

# 2016

## Employee Self Evaluation



Revised:

6/29/2016

## Self Evaluation Process

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

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 that you 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
<a href="#">PROBATIONARY REVIEW</a>	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	<a href="#">View</a>	
Complete Self Evaluation	○ Not Started	09/30/2012		<a href="#">Start</a>
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 section content.

**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.

- Assign ratings to the competency by clicking the appropriate **radio button**; type related comments into the **Comments** field.

Section 2 - STATEWIDE COMPETENCIES

Expand
Collapse

CUSTOMER FOCUS

**Description :** Customer Focus is required for use in all state of Ohio performance evaluations. The Customer Focus competency centers on the employee interaction with the customer. It can be either an internal or external customer. It must be demonstrated that the employee understands the need(s) of the customer. The demonstration should include the employee level of knowledge, the tone and the timeliness of the employee responses. The employee should know when to seek assistance to ensure the customer has an overall positive experience. Finally, the evaluation should include examples that the employee evaluates his/her practices based on customer feedback.


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**INDIVIDUAL CONTRIBUTOR**  
Individual Contributor level positions are assigned specialized functions or programs. Employees may be in a Bargaining Unit or Exempt classification. Scope of work activities may include:


- \* Providing guidance, consultation or expert advice in specialized technical or professional area(s)
- \* Remaining current in area of expertise/body of knowledge
- \* Monitoring, maintaining and/or inspecting assigned persons, programs or equipment
- \* Recommending and influencing standard practices and process improvements


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☐ 1. Does Not Meet
☐ 2. Meets Expectations
☐ 3. Exceeds Expectations

Rating:



Comments:

Click inside this box to type comments


**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 definition of each rating, click the [Rating Description](#) icon.

☐ 1. Does Not Meet ☐ 2. Meets Expectations ☐ 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.

Proficiencies		
	Rating	Description
<input type="radio"/>	1. Does Not Meet	Fails to meet standards (e.g., employees with this rating fail to satisfactorily 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).
<input checked="" type="radio"/>	2. Meets Expectations	Fully meets standards (e.g., achieves acceptable standards of performance, expectations and requirements, results can be expected which are timely and accurate, performance constitutes what is expected of a qualified, experienced employee performing in this position).
<input type="radio"/>	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).

[Select Proficiency](#)

[Return to previous page](#)

### Step III – Enter Agency Competency Ratings and Comments

1. In **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 competency, those competencies will appear in this section. This section is optional, so there may be no competencies available to rate.

