



Employee Performance Management System (EPMS) Evaluation and Planning Form

Purpose: The purpose of EPMS is to provide summary feedback to staff members on their performance for the year, and to provide clear goals and development plans for the coming year. EPMS evaluations will be used to make pay and other personnel decisions.

Instructions: Please fill in all areas as instructed. Print completed form for signatures, staple, and return to the Office of Human Resources.	
Employee Name	Position
Employee ID (CWID)	Supervisor Name
Department	Review Type:
Review Period From: To:	<input type="radio"/> Annual Review <input type="radio"/> Planning Stage Document <input type="radio"/> Trial Period <input type="radio"/> Probationary Period <input type="radio"/> Short Year Review
Evaluation Levels and Sample Criteria:	
<p>Exceptional (E) (<u>Note:</u> If Rating an Employee Exceptional you MUST ADD Comments.)</p> <p><i>Work that is characterized by exemplary accomplishments throughout the rating period; performance that is considerably and consistently above the requirements of the job duties.</i></p>	<ul style="list-style-type: none"> • Individuals who significantly and consistently exceed expectations and role requirements • Exceeds goals set for the year • Demonstrates exceptional depth and breadth of role knowledge, highly recognized by others within the University community • Demonstrates role model behavior for other supervisors/staff members to emulate
<p>Successful (S)</p> <p><i>Work that meets the requirements of the job duties.</i></p>	<ul style="list-style-type: none"> • Individuals who regularly meet and sometimes exceed expectations and role requirements • Meets goals set for the year • Possesses full depth and breadth of role knowledge • Perceived by peers, managers, students and other customers as collaborative, skilled and harmonious • Consistently interacts effectively with peers and/or management
<p>Unsuccessful (U) (NOTE: Before Rating an Employee Unsuccessful, you MUST contact HR for WRITTEN APPROVAL.)</p> <p><i>Work that fails to meet the requirements of the job duties.</i></p>	<ul style="list-style-type: none"> • Work is regularly incomplete and/or does not meet the minimal standards for quantity or quality; often misses deadlines • Takes little to no initiative, even with prompting • Requires more than the expected level of supervision due to lower quality work or level of learning required to complete role successfully • Inconsistent interactions with peers and/or management

Section 1A Evaluation of Job Responsibilities:

Job Functions and Objectives / Success Criteria		Comments / Actual Performance	Eval Level
Job Function			<input type="radio"/> E
Success Criteria			<input type="radio"/> S <input type="radio"/> U
Job Function			<input type="radio"/> E
Success Criteria			<input type="radio"/> S <input type="radio"/> U
Job Function			<input type="radio"/> E
Success Criteria			<input type="radio"/> S <input type="radio"/> U
Job Function			<input type="radio"/> E
Success Criteria			<input type="radio"/> S <input type="radio"/> U
Job Function			<input type="radio"/> E
Success Criteria			<input type="radio"/> S <input type="radio"/> U
Job Function			<input type="radio"/> E
Success Criteria			<input type="radio"/> S <input type="radio"/> U

Supervisor Initials

Date

Employee Initials

Date

Section 1B: Performance Characteristics

Employee Role: <i>Is the employee a supervisor?</i> Yes <input type="radio"/> No <input type="radio"/>	Rating
1.	<input type="radio"/> S <input type="radio"/> U
2.	<input type="radio"/> S <input type="radio"/> U
3.	<input type="radio"/> S <input type="radio"/> U
4.	<input type="radio"/> S <input type="radio"/> U

Section 1C: Overall Evaluation (to be completed by rating supervisor)

Summary Evaluation <input type="radio"/> E <input type="radio"/> S <input type="radio"/> U	Summarize the employee's performance, discussing areas of strength and areas for improvement. Provide Overall Evaluation.
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Employee comments on any aspect of the performance evaluation.

Section 2A: Signature Page

Planning Stage Acknowledgment: The rating supervisor should meet with the employee to discuss the job duties, performance characteristics, objectives, and success criteria for the next annual rating period. The original document should be retained by the rating supervisor for use during the next annual rating process. A copy should be given to the employee.

Rating Supervisor: _____

Date: _____

Reviewer: _____

Date: _____

Employee: _____

(Signature by the employee indicates Planning Stage was reviewed.)

Date: _____

Performance Evaluation Acknowledgment: The EPMS form must be signed by the rating supervisor, reviewer, and employee. The original document should be forwarded to the Office of Human Resources. A copy should be given to the employee.

Rating Supervisor: _____

Date: _____

Reviewer: _____

Date: _____

Employee: _____

(Signature by the employee indicates evaluation was received.)

Date: _____