

Job Aid



Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees – Performance Document – Line Manager

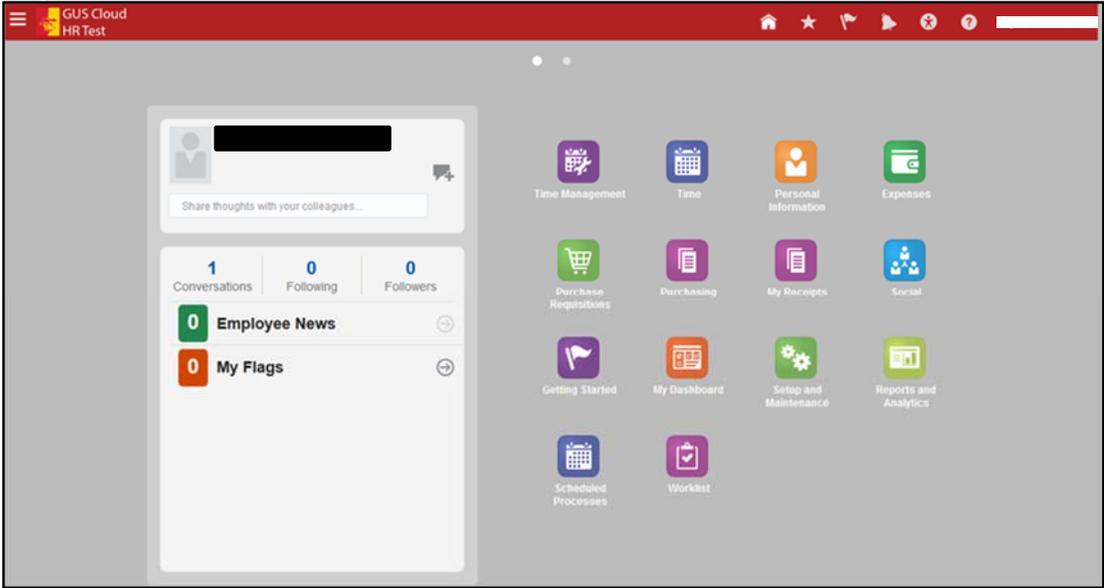
This Job Aid walks line managers through the process of completing the performance evaluation for their direct reports for the Goals & Performance Evaluation Process.

Audience: USS Employees with benefits that are required to have an annual or probationary performance evaluation.
Unclassified Administrative & Professional Employees with benefits in non-instructional positions that are required to have an annual performance evaluation.

NOTE: Faculty do not use this process

HRS Web Resources: See [Goals and Performance Evaluation Process for USS and Unclassified Administrative & Professional Employees](#) for an overview of the performance evaluation process and information on setting goals and types of goals.

NOTE: Before you begin the Performance Evaluation make sure you have assessed any goals that were established for this review period.

Step	Action
1.	Logon to GUS Cloud. 
2.	On the GUS Cloud springboard, select the Navigator icon. 

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3. Select “Performance” under “My Team.”

Navigator

- Product Management
 - Ideas
- Payables
 - Invoices
- General Accounting
 - General Accounting Dashboard
 - Journals
 - Period Close
- Financial Reporting Center
- PSU Resources
 - PSU Pay Periods and Pay Check...
 - GUS HR Training Resources
 - GUS Finance & Procurement Tra...
- Payroll
 - Accounting Distribution
- My Team
 - My Team
 - Team Talent
 - Goals
 - Performance**
 - Talent Review
- My Dashboard
 - Tools
 - Set Preferences
 - Download Desktop Integration ...
 - Worklist
- About Me
 - Career Development
 - Career Planning
 - Goals
 - Performance
 - Skills and Qualifications
 - Personal Information
 - Time
 - Expenses
 - My Account
- Directory
 - Directory
- Social
- Getting Started

