



PageUp Performance Evaluations, Terminology, and Glossary

Performance Evaluation Templates:	2
1. Performance Planning Process	2
2. Condensed Review Process:	2
3. Evaluation: No Self Eval:	3
4. 90-Day Evaluation:	3
Timelines:	4
1. Performance Planning Process:	4
2. Condensed Review Process:	4
3. Condensed Review Process:	5
6. Initial Probationary Period Review: (*90 days)	5
Terminology for Evaluation Phases:	5
1. Performance Planning:	5
2. Employee Sets Annual Goals	5
3. Goal Review:	5
4. Coaching/Goal Tracking:	6
5. Employee Self-Evaluation:	6
6. Supervisor Evaluation:	6
7. Employee/Supervisor Evaluation Discussion:	6
8. Employee Acknowledgement	6
9. Complete:	6

Performance Evaluation Templates:

There are four templates that supervisors can use on the Stillwater campus for managing and evaluating performance.

1. **Performance Planning Process:** This template is intended to be utilized as a performance management tool for supervisors who are looking to implement a 365-day performance management process encompassing job responsibilities, core competencies and goals in a collaborative format. This process enables the supervisor to manage performance throughout a full evaluation period, rather than only conducting an evaluation at the end of the period. This is accomplished by entering and discussing with the employee their job responsibilities, core competencies and goals at the **beginning** of the evaluation period. Then, progress meetings are held and easily document within the system during the Coaching/Goal Tracking step of the evaluation. The optional employee evaluation and the supervisor evaluation are completed at the **end** of the period.

The full **Performance Planning Process** helps supervisors manage performance throughout the year and consists of nine phases, as outlined below.

1. Performance Planning
2. Employee Sets Annual Goals
3. Goal Review
4. Coaching/Goal Tracking
5. Employee Evaluation
6. Supervisor Evaluation
7. Employee/Supervisor Evaluation Discuss
8. Employee Acknowledgement
9. Complete

2. **Condensed Evaluation Process:** This is a 45-day template. ***UHR recommends this process for supervisors who have an established tool for performance management and need to only complete an evaluation. Alternatively, this template may be used by those who are utilizing the performance planning process for their employees and have an employee who has started employment toward the end of the evaluation period.***

The **Condensed Review Process** enables supervisors to manage performance over a shorter timeframe during the year, consisting of six phases outlined below.

1. Performance Planning
2. Employee Self-Evaluation
3. Supervisor Evaluation
4. Employee/Supervisor Evaluation Discussions
5. Employee Acknowledgement
6. Complete

3. **Evaluation: No Self Eval:** This is the same process as the condensed review process, except without a self-evaluation step for the employee. This is a 38-day template. ***UHR recommends this process for supervisors who have an established tool for performance management and need to complete an evaluation. Alternatively, this template may be used by those who are utilizing the performance planning process for their employees and have an employee who has started employment toward the end of the evaluation period.***

The **Evaluation: No Self Eval** enables supervisors to manage performance over a shorter timeframe during the year without allowing the employee to do a self-evaluation, consisting of six phases outlined below.

1. Performance Planning
2. Supervisor Evaluation
3. Employee/Supervisor Evaluation Discussions
4. Employee Acknowledgement
5. Complete

4. **Initial Probationary Period:** Per policy 3-0741 all classified staff other than temporary appointees shall be given performance ratings within two to four weeks prior to the completion of three months of service following a new appointment or promotion.

The **90-Day Evaluation** is an 82-day template to assist supervisors manage performance during the probationary period following a new appointment or promotion and consists of five phases, as outlined below.

