FAQs – Performance Evaluations

What form do I use and when is the evaluation due?

See the Evaluation Matrix

What are the steps in the performance evaluation process?

Step 1: Supervisor completes performance evaluation. Supervisor and employee meet to discuss performance evaluation. Supervisor submits evaluation to employee for review.
Step 2: Employee reviews evaluation online and returns to supervisor.
Step 3: Supervisor submits evaluation to unit/department head for final approval.
Step 4: Unit/department head reviews and approves.

How does a supervisor complete a performance evaluation in GreatJobs?

- Login to GreatJobs at https://sso.tamus.edu.
- Change your user type to "Supervisor" (if necessary).
- "Begin New Performance Evaluation"
- If completing the online evaluation, select "Nonfaculty performance evaluation." If uploading an alternated approved evaluation form, select "Other Performance Evaluation Forms."
- Select your employee's name from the drop-down box. You may "Search" without entering an employee name and pull-up a list of all your employees. You may then select the employee upon which to begin the evaluation.
- Enter the evaluation details and then continue through each of the tabs.
- Comments are required after each section. "No Comment" is not an appropriate entry.
- An entry is required on the "Performance Objectives and Development" tab.
- When fields on each tab have been completed, "Save Without Submit."
- Meet with the employee to discuss the performance evaluation.
- Return to the online performance evaluation by going to your "Pending Evaluations." "View" the performance evaluation. Edit as necessary by selecting "Edit" in the top left corner of the evaluation.
- "Send for Employee Signature"
- You will receive an email notification when the employee has "signed" the evaluation and returned it to you.
- Return to the online performance evaluation by going to your "Pending Evaluations." Select "Send to Unit Head" to forward the evaluation to the unit/department head for final approval.
- You will receive an email notification when the unit/department head has approved the evaluation in GreatJobs.

How does a supervisor or unit contact upload a performance evaluation in GreatJobs?

Ensure you have an electronic version of the performance evaluation saved so that you can upload into GreatJobs.
- Login to GreatJobs at https://sso.tamus.edu.
- Change your user type to "Supervisor" (if necessary).
- "Begin New Performance Evaluation"
- Select "Other Performance Evaluation Forms"
- Select your employee's name from the drop-down box. You may "search" without entering an employee name and pull-up a list of all your employees. You may then select the employee upon which to begin the evaluation.
- Enter the evaluation details and then continue through the tabs.
- On the "Attach Documents" tab, upload the electronic version of the performance evaluation. Be sure to confirm after attaching the document.
- An entry is required on the "Performance Objectives and Development" tab. If performance objectives and development information are shown on the written performance evaluation, add an entry stating "document attached on next tab."
- When fields on each tab have been completed, "Save Without Submit."

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- Meet with the employee to discuss the performance evaluation.
- Return to the online performance evaluation by going to your "Pending Evaluations." "View" the performance evaluation. Edit as necessary by selecting "Edit" in the top left corner of the evaluation.
- "Send for Employee Signature"
- You will receive an email notification when the employee has "signed" the evaluation and returned it to you.
- Return to the online performance evaluation by going to your "Pending Evaluations." Select "Send to Unit Head" to forward the evaluation to the unit/department head for final approval.
- You will receive an email notification when the unit/department head has approved the evaluation in GreatJobs.

How does a unit/department head give final approval on a performance evaluation in GreatJobs?

- Login to GreatJobs at https://sso.tamus.edu.
- Change your user type to "Unit/Department Head" (if necessary).
- Select "Pending Evaluations."
- "View" the performance evaluation. Review the evaluation. To add comments, select "Edit" in the top left corner of the evaluation and add comments on the "Performance Summary" tab in the section titled "Unit Head or Other Administrator Comments."
- Select "Evaluation Complete" or "Finalize."
- An email notification will be sent to the supervisor indicating the performance evaluation has been finalized.

Can a supervisor edit the performance evaluation after it has been routed/sent to the employee or unit/department head?

Yes. Ideally, the supervisor will complete the evaluation and discuss it with the employee prior to sending to the employee for signature. This allows the supervisor to edit the evaluation based on feedback from the employee, if warranted, before the evaluation is sent. However, both the employee and the unit/department head have the option to return an evaluation to the supervisor for editing. The evaluation then has to be routed back to the employee for signature and the routing process begins again.

What if I am both the supervisor and the unit/department head?

You will need to use two different user types, "Supervisor" and "Unit/Department Head" to complete the evaluation process. You will create the evaluation as shown above for the supervisor. Upon return of the evaluation by the employee, you will submit the evaluation to the unit/department head. Following the instructions shown above for unit/department head, you will give final approval of the evaluation.

If I'm a supervisor and have completed the evaluation online, do I still need to meet with my employee?

Absolutely! The online performance evaluation does not replace the critical discussion between supervisor and employee regarding performance.

If I begin a performance evaluation and "Save Without Submit" to return to it later, where will I find it?

