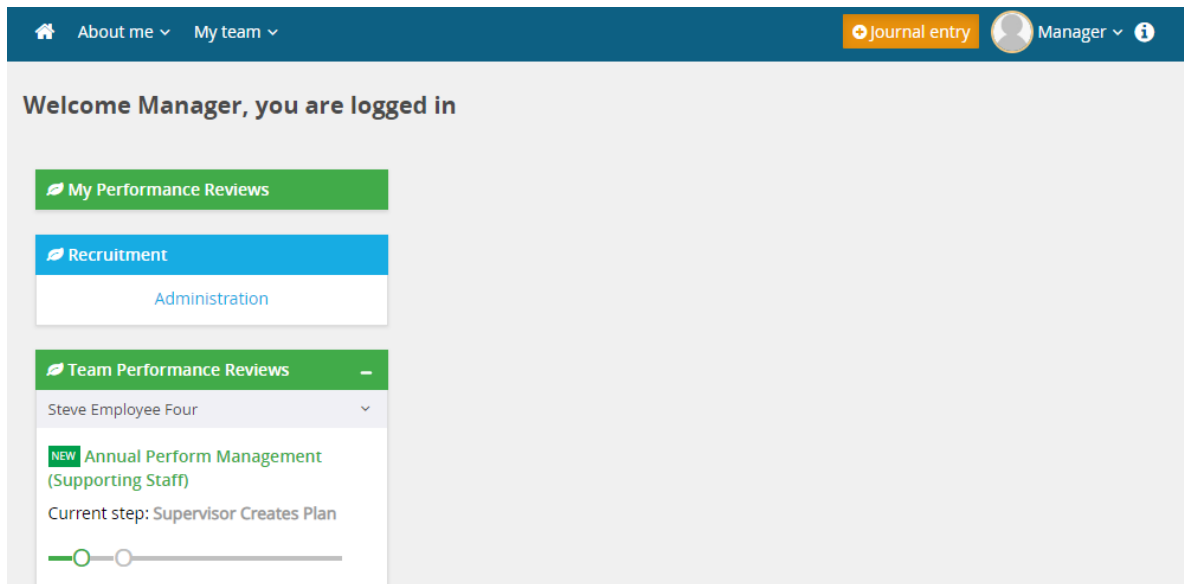


# Performance Management Process

## Annual Performance Management Process Procedures (For Supervisor)

- I. **Supervisor Notification** – An email will be sent to each supervisor at the beginning of each **Annual Performance Evaluation Cycle**. By clicking on the link provided on the email, which will look like this: *Click the following link to access the system* [Click here](#). The supervisor will enter the process at its current stage. *Please contact your Human Resources Business Partner if you have any questions or need some additional assistance. Human Resources can also be contacted directly at (859) 622-5094.*
- II. After clicking on the link, you will find yourself on the main page for the Performance Management System. Under the section titled **Team Performance Reviews**, select the **Annual Performance Management process** at the stage of **“Supervisor Create Plan”** for the given employee.



- a. Once you have clicked on the process, you will find yourself inside the annual evaluation form. On the **Start** page, you will find some introductory information concerning the annual process that should help you progress through the system. You will also notice the sections across the top. You can navigate through each section by clicking on the tabs or you can click the **Next** button in the lower right-hand corner of each page.

## Steve Employee Four - Annual Perform Management (Supporting Staff)

Start > Strategic Priorities > Guiding Values > **Goals & Objectives** > Next steps

Actions ▾

Welcome to the **next stage** of EKU's performance management process!

At this time your employee should have completed their **Employee Awareness Profile** assessment and together you and your employee should have reviewed this assessment, focusing on the University's Strategic Priorities and Guiding Values as well as how your employee plays a critical role in strengthening these priorities and values **in pursuit of excellence** for themselves and for the University.

The next phase of the performance management process is **establishing goals** with your employee for the coming evaluation period (the current academic year). Critical to managing your employee's performance and fostering their excellence is setting thorough goals and objectives. If you're ready to begin building goals, **click on the "Goals & Objectives" tab above**. You're encouraged to **review the University's Strategic Priorities and Guiding Values** beforehand (simply click on those tabs as needed). Remember, as you're building your goals **save your work** so you don't lose your progress.