1. Performance Planning
2. Supervisor Evaluation
3. Employee/Manager Evaluation Discussion
4. Employee Acknowledgement
5. Complete

Timelines:

1. Performance Planning Process:

1. **Performance Planning:** Day 1-30 of the evaluation period (open for 30 days)
2. **Employee Sets Annual Goals:** Days 31-50 of evaluation period (open for 20 days)
3. **Goal Review:** Day 51-70 of evaluation period (open for 20 days)
4. **Coaching/Goal Tracking:** Day 71-250 of the evaluation period (generally open for 180 days. Can be adapted by the system automatically to accommodate the 365-day timeframe.)
5. **Employee Self Evaluation:** Day 251–285 of the evaluation period (open for 35 days)
6. **Supervisor Evaluation:** Day 286-320 of the evaluation period (open for 35 days)
7. **Employee/Supervisor Evaluation Discussion:** Day 321-350 of the evaluation period (open for 30 days)
8. **Employee Acknowledgement:** Day 351-364 of the evaluation period (open for 14 days)
9. **Complete:** Day 365

2. Condensed Review Process:

1. **Performance Planning:** Days 1-10 of the evaluation period (open for 10 days)
2. **Employee Self Evaluation:** Days 11-17 of the evaluation period (open for 7 days)
3. **Supervisor Evaluation:** Days 18-24 of the evaluation period (open for 7 days)
4. **Employee/Supervisor Evaluation Discussion:** Days 25-38 of the evaluation period (open for 14 days)

5. **Employee Acknowledgement:** (Days 39-45 open for 7 days)
6. **Complete**

3. No Self Eval:

1. **Performance Planning:** Days 1-10 of the evaluation period (open for 10 days)
2. **Supervisor Evaluation:** Days 11-17 of the evaluation period (open for 7 days)
3. **Employee/Supervisor Evaluation Discussion:** Days 18-31 of the evaluation period (open for 14 days)
4. **Employee Acknowledgement:** (Days 32-38 open for 7 days)
5. **Complete**

4. Initial Probationary Period Review: (*90 days)

1. **Performance Planning:** Days 1-55 of the evaluation period (open for 55 days)
2. **Supervisor Evaluation:** Days 56-65 of the evaluation period (open for 10 days)
3. **Employee/Supervisor Evaluation Discussion:** Days 66-75 of the evaluation period (open for 10 days)
4. **Employee Acknowledgement:** Days 76-82 (open for 7 days)
5. **Complete**

**Current policy 3-0741 requires 90-day reviews to be completed 2-4 weeks prior to the completion of three months of service following a new appointment or promotion.*

Terminology for Evaluation Phases:

1. **Performance Planning:** During this step, the supervisor will build out the subsequent sections with the employee's relevant job responsibilities, core competencies and goals for the year. This is a required step for all evaluation templates.
2. **Employee Sets Annual Goals:** During this step, the employees can set their annual goals for the evaluation period. Please note that the supervisor cannot access the evaluation during this step. This is an optional step.
3. **Goal Review:** During this step, the supervisor will view and assess the goals the employee has set (if applicable). Supervisors are encouraged to meet with the employee to discuss the goals and make any desired edits (if applicable).

4. **Coaching/Goal Tracking:** The supervisor is encouraged to update this section regularly with comments and attach supportive documents. This step is optional.
5. **Employee Self-Evaluation:** The employee will complete their self-evaluation by selecting ratings and adding comments. This is an optional step. If no action is taken, the review will advance to the supervisor evaluation without recording an employee self-evaluation.
6. **Supervisor Evaluation:** The supervisor will assign ratings to each job responsibility and core competency and add appropriate feedback/comments. This is a required step for all evaluation templates.
7. **Employee/Supervisor Evaluation Discussion:** The employee and supervisor will meet to discuss the evaluation. This is a required step for all evaluation templates.
8. **Employee Acknowledgement:** The employee will acknowledge that they have reviewed and discussed the evaluation with their supervisor. This is a required step for all evaluation templates. The acknowledgement does not indicate agreement with the evaluation. The employee may submit a written statement to their supervisor within ten working days, which will be attached to the evaluation report.
9. **Complete:** No further action needed.