Jacksonville State Performance Quick Guide for Supervisors

Welcome to a quick guide on how to navigate the new performance system.

We have added the following types of evaluations to the online system

- 6 Month Probationary-Non Supervisory
- 6 Month Probationary-Supervisory
- 2022/2023 Annual Review - Staff Supervisory
- 2022/2023 Annual Review - Staff Non-Supervisory
- 2021/2022 Annual Review - Staff Supervisory
- 2021/2022 Annual Review - Staff Non-Supervisory

- This is a generic guide that will focus on how to complete the **2021-2022 Annual Review-Staff Non-Supervisory** but is useful for the other evaluation processes as well

**How to Access the Supervisor and Employee Performance Portal**

- Direct link: https://jacksonville.pageuppeople.com/
- Human Resources website: www.jsu.edu/hr/index.html

 Once you have logged in

You will be brought to the Supervisors Performance Portal Dashboard

You will see two areas at the top of the Page, About Me and My team – You will also see in the middle of the page 4 Widgets, we will focus on the two for your Performance Evaluations

- My Performance Evaluation
- Team Performance Evaluation
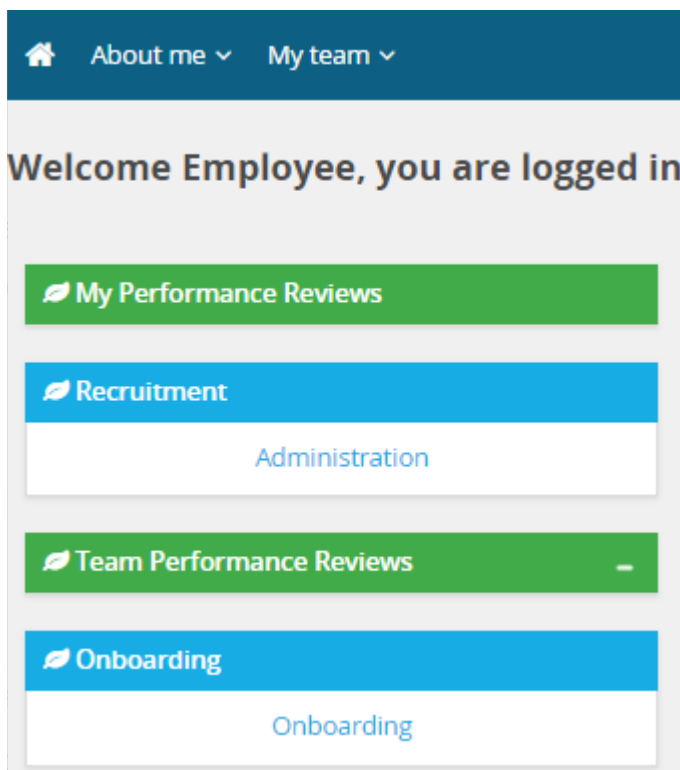
The **About Me** area contains your Journal and Your Performance Review

The **My Team** is for supervisors this area contains -Your Organizational Chart, Team Details and Your Teams Performance Evaluations

The two widgets, My Performance and Team Performance are links to access the various evaluations requiring your attention.

Each Evaluation process that has been created has similar steps but vary with the actual process.

The 6 Month Probationary Review Process

✔ **Step 1- Supervisor sets goals**
✔ **Step 2 - Review Period**
✔ **Step 3 - Supervisor completes evaluation**
✔ **Step 4 - Supervisor/Employee review discussion**
✔ **Step 5 - Employee acknowledges review**
✔ **Step 6 - Review complete**

The Annual Review Process

✔ **Step 1- Manager sets goals**
✔ **Step 2 - Employee Reviews and Acknowledges Goals (SED)**
✔ **Step 3 - Review Period (SED)**
✔ **Step 4 - Employee Self Evaluation**
✔ **Step 5 - Supervisor Completes Evaluation**
✔ **Step 6 Manager/Employee Review Discussion**
✔ **Step 7 - Employee Acknowledgement**
✔ **Step 8 - Complete**

Step 1 – Your supervisor will begin the process by Identifying Goals and Projects, Job Responsibilities.

The evaluation contains two sections: this may vary depending on the process.

Goals and Objectives and Performance Factors.

Sam Performance - 2022/2023 Annual Review - Staff Supervisory

Start | I. Goals and Objectives | II. Performance Factors | Next steps

I. Goals and Objectives   ✔ Saved   Actions ▾

Supervisor Instructions : Please enter the goals that you and your employee agreed upon for the upcoming year. Please enter the name of the goal in Title Box and your expectations in the Measure Box.