If you have any questions or need any assistance, please contact your Human Resources Business Partner.

Good Luck planning!

Next →

- b. As you move through the tabs, you will be able to review what areas the employee will be reviewed on during the annual process; however, for this initial step of **establishing goals**, you will only need to complete the **"Goals & Objectives"** tab. You can either click on that tab directly or hit the **Next** button.

## Steve Employee Four - Annual Perform Management (Supporting Staff)

Start > Strategic Priorities > Guiding Values > **Goals & Objectives** > Next steps

✓ Saved

Actions ▾

In this section the supervisor and employee **establish goals** for the employee to pursue during the evaluation period (the current academic year). These goals are determined by discussion between the employee and supervisor. The supervisor will enter the agreed-upon goals below. At the conclusion of the evaluation period, the supervisor will rate their employee's efforts toward achieving these goals as well as the employee's efforts toward satisfying the University's Strategic Priorities and Guiding Values. Once the supervisor has established goals for the employee, the goals will be forwarded to the employee for their acknowledgment.

**To enter a goal, the supervisor must click "Add goal" below.**

Items to remember when setting goals for employees:

- Goals should encourage employee **EXCELLENCE**.
- Goals should be SMART, meaning **Specific, Measurable, Attainable, Realistic**, and **Time-Oriented**.
- Goals should include the **DUE DATE** or **TIMELINE** within the goal description so the employee will know when completion is expected.
- Employee should participate in drafting the goals.
- There should not be too many goals or too few (a suggested number is three-to-five SMART goals).
- Goals should encourage the employee to stretch, not to just satisfy general job expectations.

- c. Once on the **"Goals & Objectives"** tab, you will find some instructional text to assist you with building the employee's goals for the upcoming evaluation period. At this time, you have the ability to add goals by clicking on the **Add Goals** button. Enter the title of the goal and a description of the expectations for this goal. Continue to add goals as needed. As you complete each goal remember to hit the **Save** button.

Actions ▼

[+ Add Goals](#)

Don't forget to Save!

- d. Once you have completed setting up all the goals for this employee hit the **Next** button and move onto the **Next steps** tab. Here you will see a summary page and you can review the goals you have created by clicking on the **Goals & Objectives** summary section. If you are ready to move the process on to the next step **“Supervisor meets with Employee to discuss plan”** you can click on the **Go to next step** button.

**Steve Employee Four - Annual Perform Management (Supporting Staff)**

Start > Strategic Priorities > Guiding Values > Goals & Objectives > **Next steps**

Last saved: 23 Aug 2022, 2:39pm Actions ▾

Overall rating

★★★★★  
Not rated

**Summary** ↑↓

Summary

▶ Strategic Priorities

▶ Guiding Values

▼ Goals & Objectives

1. Goal One

Your next step: Supervisor meets with Employee to discuss plan

—○—

ⓘ Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

**Go to next step**

[View entire process](#)

- e. At this point, you will schedule a goal-setting meeting with your employee. You should walk through the process inside the system, discussing each section, providing the expectations for the upcoming year, and answering any questions the employee may share with you. Finally, go over the **goals and objectives** with your employee and make any edits that may come up during the discussion. When you have completed your discussions, you can hit the **Go to next step** button and move it to the **Employee Acknowledges the Plan step**.

**Steve Employee Four - Annual Perform Management (Supporting Staff)**

Start > Strategic Priorities > Guiding Values > Goals & Objectives > **Next steps**

Last saved: 24 Aug 2022, 8:04am Actions ▾

Overall rating

★★★★★  
Not rated

**Summary** ↑↓

Summary

▼ Strategic Priorities

1. Knowledge  
2. Innovation  
3. Transformation

▶ Guiding Values

Your next step: Employee Acknowledges Plan

—○—

ⓘ Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

**Go to next step**

[View entire process](#)

- III. **Annual Performance Management Process Timeline** - Congratulations on completing the initial stages of the process and for sharing the plan with your employee. Moving forward, you will continue to get notification emails when a new stage is ready for you to complete, and you will simply click on the link provided to be brought back into the system. You will continue to navigate through the process and take

the appropriate actions as described in the instructional text at each stage of the process. Below you will see the upcoming timeline for the Annual Performance Management process.