

# 2015

## **Employee Self Evaluation**



Revised: 1/6/2015



#### **Self Evaluation Process**

At the beginning of an annual evaluation cycle, it is a "best practice" for you (the Employee) and the Manager (Rater) to meet in order to set the competencies and goals for the upcoming year. You will be evaluated on these same competencies and goals at the end of the evaluation cycle in the Performance Evaluation process.

The Self Evaluation portion of a Performance Evaluation provides you with an opportunity to share your perspective with the Manager (Rater) of how well you met the criteria that was predefined for each competency and goal. You will be able to rate your performance on every individual criteria for each section. Each section will also have an overall section summary rating, where you can enter your overall performance rating for the specific section, and a comments box.

Sections of the Self Evaluation:

- Statewide Competency
- Agency Competencies
- Classification Competencies
- Goals and Performance Expectations

**NOTE**: Not all Agencies will be using the Self Evaluation process, and some agencies may not use all sections listed in the evaluation process.

#### **Enter Self Evaluation Information**

After the Manager (Rater) enters the performance criteria into an evaluation document, you will receive an email notification stating that you are able to view the document and can now complete the Self Evaluation portion of the Performance Evaluation process.

#### **Step I – Locate the Performance Evaluation Document**

- 1. Navigate to your performance evaluation: *myOhio > Career Resources > My Performance Documents > Current Documents*.
- 2. Click the *Document Type* hyperlink for the appropriate document type.

Performance Documents				Customize   End   🛤	First 🕅 1-7 of 7 🕅 Last
Document Type	Begin Date	End Date	Job Title	Status	Manager
PROBATIONARY RE	VIEW 04/11/2027	04/30/2027	Human Capital Management Mgr	In Progress	

#### 3. Click the *Start* hyperlink next to the *Complete Self Evaluation* step.

Document Progress					
Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria	4	Completed	12/30/2011	View	
Complete Self Evaluation	0	Not Started	09/30/2012		Start
Review Manager Evaluation	0	Not Started	10/15/2012		



#### **Step II – Enter Statewide Competency Rating and Comments**

 Starting with Section 2 – Statewide Competencies, click the Expand hyperlink to expand all competencies of the section. **NOTE**: The State of Ohio defines **Competencies** as measurable patterns of knowledge, skills, and abilities and other characteristics designed to reflect the behaviors in how employees complete their assignments. Some competencies, like Customer Focus, apply to every job in the state. Others, like Repairing and Maintaining Electronic Equipment, only apply to specific jobs.

#### Section 2 - STATEWIDE COMPETENCIES

Expand Collapse

▶ CUSTOMER FOCUS

#### NOTE:

The Statewide Competencies section contains the competencies that are required for all State of Ohio employees. Currently, the State of Ohio has only chosen to evaluate Customer Focus in this section pursuant to ORC 121.91 (A).

At this time, the State of Ohio defines Customer Focus as follows:

Focuses on the customer, whether internal or external, by understanding the needs of the customer and responding in a timely fashion, responding to customer feedback, and seeking out help and information when needed.



2. Assign ratings to each individual competency by clicking the appropriate *radio button*; type related comments into the *Comments* fields.

Contra Co	Collapse	
CUSTOMER FO	CUS	
Description : Cu valuations. The vith the custom lemonstrated th lemonstration s meliness of the issistance to en valuation shou based on custor	stomer Focus is required for use in all state of Ohio performance Customer Focus competency centers on the employee interaction er. It can be either an internal or external customer. It must be at the employee understands the need(s) of the customer. The hould include the employee level of knowledge, the tone and the employee responses. The employee should know when to seek sure the customer has an overall positive experience. Finally, the d include examples that the employee evaluates his/her practices ner feedback.	
INDIVIDU Individua functions Exempt * Providi technica * Remai * Monitoo program * Recom improve	AL CONTRIBUTOR I Contributor level positions are assigned specialized or programs. Employees may be in a Bargaining Unit or dassification. Scope of work activities may include: ng guidance, consultation or expert advice in specialized or professional area(s) ning current in area of expertise/body of knowledge ing, maintaining and/or inspecting assigned persons, s or equipment mending and influencing standard practices and process nents	
1. Does Not M	eet O 2. Meets Expectations O 3. Exceeds Expectations	
Comments:	Click inside this box to type comments	S.

