



Performance Evaluation On-line Program

There are three different ways you can get to the on-line evaluation program

1. By clicking on the link in the email notification you were sent.
2. By going to eval.orem.org
3. Through the city's application tool bar. The evaluation program is in the Human Resources section.

Internal Evaluation System

User Name Required!

Password

Save Password

You can use your timecard password or your computers initial sign on password

Windows Server
Active Directory

Note: You can only be logged into one city web based program at a time.

Evaluation Program Main Screen Headings

The screenshot shows the top navigation bar of the City of Orem Online Services. It includes the City of Orem logo and the text 'CITY OF OREM Online Services'. Below this, there are several menu items: 'DEPARTMENTS?', 'ESERVICES', 'GOVERNMENT', 'BUSINESS', 'POLICE & FIRE', 'PARKS & REC', and 'LIBRARY'. A secondary navigation bar contains 'Evaluations', 'Approvals', 'History', 'Summary', 'Personal Notes', and 'Logout'. The 'Evaluations', 'Approvals', 'History', 'Summary', and 'Personal Notes' items are circled in red.

Note: As you move from section to section do not use the back arrow on your web browser. Click on the gray headings instead.

This main evaluation screen shows you all the evaluations that you are needing to complete.

All evaluations waiting for your approval will show in this section.

List of all evaluations done on your employees. Can search by completed or in progress.

Summary of Needs Improvement (NI), Meets Expectations (M) and Exceeds Expectations (E) per division.

This section allows you, through out the year, to add notes to refer back to at a later date. For example if one of your employees obtains a certification or does well on a project. You can add that information now and refer back to it when preparing their annual evaluation.

Date	Type	First Name	Last Name	Job Title	Status	Progress	Option	Prt.	Comment
05/31/2017	Annual	John	Doe	Senior Programmer/Analyst	Not Yet	0/0	Forward		

Evaluation Program Main Screen

Employee Evaluation Information

 **CITY OF OREM** *Online Services*

DEPARTMENTS? ESERVICES GOVERNMENT BUSINESS POLICE & FIRE PARKS & REC LIBRARY

Evaluations Approvals History Summary Personal Notes Logout

Evaluations in Progress

First Name	First Name	Last Name	Last Name		Reset	Search				
	Imp. Date	Type	First Name	Last Name	Job Title	Status	Progress	Option	Prt.	Comment
	05/31/2017	Annual	John	Doe	Senior Programmer/Analyst	Not Yet	0/0	Forward		

Due Date

Click the select button to bring up the employees evaluation

Not Yet = Evaluation is not complete. Completed = Evaluation is complete and can be sent to HR.

If you forward an evaluation to another supervisor you are saying that that supervisor is the one who is responsible to complete the evaluation not you. This is not how you send an evaluation to your supervisor for approval. If you use this feature a new approval path will be created.

Any supervisor in the approval path can add comments that can be seen by all supervisors in the approval path.

Completing the Evaluation Sections 1 and 2

 **CITY OF OREM** *Online Services*

DEPARTMENTS? ESERVICES GOVERNMENT BUSINESS POLICE & FIRE PARKS & REC LIBRARY

Evaluations Approvals History Summary Personal Notes Logout

Employee Performance Appraisal (Editing Version)

	1.	How is my input saved? As to any fields, your input will be saved as soon as your mouse cursor moves out of that field or it will auto-save it within every 5 minutes.
	2.	Why won't it save my checkbox changes? If you click more than one checkbox in a row, it will not let you save any changes on that row. You can only have one box checked in each row.
	3.	How do I know if Section 4 or Section 6 is completed? Click on the drop-down box and check each item. If there is a check mark at the front, it means that item in that section is complete. If all items are checked off, that means that section is done.
	4.	Is the evaluation ok without any goals? Yes, in section 6, the goals are optional.

1. Employee Information Time left before autosaving: 4:59

Employees information and evaluation details.

Name	John Doe	Due Date	05/31/2017
Department	City Manager's Office	Position	Police Officer
Division	Information Technology	Review Type	Annual
Years in Service	20.17	Evaluator	Amy Peterson

2. Position Summary

Brief summary of the employee's position.

This is a technical position working under the direction of the Information Technologies Division Manager. The Senior Programmer/Analyst is responsible for the analysis and design of new computer systems and the technical work in the development and codification of computer programs.

After 5 minutes of inactivity the program will save your progress. After 20 minutes of inactivity the server will log you out of the program.

Completing the Evaluation Sections 3 and 4

3. Skills, Abilities and Essential Functions

See job description.

Summarize the employee's overall ability to perform the essential functions of the position (competency) based on job knowledge, skills and related experience:

Prior Data: John is a fantastic employee.

4. Performance Factors and Performance Rating Levels

Employee Performance Factors provide a road map so employees understand the knowledge, skills, and abilities necessary for appropriate performance. These factors are meant to communicate the values and vision of the organization.

Within each factor are 3 or 4 sub-factors on which the employee's performance will be evaluated. At the end of the performance appraisal period, the supervisor will consider the employee's performance and select the rating level in each area that best describes how well the employee accomplished or did not accomplish that factor.

