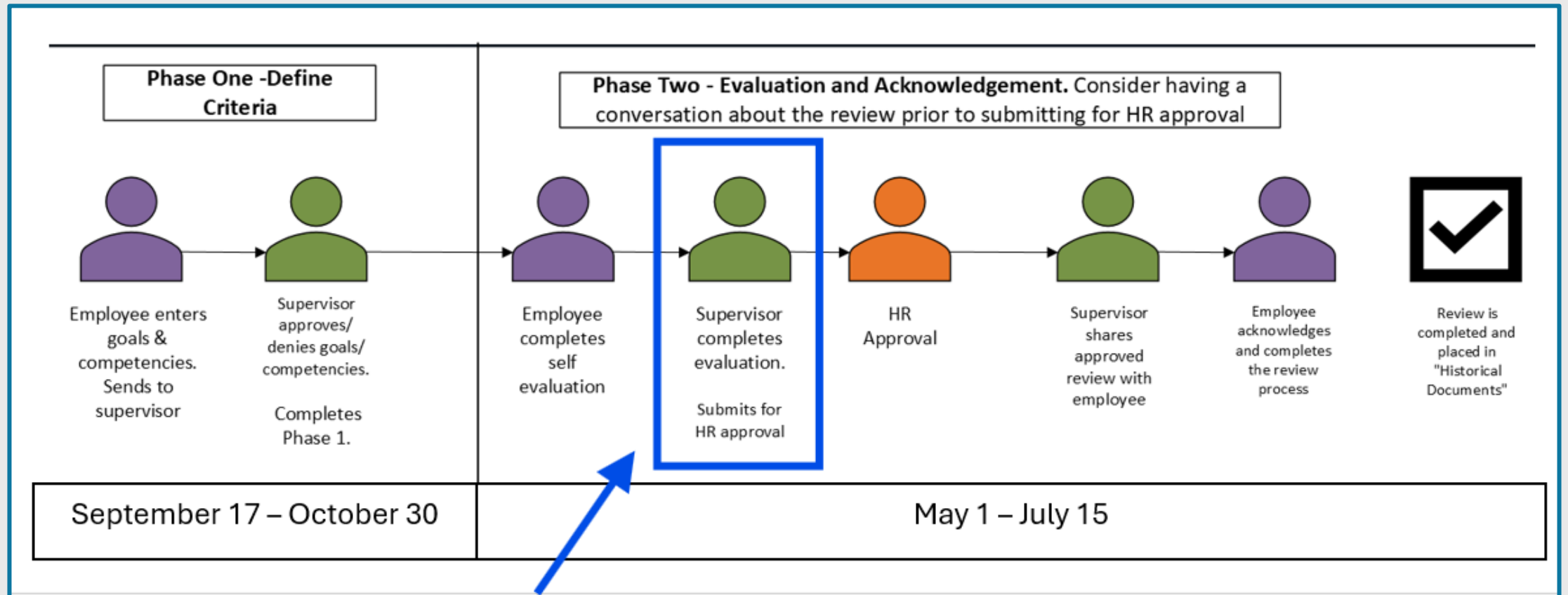


Performance Management Process

Supervisor Process Overview Phase 2



We are here in the process!

At this time, the employee has submitted their self evaluation

Step 1:

Navigate to the employee's performance document from the Team Performance tile in your Manager Self Service Dashboard.

You'll see that the document status is now "Evaluation in Progress"

Current Documents

						9 row
						↑↓
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date		
 Administrator	Performance Document	Evaluation in Progress	09/01/2026 09/30/2026	09/30/2026		>

Overall Summary

1. Complete your evaluation and rating.
2. Consider discussing the evaluation with your employee prior to submitting it to HR. Otherwise, discuss your evaluation after HR has approved the form and you have shared it with your employee.

Employee



★★★★☆ Meets Expectations

Reflecting on my two goals from this year....

Overall...

My accomplishments for the year include....

Manager



☆☆☆☆☆ Your rating is mandatory.

Rich text editor with toolbar (undo, redo, bold, italic, underline, link, unlink, list, table) and a text area with placeholder "Type comment here..."