4. Your “My Manager Evaluations” page will open.

My Manager Evaluations

Overall Completion Progress

Filter

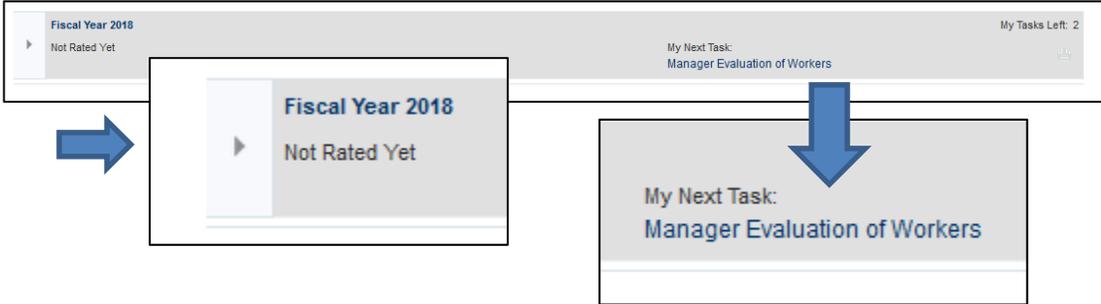
Assistant Director

February 2018 Probationary Period	My Next Task	My Tasks Left: 2
Not Rated 'Met'	Manager Evaluation of Workers	
Fiscal Year 2018	My Next Task	My Tasks Left: 2
Not Rated 'Met'	Manager Evaluation of Workers	

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5.	<p>This page will display all your direct reports and the performance evaluations that have been completed or will need to be completed.</p> 
6.	<p>In the gray box next to the employee's name, click on "Manager Evaluation of Workers" under "My Next Task" to complete the evaluation. If more than one review period is available, you will need to select the appropriate review to complete.</p> 
7.	<p>A Create Performance Document pop up box will appear. The Start Date, End Date and Manger Name (your name) will be populated.</p> <ul style="list-style-type: none">• If this is an annual review, do not change the dates.• If this is a review for an employee that will be leaving PSU or changing positions, change the End Date to the employee's last day in the current position. <p>Click "Continue"</p>

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18 Create Performance Document

Review Period Fiscal Year 2018

* Start Date 6/18/17

* End Date 6/16/18

Manager Name

Continue Cancel

A confirmation box will appear. Click “OK” to continue

Confirmation

The performance document was created.

OK

8. This will open the Performance Document page.

Fiscal Year 2018

Task Manager Evaluation of Workers

Attachment Score

Show More

Goals

Sort By Name Show All Comments Add

0 / 2 Ratings Entered

0 / 2 Comments Entered

Performance Factors

Overall Summary

Goals	Attachment	Score
Mass Assigned Goal for All Employees	Financial	Manager
Test Goal for Line Manager Approval	Project Goal	Manager

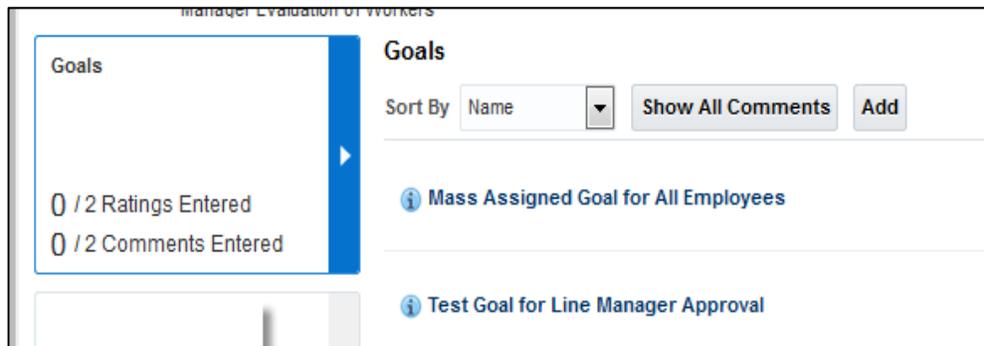
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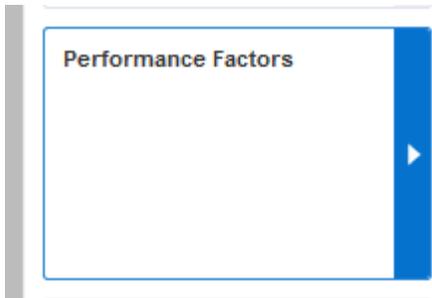
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Please note the Performance Document has three sections. Click on the arrow to open the contents of each section.

