AstateJobs

Annual Evaluation Guide

https://jobs.astate.edu/hr

Arkansas State University
Office of Human Resources
870-972-3454

Table of Contents

Annual Evaluations

Annual Performance Evaluations are available for all employees who have been with the university for more than 6 months through the AstateJobs system. Annual evaluations must be finalized by May 1. The evaluation process provides the opportunity for supervisors and employees to review specific information on performance, to determine what priorities for performance should be, and to set future goals for development. The system provides the specific duties of each position in the evaluation from the position description on record. This insures that an employee is evaluated based on the expectations of their position as presented when hired and after any changes in their duties over time.

Annual Evaluations are required for classified employees and are strongly encouraged for non-classified employees. Some divisions/departments require Non-classified annual evaluations.

The evaluation process must begin with an initiator or hiring manager/dept. chair. The initiator level is available for use when there are multiple levels of supervision under the dean/director. Please contact Human Resources (972-3454) to designate an initiator.

Email notifications are sent to each user/approver when action is required. Annual evaluation approvals are as follows:

Initiator, Hiring Manager, Dean/Director, Employee, Hiring Manger, VP/VC, HR

Classified Annual Evaluations

- Once logged in, check "Your Current Group" to verify that you are logged in as the correct user type (Hiring Manager/Dept Chair, Initiator). Your user group may be changed by selecting "Change User Type" from the ADMIN menu.
- Select "Begin New Evaluation" from the EVALUATIONS menu on the navigation bar.
- Click "Start Action" under the desired evaluation type.

- Search by one of the available options. For a list of all positions in your area, search without providing any criteria. Otherwise, enter the employee's last name or Position Number.

- The position(s) will display as a list. Select the position desired by clicking "Start Action".
- Complete the Evaluation Details page.

- o Employee– <mark>Confirm that the correct employee is listed</mark>. If not, select the employee name from the drop-down list or contact HR. This field directs the evaluation to the employee for review and approval.
  - o Evaluation Type – Select the appropriate type from the drop-down list.
  - o Date of Evaluation – Enter today's date.
  - o Division – Indicate the division from the drop down list if not populated.
  - o Department – Verify that the employee is assigned to the correct department.
  - o Other Users with Access – Move your name and the name of the supervisor (if different) who will review the evaluation prior to submitting to the Dean/Director, to the "Selected" box.
  - o Hire Date – Enter the employee's hire date.
  - o Supervisor – List your name.
  - o Supervisor Phone – List your campus phone number.
  - o "Continue to Next Page"
- Complete the Standard Evaluation page.
  - o Rank each area and or provide comments as needed or required.
  - o Rank the Duties/Responsibilities by Importance.
  - o "Continue to Next Page"
- Complete the Supervisory Performance Review page if the employee has supervisory responsibilities by ranking each topic.
  - o "Continue to Next Page"
- Complete the Overall Performance Rating/Comments page.
  - o Rank topics and provide comments as needed or required.
  - o Select "Preview Evaluation" at the bottom of the screen.

- The Hiring Manager/Dept Chair should select "Printer Friendly Version" and print the document (Utilize this printed form when holding the evaluation meeting with the employee).
  - o Close the print window.
- Select "Send Evaluation to Dean/Director", "Continue" and "Confirm"
- Logout of the system from the red navigation bar.
- Schedule and hold an evaluation conference with the employee.
- Instruct the employee to review, add comments as desired, and approve their evaluation online once received (An email notification will be sent to the hiring manager/dept chair when completed by the employee).

Non-classified Annual Evaluations

- Once [logged in], check "Your Current Group" to verify that you are logged in as the correct [user type] (Hiring Manager/Dept Chair, Initiator). Your user group may be changed by selecting "Change User Type" from the ADMIN menu.
- Select "Begin New Evaluation" from the EVALUATIONS menu on the navigation bar.

- Click "Start Action" under "Non-Classified – Performance Evaluation".
- Search by <u>one</u> of the available options, or for a list of all positions in your area, search without providing any criteria. For one position at a time, enter the employee's last name, ID, <u>or</u> Position Number.
- The position(s) will display as a list. Select the position desired by clicking "[Start Action]" under the Classification Title.
- Complete the <u>Evaluation Details</u> page.

- o Employee – <mark>Confirm that the correct employee is listed</mark>. If not, select the employee name from the drop-down list or contact HR. This field directs the evaluation to the employee for review and approval.
- o Evaluation Type – Select the appropriate type from the drop-down list.
- o Date of Evaluation – Enter today's date.
- o Department – Verify that the employee is assigned to the correct department.
- o Division – Select the division from the drop down list.

- o Other Users with Access – Move your name and the name of the supervisor (if different) who will review prior to submitting to the Dean/Director, to the "Selected" box.
  - o "Continue to Next Page"
- Complete the <u>Evaluation</u> page.
  - o Rank each area and or provide comments as needed or required.
  - o Rank the Duties/Responsibilities by Importance.
  - o "Continue to Next Page"

- Complete the <u>Comments</u> page as needed or required.
  - o Select "Preview Evaluation" at the bottom of the screen.