① Comments are required.

cannot see your evaluation

[↑ Back to Top](#)

Step 2:

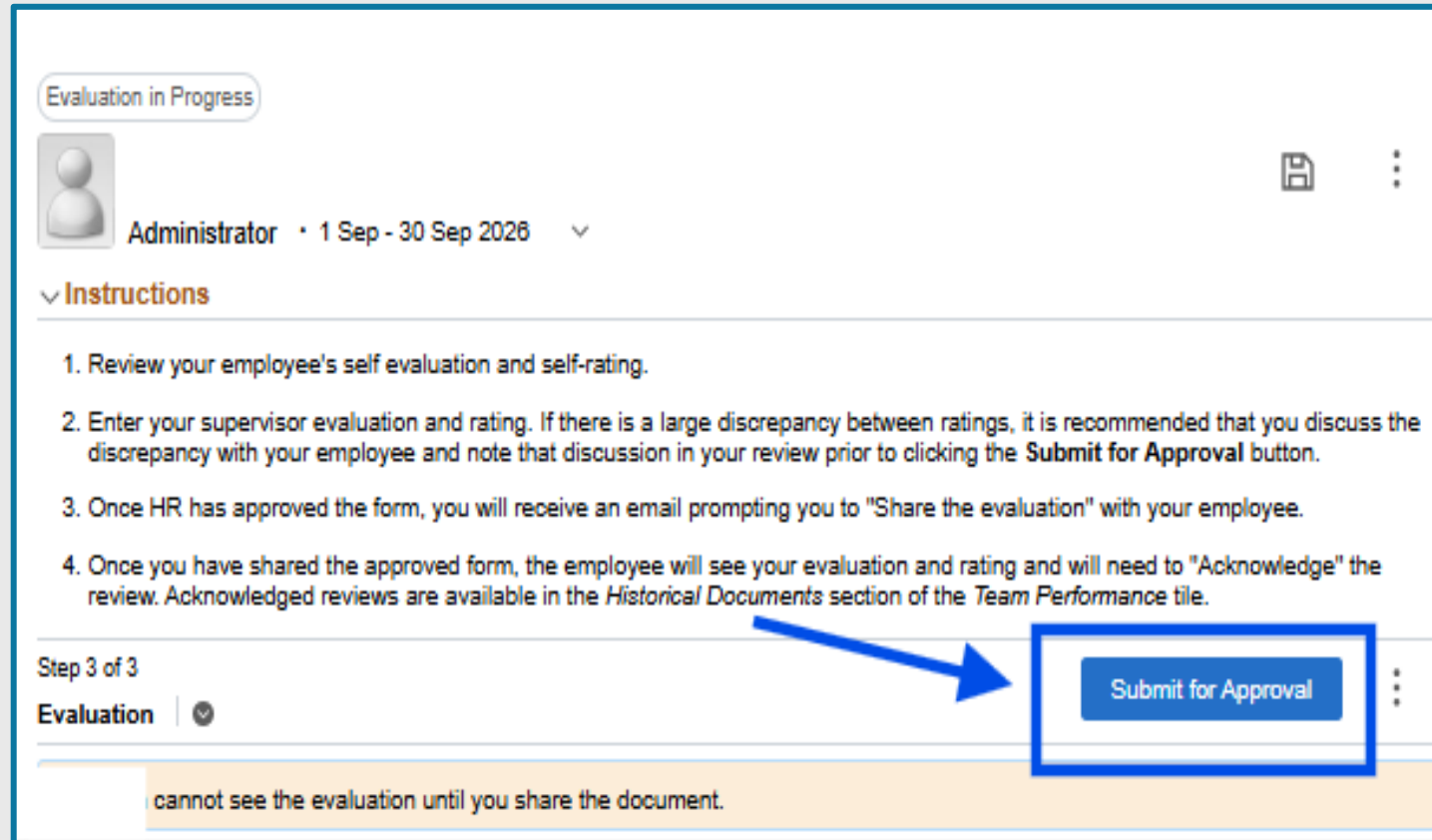
Scroll down and read/review the employee's self evaluation.