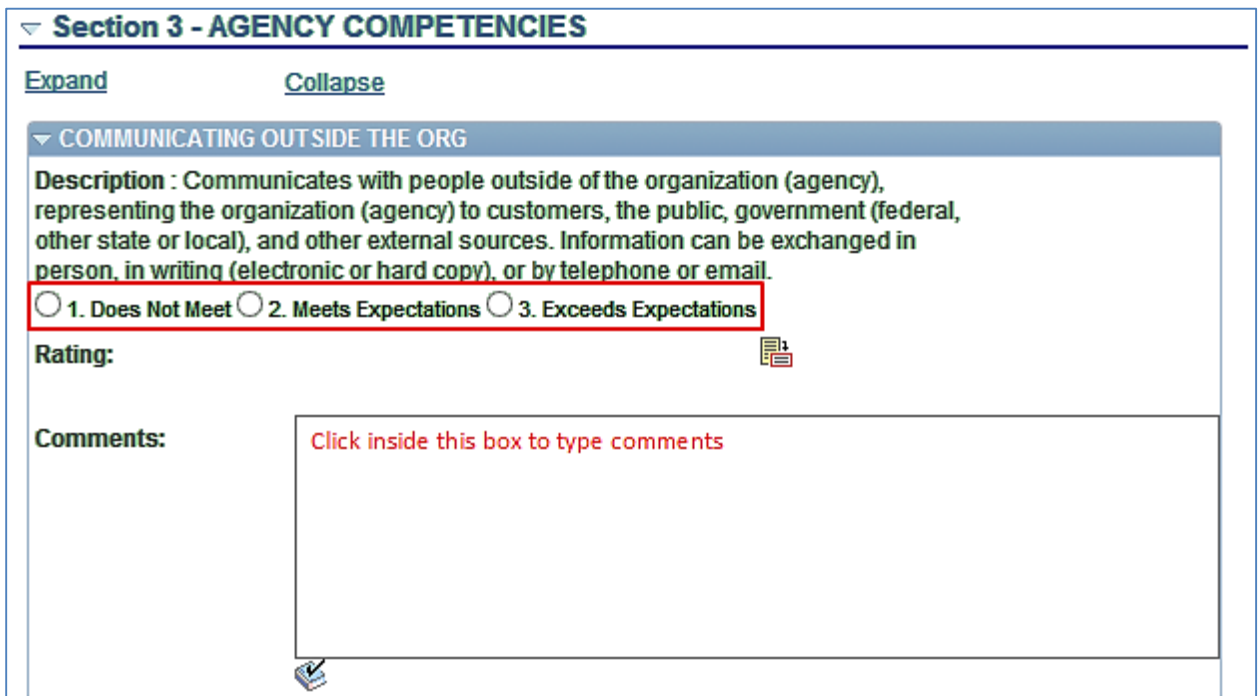


Section 3 - AGENCY COMPETENCIES

[Expand](#) [Collapse](#)

COMMUNICATION

2. Assign ratings to each individual competency by clicking the appropriate [radio button](#); type related comments into the appropriate [Comments](#) field.




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:**





## Step IV – Enter Classification Competency Ratings and Comments

1. In **Section 4– Classification Competencies**, click the [Expand](#) hyperlink to expand all competencies within the section.



Section 4 - CLASSIFICATION COMPETENCIES

[Expand](#) [Collapse](#)

▶ COMMUNICATE SPV/PEERS/SUBS

2. Assign ratings to each individual competency by clicking the appropriate [radio button](#); type related comments into the appropriate [Comments](#) field.



Section 4 - CLASSIFICATION COMPETENCIES

[Expand](#) [Collapse](#)

COMMUNICATE SPV/PEERS/SUBS

Description : Provides information to supervisors, coworkers (peers), and subordinates (staff) by telephone, in written form (electronic or hard copy), or in person.

☐ 1. Does Not Meet ☐ 2. Meets Expectations ☐ 3. Exceeds Expectations

Rating: 

Comments: 

Click inside this box to type comments



## 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** field.

**NOTE:** Section 5 summarizes all individual ratings recorded in Sections 2 (Statewide Competencies), 3 (Agency Competencies), and 4 (Classification Competencies).



Section 5 - COMPETENCY SUMMARY

[Expand](#) [Collapse](#)

**COMPETENCY SUMMARY**

☐ 1. Does Not Meet ☐ 2. Needs Improvement ☐ 3. Meets Expectations ☐ 4. Exceeds Expectations ☐ 5. Outstanding

Rating: 

Comments:

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

1. In **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.



Section 6 - GOALS & PERFORMANCE EXPECTATIONS

[Expand](#) [Collapse](#)

▶ Case Processing Performance Expectation



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


**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:**  

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

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


**NOTE:** Section 7 summarizes all individual ratings recorded in Section 6 (Goals & Performance Expectations).


**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:**  

**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.

- Click the [Save](#) button at bottom of page. You then receive confirmation that the changes have been saved.

### Performance Document - PROBATIONARY REVIEW

## Self-Evaluation

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

<b>Author:</b>		<b>Role:</b>	
<b>Status:</b>	In Progress	<b>Due Date:</b>	10/30/2022
<b>Approval:</b>	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

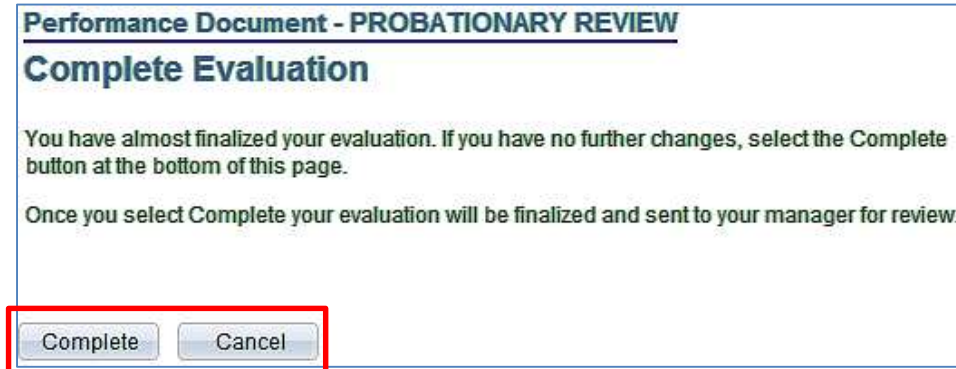
Return to Document Detail

- 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

- 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.

- Click the **OK** button.



**Performance Document - PROBATIONARY REVIEW**

### Complete Evaluation Confirmation

Your evaluation is finalized and marked as "Complete".

## 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**

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

Document Progress				
Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✓ Completed	01/28/2022	<a href="#">View</a>	
Complete Self Evaluation	✓ Completed	10/30/2022	<a href="#">View</a>	
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.