2015

Employee Self Evaluation

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 | Find |	First 1-7 of 7 Last
Document Type	Begin Date	End Date	Job Title	Status	Manager	
PROBATIONARY REVIEW	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	✔ Completed	12/30/2011	View	
Complete Self Evaluation	○ Not Started	09/30/2012		Start
Review Manager Evaluation	○ Not Started	10/15/2012		

Step II – Enter Statewide Competency Rating and Comments

1. 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.

> **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.

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

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.

Step III – Enter Agency Competency Ratings and Comments

1. 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
   ▶ COMMUNICATION
```

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

```
▽ Section 3 - AGENCY COMPETENCIES
 Expand                 Collapse
   ▽ COMMUNICATING OUTSIDE THE ORG
   Description : Communicates with people outside of the organization (agency),
   representing the organization (agency) to customers, the public, government (federal,
   other state or local), and other external sources. Information can be exchanged in
   person, in writing (electronic or hard copy), or by telephone or email.
   ○ 1. Does Not Meet  ○ 2. Meets Expectations  ○ 3. Exceeds Expectations
   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.

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

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.

Step VI – Enter Goals and Performance Expectations Ratings and Comments

1. 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.

> **Section 6 - GOALS & PERFORMANCE EXPECTATIONS**
>
> Expand   Collapse
>
> ▼ Case Processing Performance Expectation
>
> Description :
> Process 10 cases daily and maintain, at minimum, a 95% accuracy rating for processed cases.
>
> ○ 1. Does Not Meet ○ 2. Meets Expectations ○ 3. Exceeds Expectations
> Rating:
>
> Comments: Click inside this box to type comments
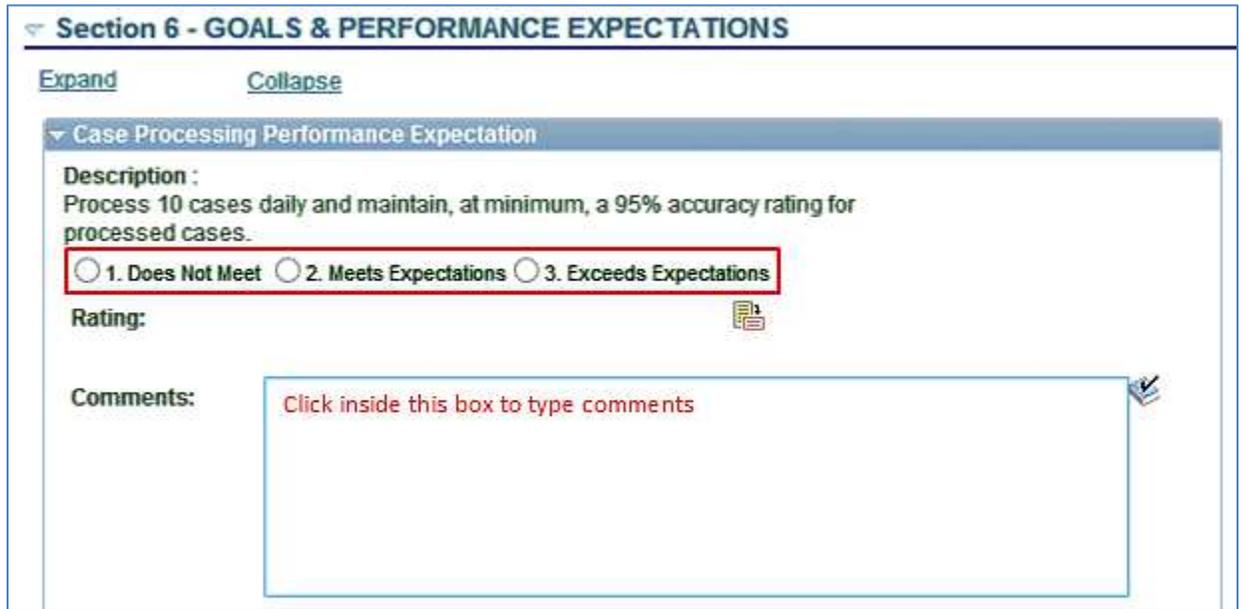
Step VII – Enter Goals and Performance Expectations Summary Ratings and Comments

