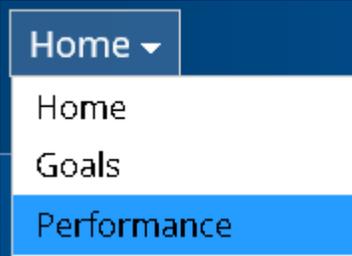


UK Online PE System – Completing the Online PE for Employees

This guide focuses on the steps employees need to take to complete the Online PE process. Accessing the UK Online PE System and basic navigation are covered in prior user guides. To access these guides, visit the Resources tab on the HR Performance Matters webpage: <http://www.uky.edu/pe/resources-training-materials>

PE forms are not available year-round. PE forms are generated and released one to two months before the PE due date. For Campus employees, the release date is in mid-December; for UK HealthCare employees, the release date is in May.

Accessing your Performance Evaluation Form

<p>On your Home page, in the Navigation Menu,</p> <ul style="list-style-type: none">• Click on Home,• Then choose the Performance option	 <p>The screenshot shows a navigation menu with a 'Home' dropdown menu open. The 'Performance' option is highlighted in blue. Arrows point from the text in the left column to the 'Home' and 'Performance' options in the menu.</p>										
<p>On your Performance page, your PE form can be found in the Inbox of the In Progress section.</p> <ul style="list-style-type: none">• Click on the link in the Form Title column to access your PE form	 <p>The screenshot shows the 'My Forms' page. On the left is a sidebar with 'In Progress' selected, containing an 'Inbox' section. The main area shows a table of forms. An arrow points from the 'Form Title' column of the table to the text in the left column.</p> <table border="1"><thead><tr><th>Form Title</th><th>Employee</th><th>Step</th><th>Date Assigned</th><th>Step Due Date</th></tr></thead><tbody><tr><td>★ 2013 University Performance Evaluation for Cal Abbott</td><td>Cal Abbott</td><td>Employee Self Evaluation</td><td>11/11/2013</td><td></td></tr></tbody></table>	Form Title	Employee	Step	Date Assigned	Step Due Date	★ 2013 University Performance Evaluation for Cal Abbott	Cal Abbott	Employee Self Evaluation	11/11/2013	
Form Title	Employee	Step	Date Assigned	Step Due Date							
★ 2013 University Performance Evaluation for Cal Abbott	Cal Abbott	Employee Self Evaluation	11/11/2013								

UK Online PE System – Completing the Online PE for Employees

Completing the PE Process – Progress Line and Introduction

After accessing the PE form, at the top of the page, you can view the progress line. This gives you a quick update of which step the PE form is currently in.



There is also an introduction that explains the process from beginning to end.

Performance Evaluation Introduction

The employee may complete a self-evaluation and then forward to his or her manager. The manager will complete the evaluation and make it available for higher-level review. Once higher-level review is complete, the manager and employee will meet to discuss the evaluation. After the meeting additional comments or rating adjustments can be made. Once this is complete the employee and manager will sign the form.

Completing the PE Process - Step One: Employee Self Evaluation

The PE form in the UK Online PE System starts with an Employee Self Evaluation. If you choose not to complete a self evaluation, the PE form still needs to be sent to your manager so the PE process can advance. Per University policy, the self evaluation is optional unless your manager or department makes it mandatory.

Each Major Job Responsibility has its own section where you can self-rate and enter comments to support your rating.

Click on the Rating link to review what each rating level means.

Employee fields are open for input. This information will not be visible to the manager until the form is sent to the manager.

Job Standards and notes input on the Goal Plan will automatically feed into the PE form.

Major Job Responsibilities

In this section employee will self-rate and managers will rate the employee's performance of the MJRs. Updates to the job standards can be made in this section. MJR and Essential Function updates cannot be made here - those updates must be made in the Position Description System.

1.1

Goal: UK

Major Job Responsibility:
Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)

Essential Function: create action plan

Job Standard:
SOX compliance rate

Weight: 20.0% **Start:** 01/01/2013

Due: 12/31/2013 **Complete:** 00.0% **Status:** Complete

Rating by Mabeline Manager:
[Manager Rating](#): unrated

Rating by Cal Abbott:
[Rating](#): unrated

Mabeline Manager's Comments:
No comments

Subjects Comments:
spell check... legal scan...

UK Online PE System – Completing the Online PE for Employees

Completing the PE Process - Step One: Employee Self Evaluation, continued

Below the MJR sections, you will find the Core Competencies (University / Campus employees) or Behavioral Expectations (UK HealthCare employees). These can be rated on a 1 to 3 level and are not included in the overall PE score, unless you are UK HealthCare Leadership.

Core Competencies

Core competencies are skills, areas of knowledge, or abilities all employees need to be successful at the University of Kentucky. Click on the Writing Assistant link for examples of behaviors exemplifying the core competencies. The manager needs to provide supporting comments for the rating.

Section Summary

Dependability	unrated
Diversity and Inclusion	unrated
Initiative	unrated
Integrity	unrated
Interpersonal Relationships	unrated

Dependability
Demonstration of consistency in attendance and quality of work.

Rating by Mabeline Manager:
Rating: unrated

Rating by Cal Abbott:
Rating: unrated

Comments by Cal Abbott:

[writing assistant...](#) [spell check...](#) [legal scan...](#)

The Writing Assistant gives you examples of behaviors exemplifying the Core Competencies or Behavioral Expectations at each rating level.

The Legal Scan can be used to identify words or phrases that might be inappropriate and unnecessary. It does not prevent you from using the words or phrases.

