2012 Performance Excellence Online System

STEPS FOR SUPERVISORS
A New Look

Supervisor logs in using ACC e-ID.
When you log into the system, you will see a new home page that contains a welcome and information on the Faculty and Staff Evaluation Office.
The Help Section on the top right of the screen contains links to the following documents:

- Employee Quick Reference
- Employee Detailed Instructions
- Supervisor Quick Reference
- Supervisor Detailed Instructions

These documents will open up in a new window or tab depending on the internet settings.
Your Employees Section:
1. Click on the “Employee Evaluations” tab on the top of the screen to pull up your employees
2. When the list of your employees pulls up, you will notice four different columns.
   
   A. Employee Names
   
   B. The Status of the employees evaluation – Evaluate, Edit, View/Print Only
   
   C. Whether or not the employee has signed off on the evaluation
   
   D. Archives-The employee’s past evaluations
To view an employee’s past reviews, click on “Archives”

A list of that employee’s past reviews will appear. You are able to view and print these reviews.
As in the past, the evaluation process requires close employee-supervisor coordinator and communication. You, as the supervisor, are to meet with the employee to discuss and conduct an official performance review.

The meeting is to take place before you fill out the form, or fill the form out during the meeting with the employee.
Evaluating Your Employees
1. Click on “Evaluate” under the “Status” column
Please Note: The top of the Annual Performance Review Form will contain the Current Year Goals and Objectives. This will be the Goals and Objectives that were entered in last year’s Review. If Goals and Objectives were not entered in last year’s review, this section will be blank and information will need to be entered.
An evaluation for this year will populate.

2. Complete the Annual Performance Review Form Section. You may list strengths, areas for improvement, and add comments after each section if appropriate.

<table>
<thead>
<tr>
<th>Basic Job Requirements</th>
<th>Exceeds Requirements</th>
<th>Meets Requirements</th>
<th>Needs Improvement</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding of the Job: Does employee have adequate knowledge and skills related to the requirements to complete the variety of tasks required by the job?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of Work: Is the quality of work acceptable and does it meet established standards? Is the employee accurate?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Productivity and Efficiency: Does employee complete assignments on schedule, use resources wisely and manage time effectively?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reliability, Dependability: Does the employee follow through on assigned tasks to completion as expected? Is the employee reliable?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attendance: Does employee meet attendance requirements?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiative: Does the employee demonstrate initiative and resourcefulness by taking appropriate action with a minimum of direction as situations arise? Does the employee seek opportunities to learn new skills, and make suggestions for improving work processes?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safety: Does the employee work safely, follow safety rules, report unsafe working conditions/practices, and proactively prevent unsafe practices in the workplace?</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Servant Leadership: Does the employee demonstrate a desire to serve, show a willingness and readiness to provide good service to students, faculty, staff, and the public?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Servant Leadership: Does the employee exhibit honesty, integrity, and high ethical standards while performing their job duties?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional Development: Has employee completed annual requirements?</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:
3. There is a final section that allows you to add additional comments if needed.

4. Complete the Next Year Goals and Objectives section at the bottom.
5. At the end of the form, Click on “Save and Exit This Evaluation”. You will automatically be directed back to the home page after clicking the button.

**Please Note:** If you do not click on the “Save and Exit This Evaluation” button and return to the home menu, your responses will be lost.

The system is designed to save and go back to the homepage so that supervisors do not finalize the form until they meet with the employee to discuss the results. It is important to not sign this form at this point, because this will lock changes to the form.
Meeting with Employee

• The next step is to have the performance review meeting with your employee.

• Visit our evaluation home page for brief videos on conducting evaluation [www.austincc.edu/hr/eval/](http://www.austincc.edu/hr/eval/).
  
  — Before the supervisor signs, we strongly encourage that the final review of the form takes place in the presence of the employee, just like with a paper form.