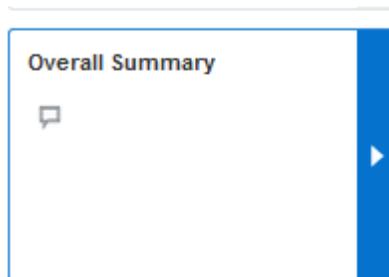
1. Goals – lists any goals for the review period for the employee



2. Performance Factors



3. Overall Summary



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9. To view the goal details, click on the goal name. Make sure the goal has been assessed.

Goals

Sort By

[Mass Assigned Goal for All Employees](#)

[Test Goal for Line Manager Approval](#)

If you did not assess the employee’s goals in “My Team Goals,” will need to do this before you continue.

- Click on the goal name
- Click “Edit” in the Goal Details section
- Assess the goal, click “Save and Close”

When the employee’s goal has been assessed, you will need to “Rate” the goal in the Performance Evaluation Process.

Goal: Test Goal for Line Manager Approva

Description Transition Payroll

Ratings and Comments

Manager

Worker Comments

Manager Comments

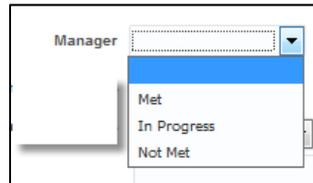
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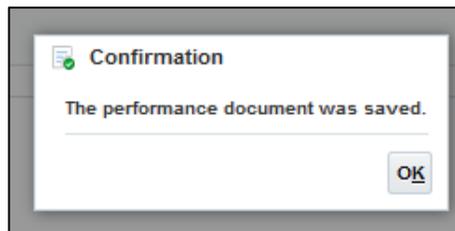
Manager – select the goal rating

- Met
- In Progress
- Not Met



Enter Manager Comments

Click “Save” in the upper right-hand corner. A confirmation box will appear. Click “OK”



Click “Done” in the upper right-hand corner. You will return to the performance review page.

If you do not rate all of the goals in the performance evaluation process, you will get an Error message when you submit the performance document. Click “OK” and rate the goal.



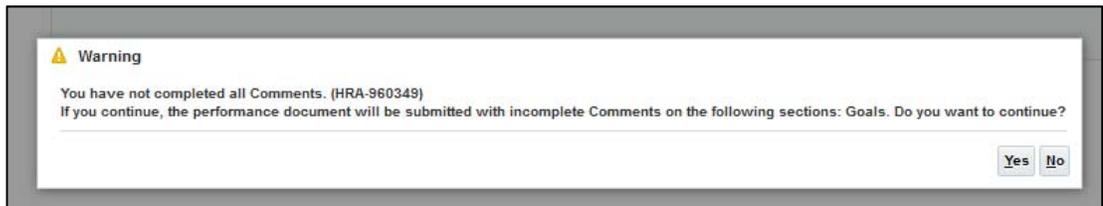
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10. Click on the arrow in the Performance Factors box to rate the performance factors.

- Select a rating for each factor
- Enter comments as needed. If you do not enter comments, you will get a Warning message when you submit the performance document.
 - Click “Yes” if you want to continue without entering or reviewing comments
 - Click “No” if you want to enter or review comments for any of the Performance Factors that do not have comments.
 - Best practice would be to click “No” so you can review the Performance Factors to make sure you have made comments as appropriate.



11. Click on the arrow in the Overall Summary box to assign and overall rating and add comments. Please note that comment are required.