The saved performance evaluation will be in your "Pending Evaluations."

Can the employee edit the evaluation?

No. However, the employee does have the opportunity to add comments and/or attach a document with additional comments. The employee also has the ability to return the performance evaluation to the supervisor for editing.

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Can the unit/department head edit the evaluation?

No. However, the unit/department head does have the opportunity to add comments and/or attach a document with additional comments. The unit/department head also has the ability to return the performance evaluation to the supervisor for editing.

What if the employee refuses or is unable to sign the evaluation?

The supervisor can go to "Pending Evaluations" and choose "Send to Unit Head." This will forward the performance evaluation to the unit/department head for final approval even if the employee has not signed or returned it.

If we currently use a different, approved performance evaluation form, must we now use the competency-based online performance evaluation?

No. If you are using another approved form, you may continue to use that form. You may upload the alternate form and route for approval online and/or store the signed document online in GreatJobs.

Can we use the online competency based evaluation for 02 ADLOC employees?

Yes

How do I save a performance evaluation so that I can finish completing it at another time?

- Complete all required fields (designated by the asterisk next to the field) on the tab. Do not "Continue to Next Page."
- Choose the "Save and Stay on This Page" button at the bottom of the screen.
- Choose "Save Without Submit." The saved evaluation will now be available under "Pending Evaluations."
- When logging back in, you will find the saved evaluation under "Pending Evaluations," where you will click "View" to open, then "Edit" to open the pending evaluation for your completion.

Can I update the employee's position description during the evaluation process?

If the employee's position description needs to be updated to reflect job duties performed during the past year, be sure to update the position description before beginning the performance evaluation. Once a performance evaluation is in progress, the corresponding position description cannot be updated. The "fix" is to cancel the evaluation in progress, complete an update of the position description, and begin the performance evaluation again.

What are the overall performance evaluation rating factors?

Outstanding: Employee's job performance is exceptional in comparison to job requirements, essential duties, and/or responsibilities, and, if applicable, in comparison to other employees performing similar duties. Performance at this level consistently exceeds expectations and makes significant contributions to the mission of the unit.
Highly Effective: Employee's job performance consistently meets and frequently exceeds job requirements, essential duties, and/or responsibilities. Performance at this level is considered above average in comparison to job requirements and to others performing similar duties, when applicable.
Effective: Employee consistently meets all job requirements, essential duties, and/or responsibilities in a competent manner. This is the minimum expected level of performance for employees.
Needs Improvement: Employee meets some, but not all job requirements, essential duties, and responsibilities. Guidance and/or coaching are needed for improvement.
Unsatisfactory: Employee does not meet job requirements, essential duties, and/or responsibilities for position. Immediate and significant improvement is needed.

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Please Note: An employee receiving a *Needs Improvement* or *Unsatisfactory* rating should receive a specific explanation of areas needing improvement and an action plan and timetable for achieving improvement. A *Needs Improvement* or *Unsatisfactory* rating may also establish grounds for termination if previously identified problems are not corrected. If you have questions on completion of the Performance Evaluation form, please contact Texas A&M AgriLife Human Resources Office.

What are the competencies on which an employee will be evaluated?

Continuous Learning and Job Knowledge
Rate the employee's demonstrated job knowledge. Consider factors such as:
Time in the position
Extent to which efforts are made to stay up-to-date
Extent to which employee is consulted by others on technical matters
Rate the employees job performance. Consider factors such as:
Use of resources and technology
Initiative to seek feedback and development opportunities to improve performance
Willingness to accept coaching and implement changes to improve work performance
Level of supervision required
Building Relationships
Meets customer and stakeholder needs in a timely and courteous manner
Identifies and shares information with all relevant individuals and groups
Communication
Organizes and verbally communicates ideas and information clearly
Expresses disagreement in a constructive, non-confrontational manner
Listens attentively and responds appropriately
Dependability and Organizational Support
Follows instructions and responds promptly to management direction
Meets attendance and punctuality guidelines - keeps commitments
Follows policies and procedures
Takes responsibility for won actions
Teamwork, Cooperation, and Diversity Commitment
Contributes to building a positive team spirit
Works actively to resolve conflicts
Supports diversity initiatives and respects and values individual differences
Advancement Orientation
Remains open to new ideas and modifies behavior or work methods in response to new information or changing circumstances
Performs work with individual motivation, self-confidence, and minimal instruction
Judgment and Decisions
Exhibits sound and accurate judgment
Includes appropriate people in decision-making process
Leadership and Initiative
Demonstrates high standards of conduct and personal accountability
Anticipates needs and takes action without waiting to be told
Supervisors: Managing and Supervising People (if applicable)
Provides timely direction and gains employee commitment
Maintains open communications and solicits feedback from subordinates as appropriate
Provides opportunities for subordinates' skill development and encourages professional growth
Recognizes and rewards contributions
Delegates work assignments as appropriate
Motivates others to perform well