominated Participants

- [Participant Complete an Evaluation](#)

# FAQs



## **When are Annual Evaluations due?**

Annual Evaluations are now in a calendar year setting. The evaluation period will be from January through December. Annual evaluations will be due by March 1, 2025.



## **When will goals for the next year be established?**

In the future, we will be sending out Performance Evaluations in January. This is when goals will be established for the year.



## **If there is an error in employees listed or job descriptions, what should I do?**

Contact Human Resources if there are any issues regarding employees missing or incorrect employees showing up in your Team Members for evaluations.



## **What will happen with New Hires throughout the year?**

Anyone who is hired during the year will be subject to a Provisional Performance Evaluation. This evaluation will be started on their first day of employment and go through the first 6 months of their employment.



## **Can I Copy Goals from Multiple Employees?**

Yes, select “Copy Items from My Team’s Documents” to copy one employee's goals and paste them into another employee.

The background is a vibrant blue with a repeating pattern of colorful speech bubbles. Each bubble is a different color (red, yellow, pink, white) and contains a dark blue question mark. The bubbles are scattered across the entire frame, creating a sense of constant inquiry and communication.

**Questions?**