- Select "Printer Friendly Version" and print document. (Utilize this printed form when conducting the evaluation meeting with the employee. Provide a copy of this form to the employee.)
  - o Close the print document.
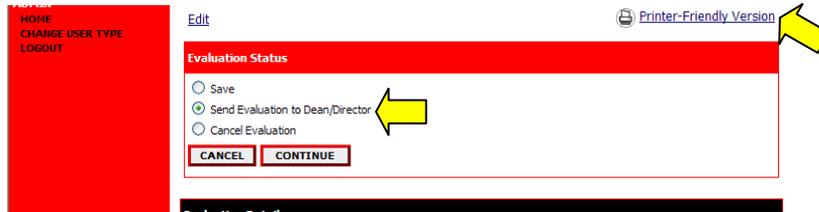
- Select "Send Evaluation to Dean/Director", "Continue" and "Confirm".
- Logout of the system from the red navigation bar.
- Hold the evaluation meeting with the employee and provide a copy of the evaluation for the employee. A signed copy may be retained for the department.
- Instruct the employee to review, add comments as desired, and approve their evaluation online once received (An email notification will be sent to the hiring manager/dept chair when completed by the employee).

Employee Approval of Evaluation

- Login to AstateJobs at https://jobs.astate.edu/hr using your network username (username@astate.edu) and password.

- Check your Current User Group as listed under your name at the top of the page. Your group should be Employee.
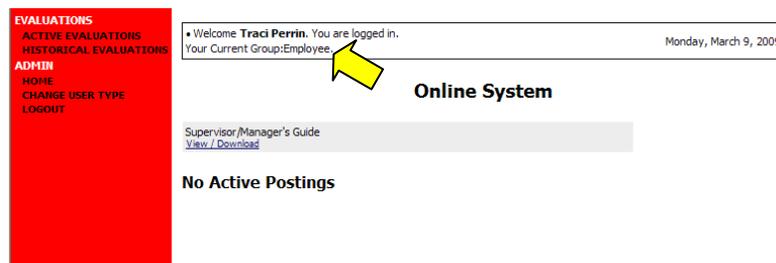
- If not, select Change User Type from the menu on the red navigation bar.
  - Select Employee.
  - Click "Change Group".
- Select "Active Evaluations" from the EVALUATIONS menu on the navigation bar.
  - Select "View" under the classification title of your position and review.

- If you wish to add comments, select "Edit" above the Evaluation Status window.

- Indicate that comments will be attached by answering "Yes" at the bottom of the page, and select the Employee Comments tab.

- Select "Attach" next to the memo document option

View/Edit Classified - Annual Performance Evaluation - Applicant Tracking Coordinator

HISTORICAL EVALUATIONS
ADMIN
HOME
CHANGE USER TYPE
LOGOUT

| Evaluation Details | Standard Evaluation | Supervisory Performance Review | Overall Performance Rating/ Comments | Employee Comments |

Employees may click the Attach link to submit comments regarding the evaluation. A file in Microsoft Word or Adobe PDF format may be attached or text may be typed directly into the text box on the page. Select the ATTACH button and then CONFIRM to complete before selecting CONTINUE TO NEXT PAGE.

1 Record

Attach / Remove	Document Type	Attached Document
Attach	Memo	Not Attached

<< RETURN TO PREVIOUS   CONTINUE TO NEXT PAGE >>

CANCEL   VIEW EVALUATION SUMMARY >>

- o Upload your comments document from your computer files by selecting the "Browse" button or enter your comments directly into the "Paste a new document" text box.
- o Click the corresponding "Attach" button.

CHANGE USER TYPE
LOGOUT

Upload a new document:

Browse below to select a document to associate.

File: [ ] Browse...

ATTACH

Paste a new document:

Please either copy and paste document text or type from scratch into the box below to associate a document.

Text: You may type comments here or attach a document above.

ATTACH

- o Click "Confirm".

HOME
CHANGE USER TYPE
LOGOUT

View/Edit Classified - Annual Performance Evaluation - Applicant Tracking Coordinator

| Evaluation Details | Standard Evaluation | Supervisory Performance Review | Overall Performance Rating/ Comments | Employee Comments |

Employees may click the Attach link to submit comments regarding the evaluation. A file in Microsoft Word or Adobe PDF format may be attached or text may be typed directly into the text box on the page. Select the ATTACH button and then CONFIRM to complete before selecting CONTINUE TO NEXT PAGE.

Click the **Confirm** button below to attach the document.

GO BACK   CONFIRM

<< RETURN TO PREVIOUS   CONTINUE TO NEXT PAGE >>

- Select "View" in the Attached Document column to view and print a copy of your comments for your records.
  - o Close the print window.