Manager – select the overall rating

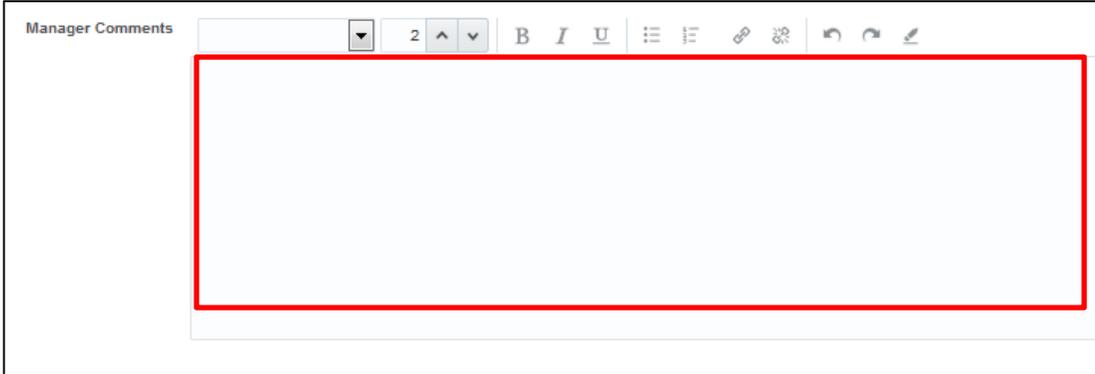
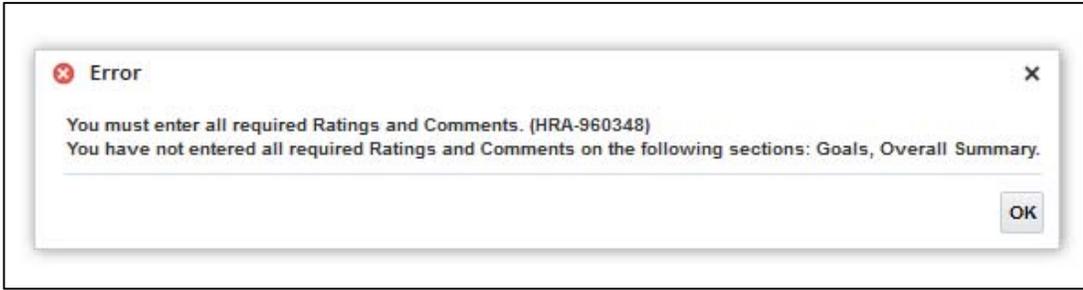
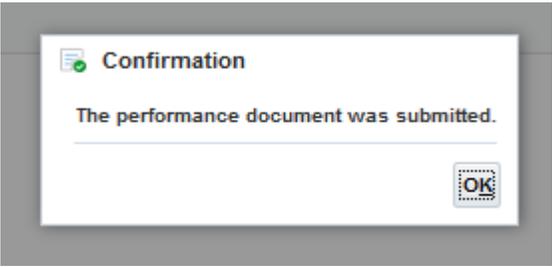
- Exceeds Expectations
- Meets Expectations
- Needs Improvement
- Unsatisfactory



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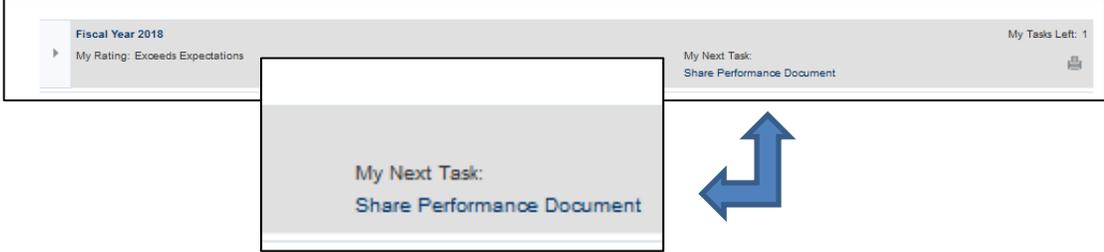
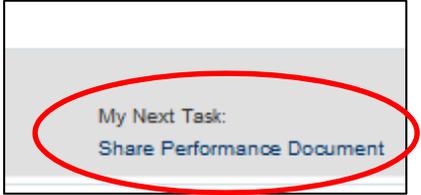
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	<p>Enter Manager Comments</p>  <p>If you do not enter comments in the Overall Summary, you will get an Error message when you submit the performance review. Click “OK” and enter required comments.</p> 
12.	<p>Click “Submit” You will get a confirmation box. Click “OK”</p> 

