How do I initiate an Annual Performance Evaluation?

**STEP 1  INITIATE THE EVALUATION – PRIOR GOALS STEP**

1. Navigate to the URL (https://careers.bowdoin.edu/hr/sso)
2. Click on **Go to Performance Evaluations (REVIEW)**
3. Review list of action items
4. Click on **Supervisor Initiates Evaluation** to open the review you wish to begin.
5. Previous goals (if any) will be displayed under the **Prior Goals** tab.
6. You may enter additional text in a previously stated goal or add the prior year’s goals (Click **Add Entry** if applicable). Click **Next** when all prior goals are included.
7. Click on Essential Functions tab to review essential functions for the position. If you notice that the essential functions are incorrect and the Job Description was recently updated, click on the dropdown Refresh Essential Functions, select the appropriate Job Description, and then click APPLY to display the updated essential functions.

8. Click the blue COMPLETE button. Confirm that you want to complete this step by clicking OK.

The Prior Goals Step is now complete and the employee self-evaluation is available to the employee to complete if desired.

**STEP 2 SUPERVISOR EVALUATION**

**SELECT CO-REVIEWER (Optional)**

1. Please include your supervisor as a co-reviewer to allow him/her to edit the evaluation as necessary. Some employees have more than one direct supervisor and in this case, the
Supervisor of record can add the other supervisor as a co-reviewer for the employee’s evaluation. Click **Add Co-Reviewer** and type in the name of the individual and a selection list will be displayed. Click on the correct name. When you click on **SAVE**, the name of the Co-Reviewer will be displayed.

A co-reviewer can view the entire self-evaluation and other supervisor’s evaluation. (s)he can edit the evaluation but there is no discrimination between the remarks of the original supervisor and the co-reviewer. If you want the employee to know whose remarks belong to which supervisor, you must denote that in the comments.

**SELECT MULTI-RATER (Optional)**

1. Supervisors may ask for additional feedback from others to attest to your employee’s performance. To request feedback, click on Multi-rater Feedback tab and select the name of the colleague(s) you would like to serve as multi-rater(s).
2. The colleague(s) you select as a multi-rater will receive a **Review** email requesting him/her to describe their experience in working with the individual over the past evaluation period. A comment box is provided to discuss specific examples of positive and negative interactions for the supervisor to use in the evaluation process.
3. **NOTE:** Multi-rater feedback is not visible to the employee and is not an actual printed page of the evaluation. It is simply a way to provide the supervisor with details of employee performance that (s)he may not have observed directly.
SUPERVISOR EVALUATION – PRIOR GOALS TAB

1. Use the text box underneath each goal to comment on performance toward and/or achievement of the goal.

SUPERVISOR EVALUATION – NARRATIVE, ESSENTIAL FUNCTION OR COMPETENCIES

2. Three styles of Supervisor Review are available. Select the appropriate tab for the style you want to use or combine elements of different styles. You may elect to select different styles for different employees.

- **Narrative**—use comments boxes to discuss employee’s performance. You may type directly into the box or cut and paste text. The text boxes will expand as you type into them.

- **Essential Functions**—Use a five point scale to rate the employee’s performance in terms of his/her essential functions and support your rating with comments. There is also the option to comment separately on the employee’s initiative, problem solving, and team participation

- **Competencies**—Select 4 or more behavioral competencies and discuss the employee’s performance with respect to the definitions and expectations of each competency.

OVERALL RATING

3. Determine one of two Overall Ratings for the employee: Successful or Needs Improvement. Click SAVE DRAFT.
If you have assigned your supervisor as the co-reviewer, **DO NOT CLICK COMPLETE!!!** Click **SAVE DRAFT** and notify the co-reviewer that you are finished and the evaluation is ready for his/her review. Either the supervisor or the co-reviewer can click **COMPLETE** and send the review to the next step - **Evaluation Review Meeting.**

**FUTURE GOALS**

4. Click the **Future Goals** tab.
5. Enter individual goals separately for the next evaluation period.
6. These goals will automatically show as **Prior Goals** when the employee’s next evaluation is initiated.

⚠ Check the left navigation bar for the employee’s self-evaluation. If the word “Self-Evaluation” is blue, you can click on it to review the employee’s completed review. You can copy and paste information from the self-evaluation into your supervisor evaluation.

**ATTACHMENTS (OPTIONAL)**

1. **If you are adding any attachments you must add them PRIOR to clicking on COMPLETE.** Click the Attachments tab. Type in a name for the attachment and/or a description. Click **Browse** to find the attachment saved on your computer and click on it. Then click **UPLOAD FILE.**
2. To include additional attachments, click **NEW ATTACHMENT.** **Please note:** *Your employee and co-reviewer will be able to view your attachments.* When you have uploaded all documents, click **SAVE DRAFT** or click **COMPLETE** (if the entire evaluation is finished).
STEP 3   HR/Final Approval

Depending on your division, either your Department Head or Human Resources will approve the evaluation at this step. Please note that approvers at this step are reviewing for compliance issues only.

STEP 4   EVALUATION REVIEW MEETING

You may now set up an Evaluation Review Meeting to discuss the evaluation with the employee face to face. At the Evaluation Review Meeting step, once the supervisor clicks COMPLETE, the employee has access to view the evaluation.

⚠️ Only click COMPLETE when you are ready for the employee to see the review.

STEP 5   EMPLOYEE ACKNOWLEDGEMENT

After the evaluation is discussed with the employee, the employee will have to log into Review to Acknowledge that (s)he met with the supervisor to discuss performance. This step completes the evaluation process.