Then add your own rating and evaluation.
The rating system is:

- 1 – Does Not Meet Expectations
- 2 – Partially Meets Expectations
- 3 – Meets Expectations
- 4 – Exceeds Expectations
- 5 – Far Exceeds Expectations

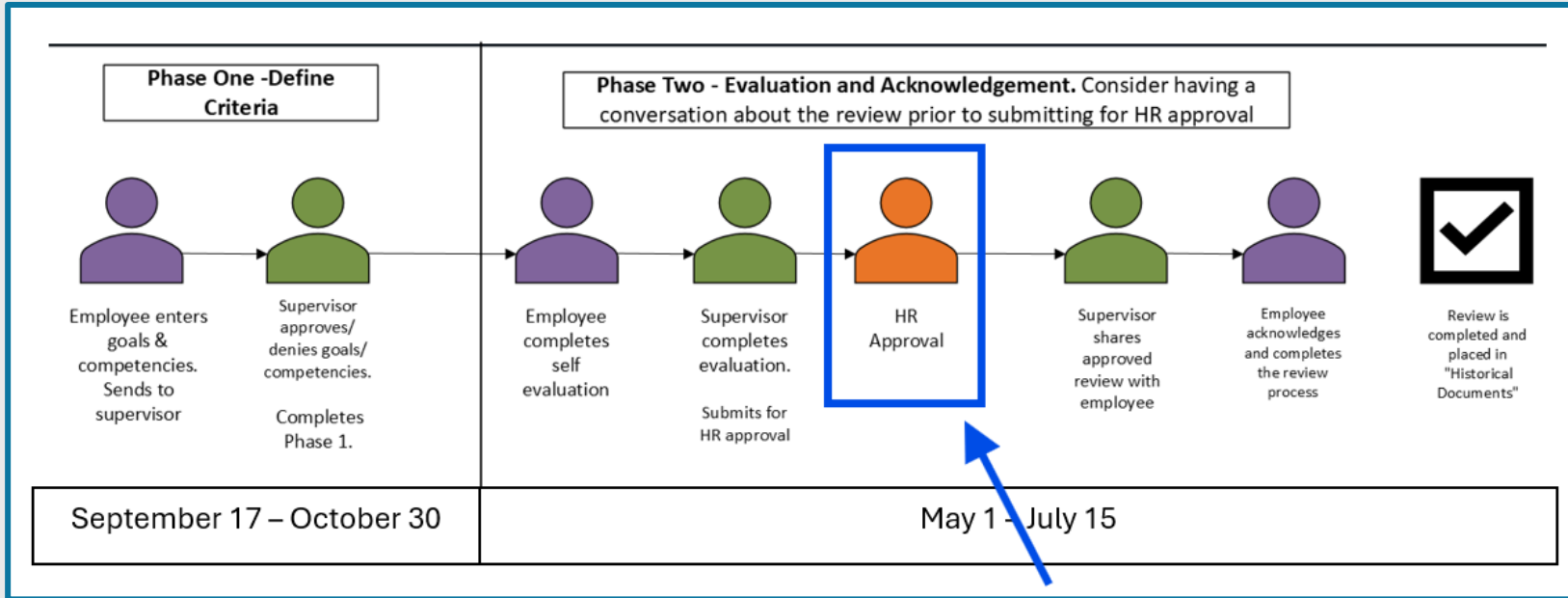
It is encouraged that you speak with your employee about this rating/evaluation. Employees should not be surprised by what their supervisor writes.

Step 3: Once you have added your evaluation and rating, you are ready to submit the document for approval, using the Submit for Approval button.



