

Review

careers.bowdoin.edu/hr

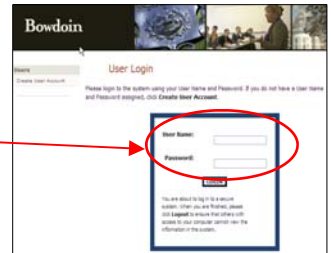
QUICK REFERENCE GUIDE for Supervisors
Annual Performance Evaluations

When one of your staff members' annual evaluations is due, you will receive an email reminder from Human Resources.

- make certain that the job description is updated **BEFORE** you begin the review process
- decide if you want the employee to complete a self-evaluation as part of the complete annual performance evaluation
- ask your employee to meet with you to discuss the completed, approved review and certify online that you met.

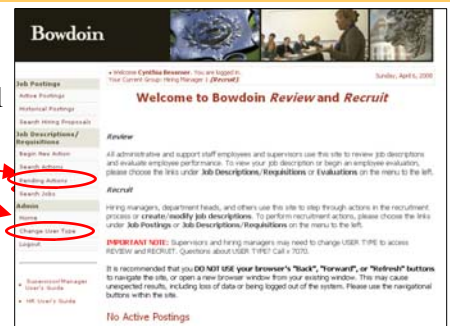
I. How to Log In

1. Navigate to the **Review** log-in page (<https://careers.bowdoin.edu/hr>). You can find this page linked under HRforYOU on the Human Resources web page, or you can type the above address directly into the address field of your internet browser.
2. Log into **Review** using your Bowdoin email username and password. If you do not know your username and password, contact the IT Help Desk at x3030 for assistance.
3. Human Resources has already created user accounts for all employees. If you are unable to log in successfully using your Bowdoin username and password, please call the HR Assistance Line (x7070).
4. It is recommended that you **DO NOT USE** your browser's "Back", "Forward", or "Refresh" buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.



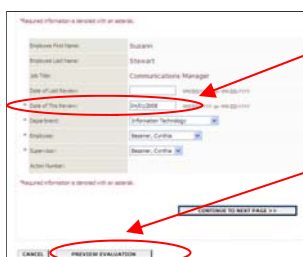
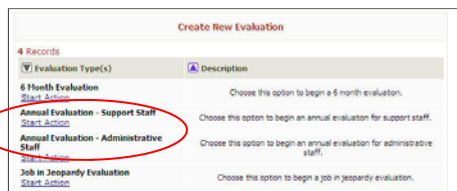
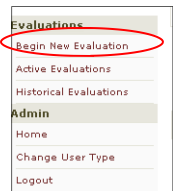
II. Review the Job Description

1. Your staff member's evaluation will be based on his/her current job description. To review, click on **Change User Type** on the left. Click on the **Hiring Manager or Department Head** button, then **Change Group**. The **Recruit** menu will be displayed on the left. Click on **Search Jobs** option.
2. Select the appropriate job description to review by entering the title of the employee you will be reviewing. When the job description is displayed, review it online or print it. If revisions are required, follow separate **Quick Reference Guide for Updating a Job Description**.

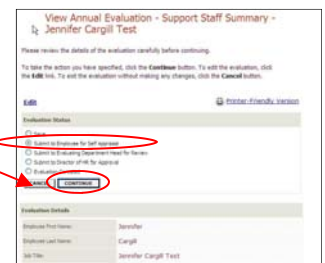


III. How to Request the Employee Self-Evaluation for an Annual Evaluation

1. After you log in, click on **Change User Type** on the left. Make sure the **Supervisor** user type is selected. Select **Begin New Evaluation** from the options on the left.
2. Select the type of annual evaluation you wish to begin (Support staff or Administrative staff). Search for the appropriate employee's name.



3. On the Evaluation Details Tab, enter the date of this review. At the bottom of the page click on **Preview Evaluation**. When the status choices are displayed, click on **Submit to Employee for Self-Evaluation**. Click **Continue**, and on the next page, click **Confirm**.



An automatic email will be sent to the employee with instructions. While the employee is completing the self-evaluation, you will not be able to access it. When the employee re-submits it to you, you will receive email notification.

IV. Completing the Annual Evaluation Tab by Tab

Each evaluation is divided into tabs or pages. Fields marked with an asterisk (*) are required. **Continue to Next Page** moves you to the next tab.

EVALUATION DETAILS - The Evaluation details are provided. Enter the date of the review. If you are requesting a self evaluation, click on **Preview Evaluation** then click on the radio button **Submit to Employee for Self Evaluation**. If you want to draft your portion of the evaluation first, click on the next tab. After a self-evaluation is completed, an additional tab will display at the top of the page.

PRIOR GOALS AND OBJECTIVES AND KEY ACCOMPLISHMENTS - List three or more goals and objectives that had been set for this employee, as well as key accomplishments. Click the appropriate radio button rating for the past evaluation period. Use the text box for additional comments to support the rating. If the rating is "Needs Improvement" or "Highly Commendable" you must enter justification in the comments field.