Please add a minimum of 3 goals.

Employee Instruction- Please review the goals that have been entered by your supervisor

⊕ Add Goals and Objectives

← Back   Next →

Once you have completed everything your employee will receive an email notifying them that it is time to Review /Approve Goals or Complete their evaluation.

Sam Performance - 2022/2023 Annual Review - Staff Supervisory

Start | I. Goals and Objectives | II. Performance Factors | Next steps

                                            Last saved: 4 Nov 2021, 10:50am   Actions ▾

Dear Sam,

Your manager has completed adding your goals for the upcoming year. Please click next to review your Goals and Performance Factors.

This step is due to be completed by 31 Dec 2021.

Once you have completed reviewing the items, go to the last tab and click on Go to Next Step.

| **Employee:** Sam Performance | **Manager:** Joe Performance Supervisor |

JSU
JACKSONVILLE STATE UNIVERSITY

                                                                Next →

Step 2 – Employee Review and Acknowledges Goals (SED) -The employee will then log in as described above and click on their specific review.

NEW 2022/2023 Annual Review - Staff Supervisory

Current step: Employee Reviews and
Acknowledges Goals. (SED)

They will then come to the evaluation and all the section types

Sam Performance - 2022/2023 Annual Review - Staff Supervisory

| Start | I. Goals and Objectives | II. Performance Factors | Next steps |

I. Goals and Objectives   ✔ Saved Last saved: 4 Nov 2021, 10:50am   Actions ▼

Supervisor Instructions : Please enter the goals that you and your employee agreed upon for the upcoming year. Please enter the name of the goal in Title Box and your expectations in the Measure Box.

Please add a minimum of 3 goals.

Employee Instruction- Please review the goals that have been entered by your supervisor

🔒 **Complete Annual Education Training**
                    Measure

← Back   Next →
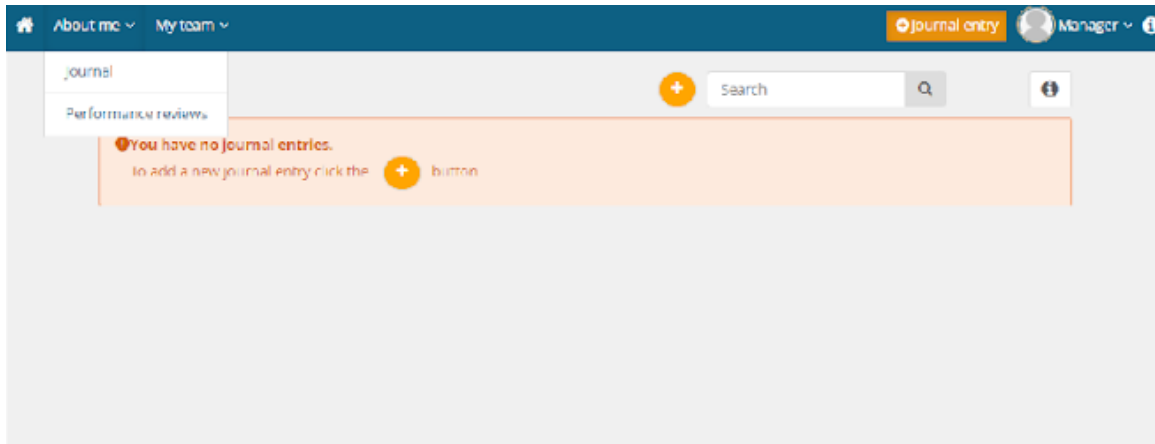
Using **Next** at the bottom of the page you can move through each tab

Tab 1 – Goals & Objectives – Employees will review the goals set for them.

Tab 2 –Performance Factors

Tab 3 –Next Steps

Step 3 – Review period – This period is the time when your employee can work on meeting their goals. During this time, both the supervisor and the employee can log in at any time and add Journal entries.

Also, during this period both employees and supervisors can use the **Everyday Performance App.**

Journal your performance

Observe and capture everyday successes in words (and photos), record conversations and keep track of your progress. Journal is available in desktop and mobile app.

Step 4 – Employee Completes Self Evaluation

- They will be able add comments to all areas
- They will be asked to rate the Goals and Objectives and provide their Overall Rating

Step 5 – Supervisor Completes Evaluation

- They will be able add comments to all areas
- They will be asked to rate the Goals and Objectives and provide their Overall Rating

Supervisor Instructions : Please rate your employee using the following scale.