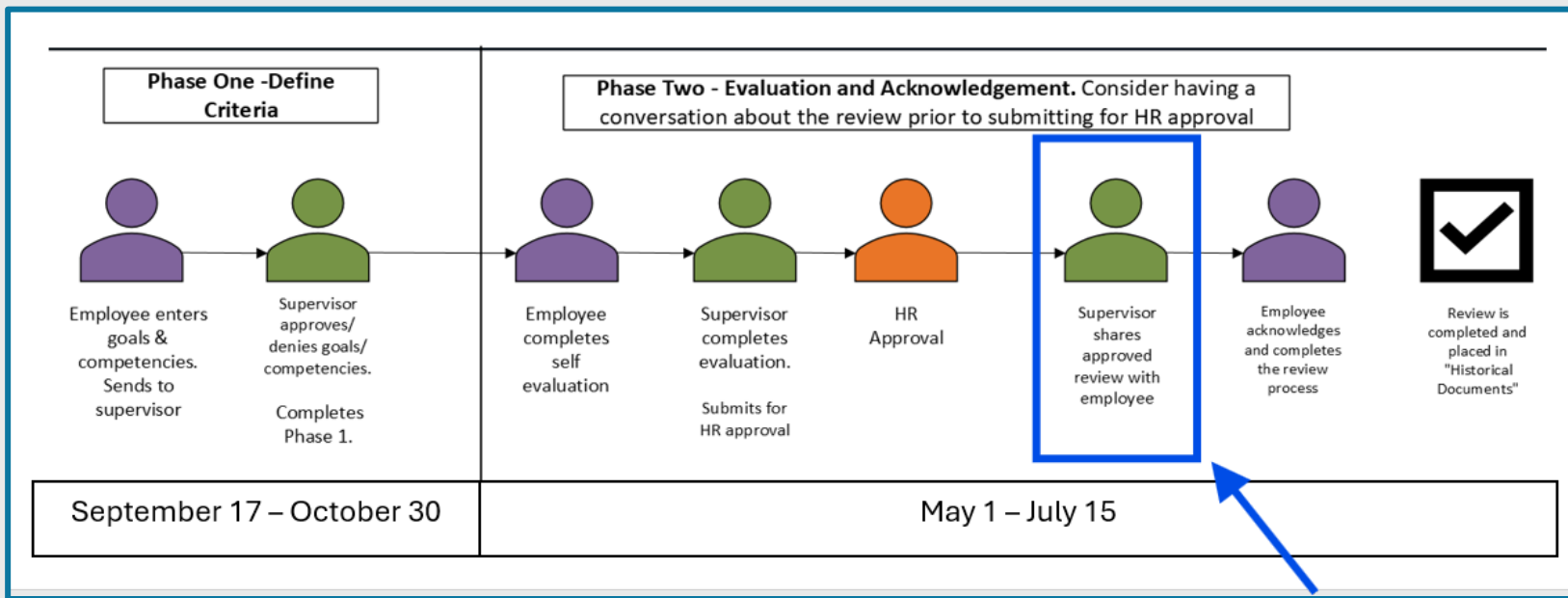
The screenshot displays a web interface for an evaluation process. At the top, a status bar indicates 'Evaluation in Progress' and shows the user as 'Administrator' for the period '1 Sep - 30 Sep 2026'. Below this, a section titled 'Instructions' lists four steps: 1. Review the employee's self-evaluation and self-rating. 2. Enter the supervisor evaluation and rating, with a note to discuss discrepancies. 3. Receive an email to 'Share the evaluation' after HR approval. 4. Employee acknowledgment and availability in the 'Historical Documents' section. At the bottom of the form, a blue button labeled 'Submit for Approval' is highlighted with a blue rectangular box, and a blue arrow points to it from the instructions section. The footer of the form shows 'Step 3 of 3' and 'Evaluation' with a checkmark icon. A yellow banner at the very bottom states, 'cannot see the evaluation until you share the document.'

HR will review the document and approve it, which will send you an email. If there is a large mismatch between the employee's rating and yours, HR may contact you for clarification.



We are here in the process!

You will receive an email once the performance document is approved (top photo).



This email will instruct you to return to the document to share it with the employee (bottom photo).

Step 4: Once HR has approved, you will see the document status for the employee change to “Approval – Approved” (Top Photo).

Please click into the document and click the “Share with Employee” button. They cannot see the performance document unless you do this! (Bottom Photo).

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 Administrator	Performance Document	Approval - Approved	09/01/2026 09/30/2026	09/30/2026

Approval

Overall Rating: Meets Expectations

 Administrator • 1 Sep - 30 Sep 2026

Instructions

Once HR has approved, you will receive an email and the "Share with Employee" button will appear below. Once available, please click the "Share with Employee" button to share this final copy with employee.

Step 3 of 3

Evaluation

Share with Employee

cannot see the evaluation until you share the document.

The employee then “Acknowledges” the document and the document is complete.

All completed document are viewable in the “Historical Documents” tab.

If the employee cannot acknowledge the document, you can use the “Override Acknowledgement” button. Please contact HR before you use this button.

The performance process is now completed for the review period.