NOTE: You can spell check any text box that

has the spellcheck icon next to it. Click this icon and a new screen will appear with applicable spelling suggestions.



If you would like to see the definitions of the rating levels, click the *Rating Description* icon.

🔾 1. Does Not Meet	O 2. Meets Expectations O 3. Exceeds Expectations
Rating:	
Comments:	

Either assign the rating by clicking the appropriate *radio button* on this page and then clicking the *Select Proficiency* button or click the *Return to previous page* hyperlink to rate the competency there.

2 1		Fails to meet standards (e.g., employees with this rating fail to satisfactorily
	. Does Not Meet	perform most aspects of the position, performance levels are below established requirements for the job, employee requires close guidance and direction in order to complete routine assignments).
<b>)</b> 2	Meets Expectations	Fully meets standards (e.g., achieves acceptable standards of peformance, expectations and requirements, results can be expected which are timely and accurate, performance constitues what is expected of a qualified, experienced employee performing in this position).
3	. Exceeds Expectations	Exceeds standards (e.g., consistently goes above the communicated expectations of the job responsibility or goal, demonstrates a unique understanding of work beyond assigned area of responsibility, achievements are obvious to subordinates, peers, managers and customers).



#### **Step III - Enter Agency Competency Ratings and Comments**

 On Section 3 – Agency Competencies, click the Expand hyperlink to expand all competencies within the section. **NOTE:** If an agency chooses to rate all of its employees on specific competencies in addition to the statewide competencies, those competencies will appear in this section. This section is optional, so there may be no competencies available to rate.

= Section 3	AGENCY COMPETENCIES	
Expand	Collapse	
► COMMUNIC	ATION	

2. Assign ratings to each individual competency by clicking the appropriate *radio button*; type related comments into the *Comments* fields.

	ENCY COMPETENCIES
Expand	Collapse
	G OUT SIDE THE ORG
Description : Comm representing the orgother state or local), person, in writing (e	nunicates with people outside of the organization (agency), ganization (agency) to customers, the public, government (federal, , and other external sources. Information can be exchanged in <u>electronic or hard copy), or by telephone or email</u> .
Rating:	
Comments:	Click inside this box to type comments
	✓





#### **Step IV – Enter Classification Competency Ratings and Comments**

1. On Section 4– Classification

*Competencies,* click the *Expand* hyperlink to expand all competencies within the section.

**NOTE:** If an agency chooses to rate all of its employees in a specific classification on competencies in addition to the statewide and agency-wide competencies, those competencies will appear in this section. This section is optional, so there may be no competencies available to rate.

Section 4 - CLASSIFICATION COMPETENCIES				
Expand	<u>Collapse</u>			
▶ сом	IUNICATE SPV/PEERS/SUBS			

2. Assign ratings to each individual competency by clicking the appropriate *radio button*; type related comments into the *Comments* fields.

Section 4 - Cl	LASSIFICATION COMPETENCIES	
Expand	Collapse	
- COMMUNICATE	SPV/PEERS/SUBS	
Description : Provi subordinates (staf person.	ides information to supervisors, coworkers (peers), and f) by telephone, in written form (electronic or hard copy), or in	
O 1. Does Not Meet	○ 2. Meets Expectations ○ 3. Exceeds Expectations	
Rating:		
Comments:	Click inside this box to type comments	
	V	



#### **Step V – Enter Competency Summary Ratings and Comments**

1. Assign a rating to the competency summary by clicking the appropriate *radio button*; type related comments into the *Comments* fields.

- Section :	Section 5 - COMPETENCY SUMMARY		
Expand	Collapse		
COMPETENC	Y SUMMARY		
O 1. Does Not	Meet $\bigcirc$ 2. Needs Improvement $\bigcirc$ 3. Meets Expectations $\bigcirc$ 4. Exceeds Expectations $\bigcirc$	5. Outstanding	
Rating:			
Comments:	Click inside this box to type comments	×.	

#### **Step VI – Enter Goals and Performance Expectations Ratings and Comments**

#### On Section 6 – Goals and Performance Expectations, click the Expand hyperlink to

expand the section.

**NOTE:** Goals are the improvements you should make to your work activities or the products you create that could help you make a better or larger contribution toward achieving your agency's purpose. Improvement goals can be different for different employees.

