

## Performance Management Process (PMP)

### Performance Evaluation Form Instructions

Steps	Instructions
1	Login Banner Self Service using your <b>User ID</b> and <b>PIN</b> .
2	Click <b>Login</b> .

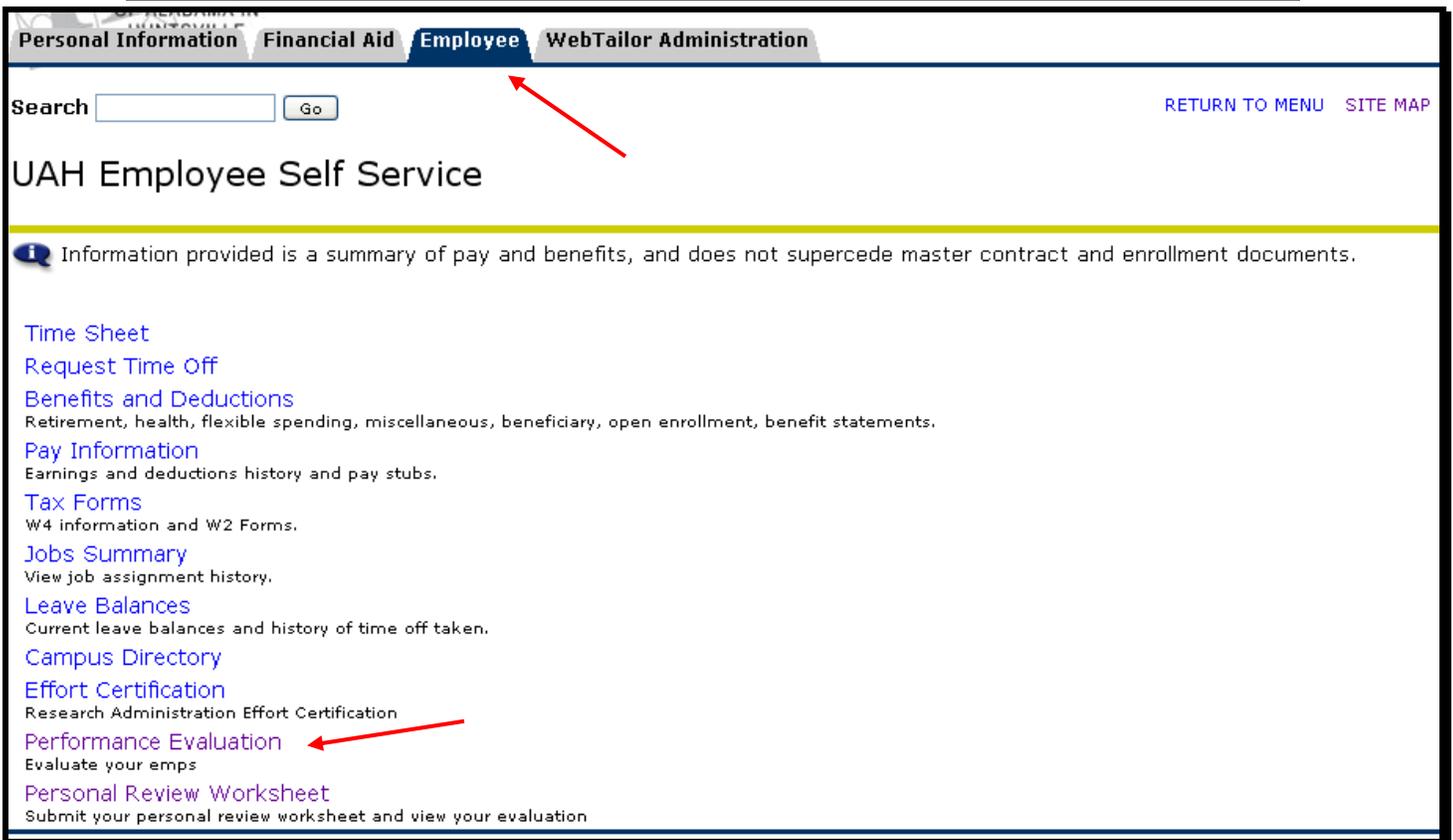
To protect your privacy, please Exit and close your browser when you are finished.

**User ID:**

**PIN:**

**RELEASE: 7.4**

Steps	Instructions
3	Click the <b>Employee</b> tab.
4	Click the <b>Performance Evaluation</b> link.