Performance Rating Levels:

(E) EXCEEDS EXPECTATIONS: Frequently exceeds job requirements.
Objectives are achieved above the established standards and accomplishments are made in unexpected areas as well. This rating should only be used when work performance truly exceeds expectations.

(M) MEETS EXPECTATIONS: Performs 100% of job duties satisfactorily. Normal guidance is required. This is the rating of a competent employee

(NI) NEEDS IMPROVEMENT: Occasionally fails to meet job requirements; performance must improve to meet expectations of position. Some work may be incomplete, of poor quality or quantity, or not submitted within acceptable time frames. Improvement is required.

When evaluating each of the following performance factors, consider only those aspects of the employee's performance in the specific area being evaluated. Upon the completion of rating each sub-factor, the supervisor will use the "Comments/Justifications" box to record remarks, specific examples, or explanations to support any rating other than "M." This justification will enable the supervisor to explain the rating with specific performance examples. Additionally, it will enable the employee to understand why the performance factor was rated as it was.

Department Directors approve additional sub-factors other than those shown below and as recommended by the manager/supervisor, before including them on this appraisal form.

The system will display for your convenience the information from the previous evaluation. Delete the words "prior data" before starting this evaluations comments.

Instructions for section 4. This section requires you to evaluate the employee in 9 different categories.

Note: Make sure you have a good understanding of the rating levels before proceeding.

Completing the Evaluation Section 4 continued

This drop down box displays the 9 categories. Each category will have 2-4 skill criteria that you will rate as either NI, M or E and a comment section that will also need to be completed.

Redo this Entry Add Skill Criteria Entry

This button will uncheck every box and delete the comment box.

See what the co-worker(s) say about this employer regarding to this aspect ?

This comment will pop up if the employee has been given peer to peer reward points by a co-worker. To see the details of the peer to peer reward click on the speech bubble. You can copy and paste the information into the evaluation if you would like.



When the comment box is active it will spell check your comment. Once you click out of the comment box the spell check feature will no longer be active.

Once you have completed a category the system will put a check mark before the name of the category in the drop down box.

* ✓ : Section is complete

	NI	M	E	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Completing the Evaluation Section 4 continued

Job Knowledge/Technical Skills/Quantity of Work

Redo this Entry Add Skill Criteria Entry

		NI	M	E	
a	Understands and performs assigned duties and job requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
b	Uses techniques, materials, tools, and equipment effectively; follows procedures and uses safe practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
c	Stays current with technology, job-related skills and applicable certifications and appropriately applies job knowledge/technical skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
d	Amount of work performed on a daily basis is appropriate for specific job responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Comments:

* √ : Section is complete

You have the option to add up to 4 skill criteria to the "other" category.

Each category will have 2 to 4 skill criteria.

You can add one skill criteria to each category if you have something specific to the job you would like to evaluate them on.

Other

Redo this Entry Add Skill Criteria Entry

		NI	M	E	
a	This is other item 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
b	This is other item 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete

See what the co-worker(s) say about this employer regarding to this aspect ?

Comments:

Completing the Evaluation Section 5 and 6

5. Overall Performance Summary

Comments:

Your comment in this section is limited to 10,000 characters.

6. Employee Work Plan (Goals)

The supervisor and employee will set goals for the coming year. Opportunities for training and development should encourage appropriate performance and the Employee Work Plan should provide a vehicle for setting and communicating performance goals. The supervisor and employee will focus on goals to improve job performance according to departmental and organizational objectives. Because development is most effective when it is concentrated on a limited number of goals, the Employee Work Plan should focus on one or two main performance goals. Other short-term goals should be discussed, set, and met throughout the year.

Additionally, after the supervisor and employee have identified the main performance goals, an action plan to help the employee reach those goals will be established. After the action plan has been completed, supervisors should work with the employee to set reasonable deadlines for completing the goals during the next appraisal period and frequently follow up on their progress.

A reference to SMART goals: Process of the evaluations-> **S**pecific-**M**easurable-**A**ttainable-**R**elevant-**T**imely.

Goal --- (Establishes Who and What must align with Dept, Div or Section Goals)

Add a New Goal

Click this button to add a goal for the coming year. Add 3 goals at the most.

Goal --- (Establishes Who and What must align with Dept, Div or Section Goals)

Example goal Add a New Goal

Goal Description

Example goal

Measurement --- (Establishes Why and When)

Action Plan --- (How)

Delete this Goal

After you have added the new goal you will need to enter the goal description, measurement and action plan. You will do this for every goal added

Completing the Evaluation Section 7

7. Review Performance Goals Established Previously for the Current Appraisal Period

Statement should include goals, accomplishments and obstacles that may have prevented goals from being met:

Prior Evaluation Goal(s) on [12/6/2015]

Action	Seq.	Goal	Measurement	Action Plan
Import	1	Visual Studio Transition	The IT long term goals are to move the programming environment to Visual Studio. This will enhance the strategic viability of Orem's IT model. Robert should begin the transition process and by the end of the year be competent in Visual Studio programming.	Complete Training and feel confident in your understanding of the fundamentals of Visual Studio by 3/31/2016. Write one web based application by 6/30/2016. Write one client server based application by 12/31/2016.
Import	2	Complete the Online Version of Catacomber	The online version of Catacomber will be used by Draper City. Robert, for the City of Orem, will complete the project by the end of April, 2016.	Using Visual Studio and consulting with Draper, this project will be completed on time.