PERFORMANCE AGAINST EXPECTATIONS - For support staff, a list of **essential functions** will be displayed. For each essential function, click on **Edit**, to give an appropriate rating and comments if necessary. As you rate each function a table will be created.

For administrative staff, the **job summary** will be displayed. Use the **Comments** field to describe employee performance throughout the rating period. Use specific examples to support your rating.

SUPERVISORY SKILLS - The fields on this screen are optional since not every employee has supervisory responsibilities. However, if the employee supervises other staff or students, it is appropriate to complete ratings and/or comments for all three sections: Delegation, Coaching, and Communication.

OVERALL RATING - Based on all of the information on the evaluation, enter an overall rating for the employee's performance for the evaluation period. Supportive comments are required. If the overall rating is "Needs Improvement", a Job in Jeopardy form must also be completed.

GOALS AND OBJECTIVES - Use this tab to "build" at least three goals and objectives for the next evaluation period. To add each new goal: Click the **Add New Entry** button. Indicate the priority with a display number, the specific goal, plan and the expected outcome. You may edit, view and delete entries as necessary. As you complete each goal or objective, a table will be completed.

ATTACH DOCUMENTS - If you have documents to attach to this evaluation, click on **Attach** for each one (maximum of 5 documents).

If you have the document in a file saved on your computer, browse to the file and click **Attach Document**, or you may type in or copy and paste additional information into the text box. Click **Attach** and then click on **Confirm** on the next page. Documents will be converted to .pdf files.

COMMENTS - This optional tab may be used to enter additional comments. If you have no additional comments, click on **Continue to Next Page** to send the evaluation forward for review.

V. Move the Evaluation into Workflow

1. When the evaluation is completed, you may review it on screen, print a copy, or edit it as necessary. If you had not previously asked the employee for a self-evaluation, you may request it now. The employee will not be able to see any of the information you have entered into the evaluation. You will receive an email when the employee submits his/her self-evaluation back to you. You will not be able to edit the self-evaluation in any way.
2. If the evaluation is ready for department head review and approval, Click on **Submit to Evaluating Department Head. Continue** and then **Confirm** on the next page.
3. Your department head may review the evaluation, edit it, or send it back to you for further editing (in which case you will be notified via email.) The department head may also approve the evaluation and send it directly to Human Resources. Once Human Resources has reviewed it, you will receive email notification that it is ready for delivery to the employee.

VI. Delivery and Certification of the Evaluation

The following evaluation is at the status of: Submitted to Supervisor for Delivery and Certification

The performance evaluation for this employee has been reviewed and approved.

Important!! DO NOT MOVE THE EVALUATION TO THE NEXT STATUS UNTIL AFTER YOU HAVE MET WITH THE EMPLOYEE!!

Employee First Name: Jennifer
 Employee Last Name: Cargill
 Title: Jennifer Cargill Test
 Position Number: 020144
 Evaluation Type: Annual Evaluation - Support Staff

Please log into <http://careers.bowdoin.edu/hr>.
 Click on the Active Evaluations button on the left menu.
 - Review and print a copy of the full evaluation (use the printer-friendly link at the top right)
 - Contact the employee and schedule a time to meet
 - After meeting with the employee change the status to Submit to Employee for Certification.
 - Ask the employee to log into Review to certify that you met and discussed the evaluation
 - If requested, provide a printer friendly version of the evaluation to the employee or demonstrate how the employee may retrieve a copy

For questions, contact the Human Resources Assistance Line (x7070).
 Human Resources

1. When you receive the delivery and certification email, follow the instructions within the email. Review the evaluation before scheduling a time to meet with your employee.
2. You may provide a copy of the evaluation to the employee in advance of your meeting, or at the meeting. Note: The bottom of the printed copy will show the progression of the evaluation through the workflow.
3. **AFTER the meeting**, change the status to **Submit for Employee Certification**, Continue and Confirm.
4. The employee will have to log in, click on **Active Evaluations**, navigate to the **Comments** tab to add any additional comments and electronically certify that he/she met to discuss the evaluation. All fields except the Comments are View Only. The certification does not imply that they agree or disagree with the contents of the evaluation, only that you met to discuss it.
5. The employee will submit it back to you for final review.

VII. Submission to HR for Final Processing

1. If the employee added in any comments during the certification, review them by moving to the Comments tab. The employee was not able to make any edits or changes other than add comments; No edits or changes are allowed.
2. **Continue to the Next Page to Submit for Final HR Processing.**
3. If an issue arose and additional information needs to be added to the review, Human Resources may still attach a document at this point. Otherwise, Human Resources will archive the evaluation so that it is available as a **Historical Evaluation**.

VIII. Historical Evaluations

1. If you log in, select **Historical Evaluations** from the left menu, select the employee and the evaluation you wish to view, note that you cannot make any edits (No status changes available). The evaluation is view only to all roles (employee, supervisor, department head, Human Resources).
2. All evaluations completed in **Review** (6-month, annual, job in jeopardy) will be available in **Historical Evaluations**.