

CALS PERFORMANCE EVALUATION CHECKLIST

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

EMPLOYEE SELF-EVALUATION

All employees are given the opportunity to complete a self-evaluation within a reasonable deadline. Employees may complete a self-evaluation in the online Performance Management Tool, or they may utilize the CALS Self Evaluation Form on the CALS website at: www.cals.vt.edu/faculty-staff/files/staff-self-assessment.doc

To utilize the self-evaluation in the performance management tool:

- ☐ The employee should start by logging into [Hokie Spa](#).
- ☐ Select the Hokie Team tab, and then "Performance Planning and Evaluation Tool".
- ☐ On the Performance Main Menu, select "Performance Evaluation Menu".
- ☐ Select "Create/Edit Self Evaluation".
- ☐ Review each goal, select a rating for each goal, and add comments. (Remember to save often)
- ☐ Move from one goal to the next by selecting "Continue to Next Goal".
- ☐ After all goal ratings/comments are complete, select "Continue to Competencies".
- ☐ Evaluate individual and universal competencies.
- ☐ Select "Continue to Overall Rating and Comments".
- ☐ Select an overall rating and add overall comments, and then select "Save".
- ☐ Select "View Entire Evaluation".
- ☐ Select "Send to Supervisor".
- ☐ The self-evaluation through the performance management tool is complete.

REVIEW AND APPROVE FINAL EVALUATION

The supervisor will send the evaluation to the employee electronically. The evaluation is not received by Southgate Human Resources until the employee logs in and approves the evaluation. To review and approve an evaluation:

- ☐ The employee should start by logging into [Hokie Spa](#).
- ☐ Select the Hokie Team tab, and then "Performance Planning and Evaluation Tool".
- ☐ On the Performance Main Menu, select "Performance Evaluation Menu".
- ☐ Select "View Current Approved Evaluation".
- ☐ Scroll to the bottom of the plan and select "**I have received and reviewed my performance evaluation**".
- ☐ The evaluation process is complete.

Employees who do not access the online performance management tool will be assisted by the supervisor in getting these items completed.

For questions about Performance Management, Planning & Evaluation, please contact:
April L. Wood, CALS Human Resources Manager (540) 231-3003 or AprilWood@vt.edu