Rating Scale:
5 - Outstanding - Consistently exceeds normal expectations and clearly and consistently demonstrates exceptional accomplishments. The quality and quantity of work is easily recognized as being truly exceptional.
4 - Exceeds Expectations - Frequently exceeds job requirements. Performs regularly above expected levels beyond expectations. Has a sustained quality of work that is uniformly high. Demonstrates high levels of effort, effectiveness and judgment with limited or no supervision. Achieves valuable accomplishments in several critical areas of the job.
3 - Achieves/Meets Expectations - Performance meets all the requirements of the position in the quality and quantity of work. Performance is described as good and solid while delivering thorough, timely results. Even though deviations may occur, the overall level of performance meets all the requirements of the position.
2 - Inconsistent Performance - Working toward gaining proficiency. Demonstrates satisfactory performance inconsistently. Achieves some but not all goals and is acquiring necessary knowledge and skills. This rating may be used for new employees when (s)he is still coming up to speed with their job duties as appropriate, based on his or her time in the position.
1 - Not Meeting Expectations/Needs Improvement -The quality of performance is inadequate and shows little or no improvement. Knowledge, skills, and abilities have not been demonstrated at appropriate levels.

Step 6-Manager/Employee Review Discussion

- During this time the manager and employee should meet to go over the review.

Step 7 - Employee Acknowledgement

  The employee will be able to review every section but will not be able to change anything. On the final page of the review (Next Steps) they will be able to leave a final comment**.**
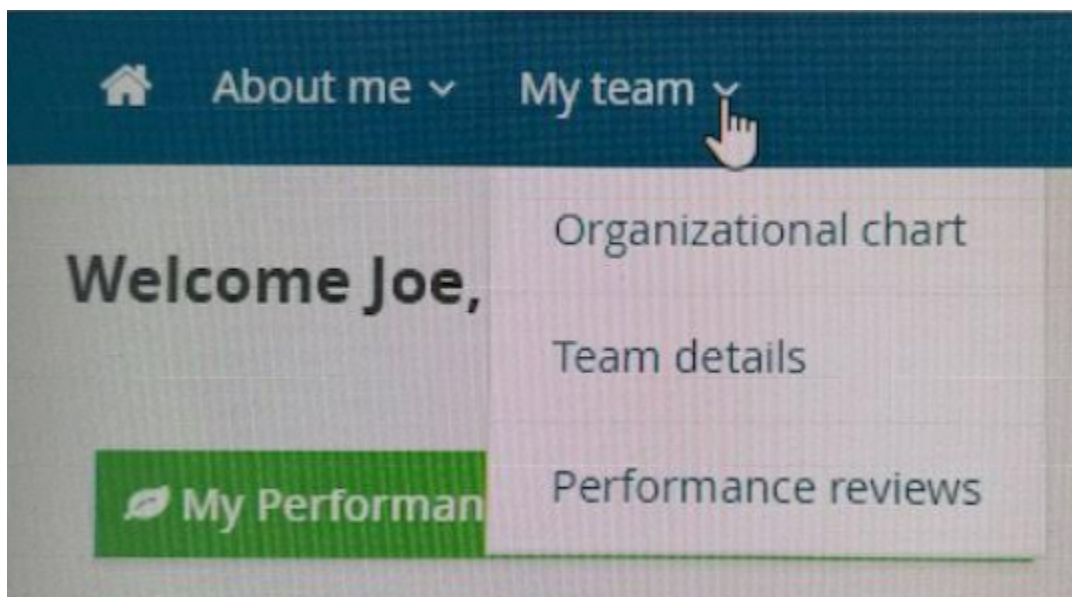
Final comments

Employee Performance

B *I* U | ≔ ∷ | ≣ ≣ ≣ ≣ | ⊞ ⊜ | ⤢ ⟨⟩ Source

Step 8 – Evaluation Complete

 To view the complete review –

Log in and go to My team-Performance reviews

Change the Status to Complete or All and click search

Locate your employee and click on View Report

You will be able to print and/or save to pdf is you would like, but it is not necessary as you will always have access to the evaluation as long as the employee reports to you.

Second Note: If for some reason you acquire a new employee or there is some kind of supervisor change as the Supervisor you are able to accept a review from a different supervisor or leave the review with the Existing Supervisor to finish.

Here is how you would see that information:

The new manager for an employee will now see an action alert for the employee allowing them to take ownership for the employee's performance review.
The action alert will be displayed when one of the above cases is detected, as follows:

- o   On My team > Organizational chart
- o   On My team > Performance reviews

On Dashboard > Team Performance Reviews widget on the dashboard. Notification contains a link that guides manager to My team performance reviews page

The Supervisor will click on **Action Review** then be presented with this message. You can choose to accept the evaluation or leave it with the existing supervisor