**Performance expectations** are the expectations for work product quantity, quality, timeliness, and results that apply to regular and routine job duties. Performance expectations are the same for every employee performing the same job.

Goals and performance expectations may be set by your supervisor, agency management, or statewide management.





2. Assign ratings to each individual goal or performance expectation by clicking the appropriate *radio button*; type related comments into the *Comments* fields.

Case Processir	g Performance Expectation	
Description : Process 10 case processed cases	s daily and maintain, at minimum, a 95% accuracy rating for 3.	
O 1. Does Not Me	eet O 2. Meets Expectations O 3. Exceeds Expectations	
Rating:		
Comments:	Click inside this box to type comments	S.

### **Step VII – Enter Goals and Performance Expectations Summary Ratings and Comments**

1. Assign a rating to the goals and performance expectations summary by clicking the appropriate *radio button*; type related comments into the *Comments* fields.

- Section	- GOALS & PERFORMANCE EXPECTATION	IS SUMMARY
Expand	Collapse	
GOALS & PE	RFORMANCE EXPECTATIONS SUMMARY	
O 1. Does Not	Meet O 2. Needs Improvement O 3. Meets Expectations O 4. E	xceeds Expectations $\bigcirc$ 5. Outstanding
Rating:		
Comments:	Click inside this box to type comments	œ
		F

**NOTE:** Section 8 – Overall Performance Summary will be blank for all employee self evaluations. You will not need to provide an overall rating when you complete your self-evaluation.



2. Click the *Save* button at bottom of page. You then receive confirmation that the changes have been saved.

Performa	ice Document - PROBAT	IONARY RE	EVI	EW				
Self-Evaluation								
PROBATI	ONARY REVIEW: 11/22/20	 )22 - 11/29/2	202	2				
Author:		Role:						
Status:	In Progress	Due Date:	1	0/30/2022				
Approval:	Not Submitted							
EMPLOYER	DATA							
Empl ID:								
Agency:	Administrative Ser	vices						
Division:	DAS301805	Office	of	Talent Management				
Job Code:	64615							
Supervisor	ID:							
You have successfully saved your evaluation.								
Enter ratings and comments for each section where applicable. To save changes made to the								
evaluation select the Save button. When finished updating the evaluation, select the Complete								
button to mai	ce the document available to you	ır manager.						
Save	Complete	<i>a</i> E	-	Return to Document Detail				

3. If you wish to print the document, click the *Print* icon. It will open a PDF version of the performance self-evaluation document that you can either print or save to your computer.





4. Click the *Complete* button. A new screen will appear with a prompt to click a second complete button because you will not be able to edit the document after you complete it. This second complete screen is your chance to return to the document if you are not actually finished with it. If you wish to return to the document, click the *Cancel* button instead of the *Complete* button.

Performance Document - PROBATIONARY REVIEW
Complete Evaluation
You have almost finalized your evaluation. If you have no further changes, select the Complete button at the bottom of this page.
Once you select Complete your evaluation will be finalized and sent to your manager for review.
Complete Cancel

5. Click the **OK** button.

Performan	ce Document - PROBATIONARY REVIEW
Complet	te Evaluation Confirmation
Your evaluatio	n is finalized and marked as "Complete".
	1
OK	J



#### **Step VIII - Document Details Page**

1. The *Document Details Page* will automatically display. The "Status" for the Complete Self Evaluation step will change to "Completed" as illustrated in the screen shot below. You will also receive a confirmation that the evaluation has been completed.

ocument De	etails						
You have succes	REVIEW:	11/22	/2022 - 11/2	29/2022 n.			
Performance Docur	nent Details						
Employee: Document Type: Template: Manager:	PROBATIONARY REVIEW PROBATION PERFORMAN REVIEW		Y REVIEW RFORMANCE	Job Title: Period: Document ID: Status:	Human Capital Management Mg 11/22/2022 - 11/29/2022 23649 In Progress		
Document Progres	s						
Step			Status	Due Date	Action	Next Action	
Establish Evaluation Criteria		~	Completed	01/28/2022	View		
Complete Self Evaluation		1	Completed	10/30/2022	View		
Review Manager Evaluation		0	Not Started	11/14/2022			

- 2. The Manager (Rater) will receive an email notification that you have completed a self evaluation.
- 3. The Self Evaluation portion of the Performance Evaluation process is now complete.