- Select "View Evaluation Summary"

- Select "Printer Friendly Version" and print the document for your records.
  - o Close the print window.

- Select "Employee Send Evaluation to Hiring Manager", "Continue", and "Confirm".
- Logout of the site using the "Logout" link in the red ADMIN menu.

Hiring Manger Submission

- An email notification will alert that the evaluation has been completed by the employee and returned to you, the hiring manager.
- Select "Active Evaluations" from the EVALUATIONS menu on the navigation bar.
- Select "View" under the classification title of the desired position and review.

- Select "Printer Friendly Version" and print the document for the department file.
  - o Close the print window.

- Review the details section of the evaluation summary to determine if comments have been attached by the employee.

- If comments have been attached by the employee, review by selecting "Edit" above the Evaluation Status window.

- Select the Employee Comments tab.

- o Select "View" next to the attached memo to review.
- o Print the Employee Comments for the department file.
- o Close the memo print window.
- Select "View Evaluation Summary" at the bottom of the page.

- Select "Send Evaluation to (VP/VC or HR as provided)", "Continue", and "Confirm".
- Logout of the system from the red navigation bar.

Approval of Evaluations (Dean/Director, VP/VC)

- Once logged in, check "Your Current Group" to verify that you are logged in as the correct user type (Dean/Director, VP/VC, etc…) to approve the action. Your user group may be changed by selecting "Change User Type" from the ADMIN menu.
- Select "Active Evaluations" from the EVALUATIONS menu.
- Select "View" under the classification title of the desired position.
- Review the details section of the evaluation summary to determine if comments have been attached by the employee.

- To review comments select "Edit" above the Evaluation Status window.
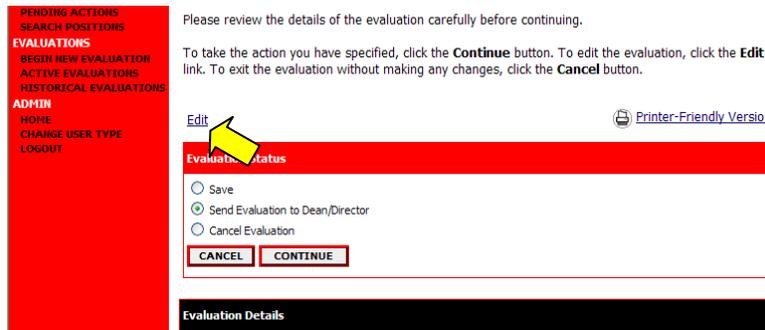
- Select the Employee Comments tab.
  - Select "View" next to the attached memo.
  - Print if desired and close the memo print window.
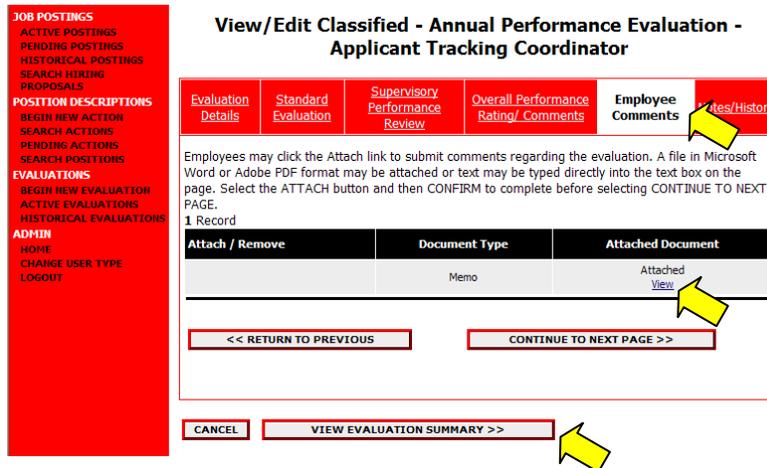
- Select "View Evaluation Summary".
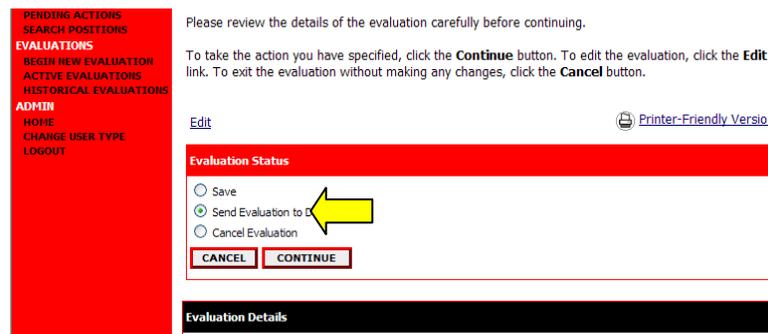
- Select "Send Evaluation to (Employee, VP/VC or HR as provided)", "Continue", and "Confirm".
- Once HR makes the final approval the Hiring Manager/Dept Chair will receive an email notification indicating the evaluation has been completed.