The screenshot shows the UAH Employee Self Service interface. At the top, there are navigation tabs: Personal Information, Financial Aid, **Employee**, and WebTailor Administration. A red arrow points to the 'Employee' tab. Below the tabs is a search bar with a 'Go' button and links for 'RETURN TO MENU' and 'SITE MAP'. The main heading is 'UAH Employee Self Service'. A yellow banner contains an information icon and text: 'Information provided is a summary of pay and benefits, and does not supercede master contract and enrollment documents.' Below this, a list of services is provided with red arrows pointing to 'Performance Evaluation' and 'Personal Review Worksheet':

- [Time Sheet](#)
- [Request Time Off](#)
- [Benefits and Deductions](#)  
Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, benefit statements.
- [Pay Information](#)  
Earnings and deductions history and pay stubs.
- [Tax Forms](#)  
W4 information and W2 Forms.
- [Jobs Summary](#)  
View job assignment history.
- [Leave Balances](#)  
Current leave balances and history of time off taken.
- [Campus Directory](#)
- [Effort Certification](#)  
Research Administration Effort Certification
- [Performance Evaluation](#)  
Evaluate your emps
- [Personal Review Worksheet](#)  
Submit your personal review worksheet and view your evaluation

## Performance Management Process (PMP)

### Performance Evaluation Form Instructions

Steps	Instructions
5	<b>Performance Evaluation:</b> Enter the <b>Banner ID (A#)</b> for your employee. <i>Then click on the current Year of the Evaluation. (For previous users only.)</i> To view previous evaluations, click on the year of the evaluation.
6	Click <b>Submit</b> .
	NOTE: “ <b>Important links</b> ” for instructions and definition of Performance Elements, rating, and recommended weightings.

### UAHuntsville Performance Evaluation

ONLINE PERFORMANCE EVALUATION  
**PERFORMANCE EVALUATION FORM**

clean up

Enter the Banner ID number of the employee you wish to evaluate:

A25129277

Submit

Important links:

- ◆ [Instructions](#)
- ◆ [Description of Performance Elements](#)
- ◆ [Description of Rating Terms](#)
- ◆ [Recommend Weightings](#)

Steps	Instructions
7	<b>Performance Evaluation Form:</b> The employee’s data (name, Banner ID, Job Title, Department, Appraiser and Date of Evaluation) and Personal Review Worksheet will populate.

ONLINE PERFORMANCE EVALUATION  
**PERFORMANCE EVALUATION FORM**

Employee Name:	Jane Test ChargerNet	Banner ID:	A25129277
Job Title:	Staff Assistant	Department:	Human Resources
Appraiser:	John Banner	Date of Performance Evaluation:	17-MAY-09

Your employee's Personal Review Worksheet

This is how your employee feels they have contributed:

Test - Mission, vision and goals

These are the barriers your employee has felt hindered them from their departmental expectations:

Test - Barriers - department performance expectations

These are the barriers your employee has felt hindered them from their personal expectations:

Test - Barriers - personal performance expectation

You could do the following to help:

Test - administrator help

These are your employee's goals for the next review period:

Test - Goals and planned accomplishments

These are any additional items they would like to discuss:

Test - additional items for discussion

Category	Next Year's Goals	Weight Range	Rating
Technical Knowledge and Skills Competence Comments	Goals:	Weight (15 - 50) 15 ▾	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1
Working Relationships Comments	Goals:	Weight (5 - 15) 5 ▾	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2

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Steps	Instructions
	For each Performance Element:
8	Enter <b>Comments</b> :
9	Enter <b>Goals: (Goals for Next Year)</b>
10	Select <b>Weighed Range:</b> (from the drop down menu)
11	Select <b>Rating:</b> (Click on the rating)
	Note: All fields must be completed. Click the Performance Element Link for additional description.

Category	Next Year's Goals	Weight Range	Rating
<p style="color: purple;">Technical Knowledge and Skills Competence</p> <p>Comments</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Goals:</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Weight (15 - 50)</p> <p>15 ▾</p>	<p><input type="radio"/> 5</p> <p><input type="radio"/> 4</p> <p><input type="radio"/> 3</p> <p><input type="radio"/> 2</p> <p><input type="radio"/> 1</p>
<p style="color: blue;">Working Relationships</p> <p>Comments</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Goals:</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Weight (5 - 15)</p> <p>5 ▾</p>	<p><input type="radio"/> 5</p> <p><input type="radio"/> 4</p> <p><input type="radio"/> 3</p> <p><input type="radio"/> 2</p> <p><input type="radio"/> 1</p>
<p style="color: blue;">Communications</p> <p>Comments</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Goals:</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Weight (5 - 15)</p> <p>5 ▾</p>	<p><input type="radio"/> 5</p> <p><input type="radio"/> 4</p> <p><input type="radio"/> 3</p> <p><input type="radio"/> 2</p> <p><input type="radio"/> 1</p>
<p style="color: blue;">Engagement and Accountability</p> <p>Comments</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Goals:</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	<p>Weight (15 - 50)</p> <p>15 ▾</p>	<p><input type="radio"/> 5</p> <p><input type="radio"/> 4</p> <p><input type="radio"/> 3</p> <p><input type="radio"/> 2</p> <p><input type="radio"/> 1</p>

## Performance Management Process (PMP)

### Performance Evaluation Form Instructions

Steps	Instructions
12	After completing each Performance Element fields, click <b>Save and Continue</b> at the bottom of the form.

Important links:

- [Instructions](#)
- [Description of Performance Elements](#)
- [Description of Rating Terms](#)
- [Recommend Weightings](#)

Steps	Instructions
13	The total <b>scores</b> should populate; including “Your employee scored xxx out of xxx; calculated score: “x”; This score is “xxx”; etc.

