

CALS PERFORMANCE EVALUATION CHECKLIST

Performance Evaluation Checklist - **FOR SUPERVISORS** - Completing the ONLINE EVALUATION

STEP 1

- All employees are given the opportunity to complete a self-evaluation within a reasonable deadline. Employees may find guidance for accomplishing this in the separate document, "Performance Evaluation Checklist for EMPLOYEES".
 - Then, supervisors may start evaluating by going to [Hokie Spa](#), selecting Hokie Team, and then "Performance Planning and Evaluation Tool". On the Performance Main Menu, select "Performance Evaluation Menu". Select "List employees where I am defined as the supervisor". Review the evaluation status of each staff employee. Depending on where you are in the process, follow one of these four steps:
 - If the evaluation status is: "No Evaluation Exists" or "Employee Editing Self-Evaluation", it is time to follow up with the employee to see if s/he plans to complete or finish the self-evaluation. Do not proceed past this point unless you have verification from the employee that s/he will not complete a self-evaluation. Go back. If you proceed by clicking the button "Create/Edit Evaluation", you will encounter a "STOP" sign. Click "Cancel" to go back.
 - If the evaluation status is: "Employee Self-Evaluation Complete", you are ready to begin your evaluation and should skip ahead to Step 2 of this checklist.
 - If the evaluation status is: "Supervisor Editing", you may select "View Evaluation" to continue editing where you left off, and skip ahead to Step 3 of this checklist.
 - If the evaluation status is: "Evaluation sent to Reviewer", you cannot proceed until the Reviewer approves the evaluation in the system. When the reviewer approves, the status will be "Senior Management Approved", in which case, skip ahead to Step 4 of this checklist.
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STEP 2

- To create an evaluation, select "View Evaluation". On the next screen, decide if you want to include or exclude your employee's self-evaluation comments in your evaluation.
 - To keep employee's comments and add your own, select "Update Employee Evaluation".
 - To keep the employee's comments, but hide them to show only yours, select, "Create Evaluation".
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STEP 3

- Proceed through each of the screens, rating the employee in the three major sections of the evaluation: Goals/Metrics, then Competencies, then the Career Development Plan & Supervisor Comments Section. Include thoughtful comments. It is important to save your work routinely or the system will time-out and you will lose your work.
 - After entering evaluation ratings and comments, save it. If complete, send the evaluation to the reviewer by selecting "View Entire Evaluation", scroll to the bottom and select "Finalize and send to Reviewer". Supervisor will not take further action until s/he receives a system-generated notification to do so.
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STEP 4

- The supervisor will receive notification when the evaluation has been approved by the Reviewer and Budget Authority. The supervisor will schedule time with the employee to discuss the evaluation. Supervisor may print a copy of the evaluation to review with the employee, or may elect to review it together online. This meeting is a great opportunity to begin discussing goals for the coming plan year. At this meeting, the supervisor should select on the screen, "Finalize and send to Employee for approval".
- The performance evaluation is considered "received" by Central HR when the employee logs into HokieSpa and selects "View Current Approved Evaluation", makes comments if s/he elects to do so, and then selects "I Have Received and Reviewed the Evaluation".
- The evaluation status will then be "Employee Approved". The evaluation process is complete.
- ***By state policy, next year's plans are due within 30 days of the employee receiving his/her evaluation.

For questions about Performance Management, Planning & Evaluation, please contact:
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