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 7 - GOALS & PERFORMANCE EXPECTATIONS SUMMARY**
>
> Expand   Collapse
>
> GOALS & PERFORMANCE EXPECTATIONS SUMMARY
> ○ 1. Does Not Meet ○ 2. Needs Improvement ○ 3. Meets Expectations ○ 4. Exceeds Expectations ○ 5. Outstanding
>
> Rating:
> Comments: Click inside this box to type comments
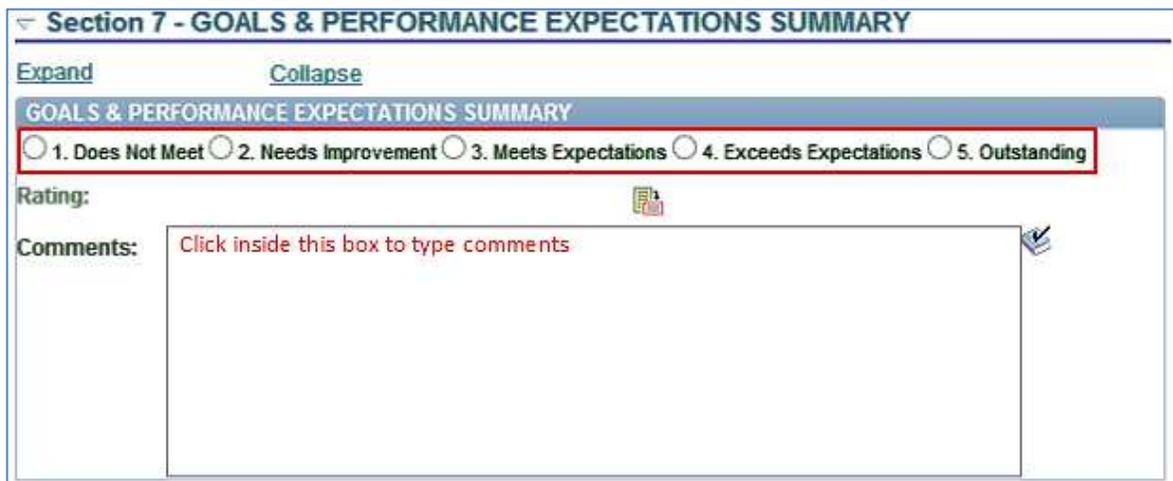
NOTE: Section 8 – Overall Performance Summary will be blank for all employee self evaluations. You will not need to provide an overall rating when you complete your self-evaluation.

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

Performance Document - PROBATIONARY REVIEW

Self-Evaluation

PROBATIONARY REVIEW: 11/22/2022 - 11/29/2022

Author:		**Role:**	
Status:	In Progress	**Due Date:**	10/30/2022
Approval:	Not Submitted		

▼ EMPLOYEE DATA

Empl ID:

Agency: Administrative Services

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 make the document available to your manager.

Save	Complete	🖨 ▤	**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.

🖨 ▤   **Return to Document Detail**

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.

Performance Document - PROBATIONARY REVIEW

Complete Evaluation Confirmation

Your evaluation is finalized and marked as "Complete".

| OK |

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.

Current Performance Documents

Document Details

PROBATIONARY REVIEW: 11/22/2022 - 11/29/2022

☑ You have successfully completed your evaluation.

Performance Document Details

Employee:		Job Title:	Human Capital Management Mgr
Document Type:	PROBATIONARY REVIEW	Period:	11/22/2022 - 11/29/2022
Template:	PROBATION PERFORMANCE REVIEW	Document ID:	23649
Manager:		Status:	In Progress

Document Progress

Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✔	Completed	01/28/2022	View	
Complete Self Evaluation	✔	Completed	10/30/2022	View	
Review Manager Evaluation	○	Not Started	11/14/2022		

Return to Select Documents

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.