**ONLINE PERFORMANCE EVALUATION**  
**PERFORMANCE EVALUATION FORM**

Your employee scored 475 out of 500.  
 Calculated score: 5  
 This score is Exceptional  
 If you are not satisfied with this score, you may change it here:  
 (Note: you may only change the score by one point from the calculated score.)

5: Exceptional    If you wish to change your employee's score, you must provide justification in the field below.  
 4: Commendable  
 3: Satisfactory  
 2: Marginal  
 1: Unsatisfactory

<b>Code</b>	<b>Technical Knowledge and Skills Competence</b>				
Comments	Test Comments TKSC				
Goals	Test Goals TKSC				
	Weight	30	Rating	5	Total
					150
<b>Code</b>	<b>Working Relationships</b>				
Comments	Test Comments WR				
Goals	Test Goals WR				
	Weight	5	Rating	5	Total
					25

## Performance Management Process (PMP)

### Performance Evaluation Form Instructions

Steps	Instructions
14	The supervisor should conduct the employee's interview at this point (Click <b>Print</b> ) and return to the evaluation to sign.
	<b>Note:</b> You can <b>Edit, Sign, Print or Return to Menu</b> Edit - will return you back to the Performance Evaluation. Sign - will submit the form; editing is no longer an option. Print - will print the form. Return to Menu - will return to the Banner Self Service menu.

**\*NOTE:** If you edit the form, any development plan filled out will be erased. After you sign the form, you will no longer be able to edit it.

Steps	Instructions
15	Click <b>Sign</b> .
16	Enter your <b>PIN</b> .
17	Click <b>Submit</b> .

ONLINE PERFORMANCE EVALUATION  
**PERFORMANCE EVALUATION FORM**

By inputting your PIN number here you sign off that you have discussed this evaluation with the employee

Steps	Instructions
	It is time for the employee to return to Banner Self Service to sign the <b>Performance Evaluation</b> .  <b>NOTE:</b> Once the employee signs the <b>Performance Evaluation</b> , the supervisor can login again to review the employee's comments.

## Performance Management Process (PMP)

### Performance Evaluation Form Instructions

#### Change Score

Steps	Instructions
CS 1	<b>Change Score:</b> Change the rating, and Click <b>Change Score</b> . (You can only change the score by one point from the calculated score.)
CS 2	Enter <b>justification</b> in the comment box.
	<b>NOTE: A comment (justification) is required to change the score.</b>

**ONLINE PERFORMANCE EVALUATION**  
**PERFORMANCE EVALUATION FORM**

Your employee's score was changed to: 3  
 Their original score was: 2  
 If you are not satisfied with this score, you may change it here:  
 (Note: you may only change the score by one point from the calculated score.)

5: Exceptional  
 4: Commendable  
 3: Satisfactory  
 2: Marginal  
 1: Unsatisfactory

If you wish to change your employee's score, you must provide justification in the field below:  
 Developmental Plan - Justification after the change score was submitted.

#### Error Messages

Steps	Instructions
NOTE	<b>Error Messages</b> may populate after the form is Saved. Examples listed below: The weights must sum to 100. Select a value (rating) for Engagement and Accountability. Comments are required for Working Relationships. Enter goals for Technical Knowledge and Skills Competence.
EM 1	Errors messages must be corrected. To correct error messages, click <b>Edit</b> .

\*NOTE: If you edit the form, any development plan filled out will be erased.

You are unable to continue until the above errors are corrected.

### Performance Management Process (PMP)

Steps	Instructions
EM 2	The systems will return to the Performance Evaluation form for correction. Click <b>Save and Continue</b> after the correction is made.

### Development Plan

Steps	Instructions
DP 1	If the final score is 1 or 2, a <b>Development Plan</b> is required. Click <b>Development Plan</b> .

\*NOTE: If you edit the form, any development plan filled out will be erased.  
 Your employee's performance requires a development plan

Steps	Instructions
DP 2	Complete the <b>Development Plan</b> . Justification is required in the comment box. <b>All fields must be completed.</b>
DP 3	Click <b>Submit</b> . The system will merge the Development Plan into the Performance Evaluation form.

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### Performance Evaluation Form Instructions

PROFESSIONAL DEVELOPMENT PLAN			
Professional Development Plan			
Employee Name:	Jane Test ChargerNet	Banner ID:	A25129277
Job Title:	Staff Assistant	Department:	Human Resources
Appraiser:	John Banner	Date of Performance Evaluation:	13-MAY-09
<b>Section 1: Performance Improvement Plan</b>			
List the <b>specific</b> performance deficiencies or behaviors that need to be changed:			
Identify <b>specific</b> expected changes in performance or behaviors:			
List professional development/learning activities and/or resources that will be made available to the employee to assist in improving performance or correcting behaviors:			
<input type="button" value="Submit"/>			

**Congratulation! You have completed the Performance Evaluation Form!**