PLEASE NOTE: Do not sign until both parties have seen it, reviewed it and are ready to sign. If the supervisor signs it, changes to the form will be locked.

If there are disagreements, either party needs to recur to the conflict resolution process just like in the past.
**Signing off on an Employee’s Review**

Now it is time to complete the employee’s evaluation and submit it for the employee’s review and sign off.

1. Log in to the 2012 Performance Excellence Online System
2. Go back to the “Employee Evaluations” tab and Click.

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![Performance Excellence Online System](image)
3. You will now see “Edit” in the status column instead of “Evaluate” for the employee you have saved an evaluation for.

Click on “Edit” for the employee.
3. Review the evaluation form and responses to the questions.

After filling out the evaluation, you have two options:
   1. To save and exit the evaluation without submitting or
   2. To save and submit the final evaluation (this option is **final**, once you submit the evaluation, you are not able to edit or make any changes to it)
To Save and Exit The Evaluation (without submitting):
The “Save and Exit This Evaluation (without submitting)” button allows you to save and come back to the evaluation as many times as you need to before finally submitting the employee’s evaluation.

Click “Save and Exit This Evaluation (without submitting)”
Once you click the “Save and Exit this Evaluation (without submitting)” button, you will notice that an evaluation for the employee has been entered/updated.

Please Note: This evaluation has not been submitted, it has just been entered/updated and saved.
To Save and Submit the Final Evaluation:
To submit the evaluation and make it available for the employee to review and sign off.

1. Click the small signature box next to the statement, “By checking this box I, Supervisor, am submitting the final evaluation for Employee on this day, Date of Sign off.”
2. Once you click on the small box, “Submit Final Evaluation” will appear. If you are sure you are ready to submit the final evaluation click the “Submit Final Evaluation” button. If you are unsure, do not click the button, go back and review the form and make any necessary changes.

**Please Note:** The “Submit Final Evaluation” button will not appear until you click the small signature box. Once you click “Submit Final Evaluation”, the evaluation **cannot** be edited and the evaluation will be sent to the employee to review.
3. After you click the “Submit Final Evaluation” button, you will see a copy of the review. When you see the following message in red, the evaluation has been submitted successfully.
Employee is Notified
After you sign off and submit the final evaluation, the employee will be notified via email that the evaluation is ready for him/her to review and submit.

An example of the email the employee will receive is below.

--------- Forwarded message ---------
From: <pep@austincc.edu>
Date: Tue, May 8, 2012 at 10:13 AM
Subject: Final Evaluation Submitted
To: [redacted]

[redacted] your manager has completed your final evaluation. Please login to the PEP system to submit your final evaluation.
Notification the Employee has Signed off on the Evaluation
You will receive notification via email that the employee has signed off and submitted their evaluation.

An example of the email you will receive is below.

From: [redacted]
Sent: Tuesday, May 08, 2012 11:01 AM
To: [redacted]
Subject: Employee has sign off on evaluation

Dear [redacted],

[redacted] has signed off on his/her evaluation. Please login to the PEP system to submit your final evaluation.
The next time you log into the Performance Excellence Online System and view your employee evaluations, you will see that the status of the employee’s evaluation is now “View/Print Only” and that “Employee Has Signed Off” is showing. This is indication that the review has been submitted successfully.

If you click on “View/Print Only” the 2012 Annual Employee Performance Review for that employee will appear in a new window/tab depending on the internet setting.
Questions

• If you have questions about the functioning of this website, please contact the help desk at helpdesk@austincc.edu or 223-HELP (4357).

• If an employee no longer works for you or you cannot evaluate him or her due to legitimate reasons (maternity leave, family medical leave, has not worked long enough under your supervision, or any other reason) please let the Faculty and Staff Evaluation Office know.

• It is preferable that you send an e-mail documenting these issues to your Faculty and Staff Evaluation Office at fseo@austincc.edu.
Faculty and Staff Evaluation Office

http://www.austincc.edu/hr/eval/

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