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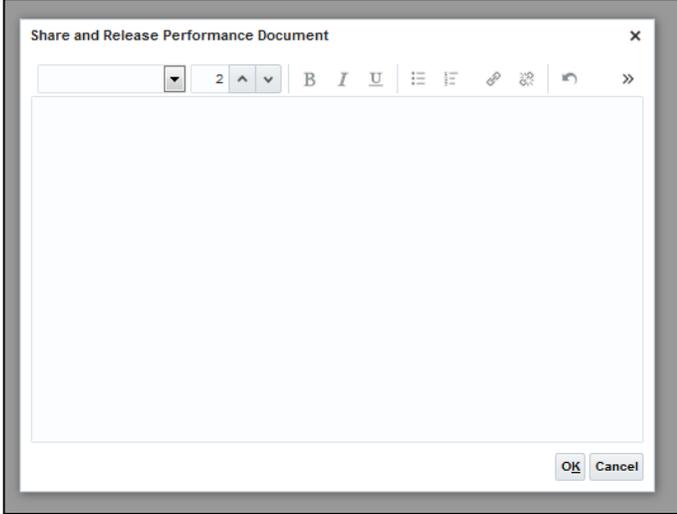
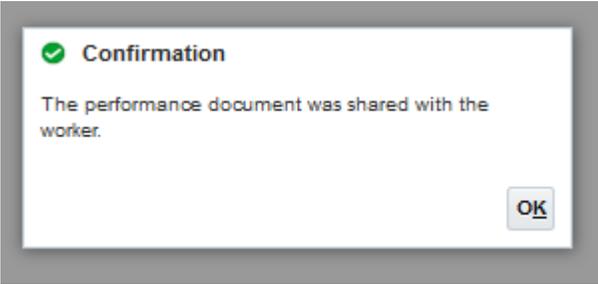
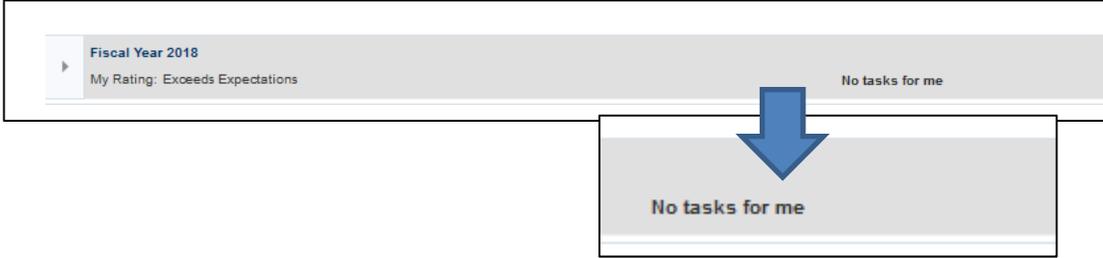
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13.	<p>You will return to the “My Manger Evaluations” page. In the gray box next to the employee’s name, under “My Next Task” the status will be changed to “Share Performance Document.”</p> 
14.	<p>Click on “Share Performance Document” when you are ready for the employee to be able to view and add comments to the performance evaluation.</p>  <p>You will return to the employee’s performance document, click on “Share and Release” in the upper right-hand corner.</p>   <p>You will get a Share and Release Performance Document box to add any comments. Click “OK”</p>

Job Aid



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	 <p>A confirmation box will appear. Click “OK”</p> 
15.	You will return to the “My Manger Evaluations” page. In the gray box next to the employee’s name, the status will be changed to “No tasks for me.” 
16.	You have completed the Performance Evaluation for the employee.