



# Annual Employee Performance Evaluation Forms Information and Instructions for Use

Two versions of the Annual Employee Performance Evaluation forms are available for your use. The differences between these two versions are outlined below:

<b>Microsoft Excel Version:</b>		<b>Microsoft Word Version</b>	
<b>Pros</b>	<b>Cons</b>	<b>Pros</b>	<b>Cons</b>
<ul style="list-style-type: none"> <li>All forms are held within one document.</li> <li>Math calculations are automatic. Points assigned on the Plan and the Continuation page are combined. Once ratings are given on each of these pages a score will transfer over to the Final Evaluation page, also automatically checking the ratings category box.</li> <li>Duplicate entry is not necessary. Once the employee's name and personnel # are entered on the Plan (Data Only) tab, that information is automatically generated on all other documents.</li> </ul>	<ul style="list-style-type: none"> <li>User proficiency with Microsoft Excel could hinder ease of use.</li> </ul>	<ul style="list-style-type: none"> <li>Most user friendly for those not comfortable with Microsoft Excel, although the Excel version has been designed for easy navigation.</li> </ul>	<ul style="list-style-type: none"> <li>All math calculations must be completed manually.</li> <li>Forms are not contained within a single document.</li> </ul>
--- TIPS FOR USE ---			
DO NOT TYPE IN ALL CAPS. This reduces your typing space and can be difficult to read.			
Use the [Tab] key to move from one cell to the next in either version.			

*The following instructions are only intended for "use" of the Word version of the forms. They do not replace any process instructions currently in place for performing employee performance evaluations. Please note that instructions for use of the Excel version are contained within that document.*

## **Instructions for using the Microsoft Word Version:**

### **Performance Plan (parts A and B):**

1. Begin your performance plan with part A. You'll need to complete the employee information at the top.
2. Proceed with listing job duties, points, and the expectations to "adequately meet" each duty's requirements for this first category.

You'll need to add up the points manually to ensure that you assign a minimum of fifty (50) points to this category. You'll have at least fifty (50) points left to assign on part B for a total of one hundred (100) points.

3. Once finished, save a copy of this document for the final evaluation.
4. Complete your performance plan with part B. You'll need to enter the employee's name and personnel number at the top of the page.
5. Continue with listing job duties, points, and the expectations to "adequately meet" each duty's requirements for the remaining three (3) categories.

Again, you'll need to add up the points manually to ensure that a minimum of five (5) points have been assigned to each of these categories. The combined total from parts A and B must equal one hundred (100) points.

6. Once finished, save a copy of this document for the final evaluation.

#### Interim Reviews:

##### 1<sup>st</sup> and 2<sup>nd</sup>-

1. Each interim review is available on a separate document. You'll need to open and use the appropriate form that corresponds with the given review period.
2. Enter the employee's name and personnel number.
3. Enter the review period "from" and "to" dates.
4. Enter your review as it corresponds to each of the categories.
5. Once finished, save a copy of this document for future reference/record keeping.

##### 3<sup>rd</sup>-

1. Open the 3<sup>rd</sup> Interim Review form.
2. Enter the employee's name and personnel number.
3. Enter the review period "from" and "to" dates.
4. Check the appropriate box relating to the final review period. Depending on the selected box, you may or may not need to provide additional information.
5. Once finished, save a copy of this document for future reference/record keeping.

#### Final Evaluation:

1. Open the Performance Plan (part A) and enter the rating number under the corresponding rating column for each duty.
2. Multiply the points assigned to each duty by the rating. This score should be entered in the last column under "TOTAL" for each duty.
3. Once finished, add all of the scores in that column and enter that into the "Category Total" box at the bottom.
4. Once finished, save a copy of this document for future reference/record keeping.

\*Follow this same process for the Performance Plan (part B) and any continuation pages you may have.

5. Open the Final Evaluation document.
6. Add the individual category scores from the Performance Plan (parts A and B) and the continuation page(s) together and enter each total in the score box (A).
7. Add all of the category scores together to get and enter the final score TOTAL.
8. Check the rating box (B) that corresponds with the final score total.
9. Once finished, save a copy of this document for future reference/record keeping.