Last year's goals

If the goal from the previous year was not met click the "import" button and it will move the goal up to the current year's goals so it can continue to be worked on.

Review last year's goals and write a comment detailing the goal accomplishments or if the goal was not met.

Completing the Evaluation Section 8 and 9

8. Employee Comments and Acknowledgement

Comments:

If the employee would like to add a comment to the evaluation allow them to add their comment here

Return to Main Save and Proceed

Once you have completed all 9 sections of the evaluation click the "Save and Proceed" button.

9. Supporting Documents (if Necessary)

You can upload any supporting document(s) if necessary. The documents you uploaded will be printed together with the evaluation and kept in the employee's personal file at HR. The accepted files types are MS word, MS Excel, WordPerfect, RTF, PDF, Jpg, Jpeg and Gif.

Browse...

Upload

List of Uploaded File(s)

You can click the delete button to delete a selected file. However, once the evaluation is submitted, you cannot delete any of the files you uploaded.

The image shows a screenshot of a web-based evaluation form. The top section is titled "8. Employee Comments and Acknowledgement" and contains a text area for comments. A red callout box points to this area with the text: "If the employee would like to add a comment to the evaluation allow them to add their comment here". Below the text area are two buttons: "Return to Main" and "Save and Proceed". A red callout box points to the "Save and Proceed" button with the text: "Once you have completed all 9 sections of the evaluation click the 'Save and Proceed' button." The bottom section is titled "9. Supporting Documents (if Necessary)" and contains a text area for uploading documents. A red callout box points to this area with the text: "If would like to add a document, certificate, picture, etc. click the 'upload' button." Below the text area is a "Browse..." button and an "Upload" button. At the bottom of the section is a "List of Uploaded File(s)" area and a note: "You can click the delete button to delete a selected file. However, once the evaluation is submitted, you cannot delete any of the files you uploaded."

Obtaining Supervisor Approval and Submission to HR

Once you have clicked the “Save and Proceed” button the following will appear at the bottom of the evaluation.

	1.	How many hard-copies do I need to submit to HR? When the evaluation is complete you will need to print one copy. Have it signed by the employee and all his/her supervisors and give it to your department secretary who will forward it to HR.
	2.	Do I have to print the supporting documents? Yes, if you have any supporting documents attached to this evaluation, please print them and staple them together before handing them to the HR Office.
	3.	Why are some buttons below missing? They are missing because the evaluation appraisal form is incomplete. Look for areas that say incomplete in red and complete them.
	4.	Why is the approval path missing? Click the [Generate Approval Path] button to generate it. In the past, it would auto-generate it but now, you have to generate it when you are done with the appraisal form. The reason for this is that in our organization, we change supervisors very frequently and we do not want to generate the approval path ahead of time.
	5.	Why do I see some supervisors's names more than once in the approval path? This happens when you do the evaluation half way and then forward the evaluation to another supervisor. Due to the supervisor change, the approval path will be re-generated and the prior approval path will be kept regardless if someone has approved it or not. In some situations, the new and the original approval paths will contain the same people.
	6.	What should I do if I submit the evaluation form to HR by accident? Call HR office and they will unsubmit it.

Helpful tips to consider when finalizing an evaluation

If you submit the evaluation to HR by accident call Amy at x7196 and we can send it back to you.



Every supervisor from you to your department director will need to approve the evaluation before you meet with the employee. When you click this button the system will send an email to every supervisor asking them to log into the evaluation program, read and approve the evaluation. Supervisors can approve the evaluation or if they would like something changed they can enter that information on their approval screen. The supervisor doing the evaluation will receive an email from each supervisor above them which will contain their comments.

Once the evaluation has been approved by all supervisors you can meet with the employee. Print a copy of the evaluation and have it signed by the employee and you. The original signed evaluation is sent to HR to go into the employee's personnel file. Based on your departments policies you will either now click the “final submission to HR office” button or your department secretary will submit it to HR for you.

Things to Remember

- Annual evaluations will be sent to you to complete on March 1st , they are due by May 31st.
- Probationary evaluations for every department except Police and Fire will do evaluations every 3 months during the 6 month probation period. Police and Fire will do evaluations every 6 months during the 12 month probation period.
- Probationary evaluations are sent out one month prior to their due date.
- Completing the evaluations on time is extremely important. If there is an outstanding evaluation for an employee in June when Directors begin working on merit increases, that employee will not be eligible for an increase. Also, while an employee is on probation it will mess up the evaluation if two evaluations are due for the same employee. Don't get behind!
- Remember to take your time completing an employee evaluation. Don't rush it. It is important that the evaluations are well thought out and meaningful. Every employee deserves to see how they are performing, at least annually. They should also be told if their goals are being met and what new goals need to be worked on.
- Always meet with the employee one on one in a private setting. Do not hand the employee their evaluation without taking the time to review it with them.