Any professional development goals entered on the Professional Development Goal Plan will be included at the bottom of the PE form. There are no rating fields for these goals as they are not included in the overall PE score.

Professional Development/Other Goals

1.1 Remove Goal

Professional Development:
work harder!

Results/Notes:

Status: Complete **Start:** 01/01/2013 **Due:** 12/31/2013 **Complete:** 0.0%

Comments by Cal Abbott:

[spell check...](#) [legal scan...](#)

These records can be removed from the PE form.

	The PE form can be saved at any time by clicking on the Save button at the top of the screen.
	The PE form can also be saved and closed to allow for multiple work sessions. To do this, click on the Save and Close button at the bottom of the screen.
	The employee sends the PE form to their manager by clicking on the Send to Manager button which is at the top and bottom of the PE form. After the Legal Scan, there is a second, confirmation step that must be completed before the form is sent to the manager.

UK Online PE System – Completing the Online PE for Employees

Completing the PE Process - Step Two: Manager Review

After you send the PE form to your manager, it is now time for the manager to input their ratings and comments related to your performance. The information entered by the manager in this step is not viewable by you at this time.

Completing the PE Process - Step Three: 1:1 Meeting

The PE form is parked at the 1:1 Meeting step until the face-to-face meeting between you and the manager has occurred. While the form is in this step:

- Upper-level management can review PE forms for employees in their direct reporting line
- Employees cannot view any rating or comments entered by their manager
- Managers can make edits to their fields on the PE form based on information gained during the face-to-face meeting with the employee

Completing the PE Process - Step Four: Employee Signature

In this step, you can view the completed PE form, seeing the manager's ratings and comments, methods of evaluation, and the overall PE rating. These fields are now locked and no changes can be made.

1.1			
Goal: UK			
Major Job Responsibility:			
Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)	Essential Function: create action plan		
	Job Standard: SOX compliance rate		
Weight: 20.0%	Start: 01/01/2013	Due: 12/31/2013	Complete: 100.0% Status: Complete
Rating by Mabeline Manager:		Rating by Cal Abbott:	
Manager Rating: 2.0 - Meets Expectations		Rating: 2.0 - Meets Expectations	
Mabeline Manager's Comments:		Subjects Comments:	
Explain rating. Provide examples of employee's performance to support your rating.		Can include additional comments to support self-rating.	

UK Online PE System – Completing the Online PE for Employees

Completing the PE Process - Step Four: Employee Signature – continued

Methods of Evaluation

Please select from the following Methods of Evaluation that will be used in evaluating the employee's performance. Additional methods of evaluation and/or additional explanations of those methods may be added if necessary.

- Supervisory Observation - Supervisor evaluates the employee's performance by direct observation of work
- Third Party Feedback - Supervisor evaluates the employee's performance by in part based on relevant feedback from outside customers, vendors, or others
- Peer Feedback - Supervisor evaluates the employee's performance in part based on relevant feedback from the employee's peers
- Spot Checks - Supervisor evaluates the employee's performance in part based on random spot checks of work
- Sampling Statistics - Supervisor evaluates the employee's performance in part based on sample's of the employee's work or statistical data that indicates the employee's level of work of demonstrated competence
- Project Results - Supervisor evaluates the employee's performance in part based on actual results of projects or assignments the employee has managed or participated in
- Self Report - Supervisor evaluates the employee's performance in part based on the employee's own evaluation of his/her work

Other

Summary

Ratings for each MJR and Core Competency are listed here. The overall rating is calculated from the MJR scores. The Core Competency ratings are not calculated into the overall rating. Professional Development goal results are also included but not rated. Overall comments on the employee's performance can be entered in this section.

Calculated Form Overall Rating 2.4 / 4.0

Major Job Responsibilities	Rating
Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)	2.4 / 4.0
	2.0 - Meets Expectations

Overall Comments
Comments by Mabeline Manager:
Add summary of employee's performance.

Signature
The electronic signature belows represent your acknowledgement of this form.

Employee: _____
Cal Abbott

Manager: _____
Mabeline Manager

Section Comments:
Comments by Cal Abbott:

[spell check...](#) [legal scan...](#)

You can read any comments or performance summary that was entered by your manager.

Your signature acknowledges the one-to-one conversation has taken place and the PE form has been reviewed. Your signature does not necessarily mean you agree with the content of the PE form.

You now have the opportunity to add final comments of your own.

Click on the Sign button to electronically sign the PE form and send it to your manager.

UK Online PE System – Completing the Online PE for Employees

Completing the PE Process - Step Five: Manager Signature

After you sign your PE form and send it to your manager, they will have the opportunity to add any final comments they have. They will then sign the PE form to complete the process.

Viewing Your Completed PE Form

To view your completed PE form, go to your **Performance** page, click on the **Completed** section,

- Click on the link in the **Form Title** column to view your completed PE form

My Forms

All Forms	Items per page: 10	Showing 1–7 of 7		
In Progress	Create New Folder	Move to Folder: Select Folder Move		
Completed	Display Options			
Create New Folder	<input checked="" type="checkbox"/> Form Title <input checked="" type="checkbox"/> Employee <input checked="" type="checkbox"/> Form Start Date <input checked="" type="checkbox"/> Form End Date <input checked="" type="checkbox"/> Form Due Date <input checked="" type="checkbox"/> Completed On			
Un-Filed				
Form Status				
	Form Title	Employee	Form Start Date	Form End Date
	★ 2013 University Performance Evaluation for Cal Abbott	Cal Abbott	01/01/2013	12/31/2013

