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 Performance Evaluation Process 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.	Log on to GUS Cloud. It will open the Me springboard. Select the **My Team** tab.
2.	On the My Team springboard, select **Performance**.
3.	Your "My Manager Evaluations" page will open. If more than one review period is available, you will need to select the appropriate review period from the drop down at the top of the page.
4.	In the gray box next to the employee's name, click **Manager Evaluation of Workers** under "My Next Task" to complete the evaluation.
5.	A Create Performance Document pop up box will appear. The Start Date, End Date and Manger Name (your name) will be populated. • 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. Click **Continue** A confirmation box will appear. Click **OK** to continue

6.	This will open the Performance Document page.
7.	The Performance Document page has the following sections: 1. Document Details 2. Overall Summary 3. Evaluation Topics a. Goals b. Performance Factors 4. Attachments You can expand or collapse each section by clicking on the arrow. When the section is expanded, you can Edit that section.
8.	Expand the Evaluation Topics section to access the employee's Goals and/or Performance Factors.
9.	Goals 1. Click on **Goals** to review the employee's goals. Click on the **Goal Name** to view the goal details and/or edit that goal. 2. Click on **Evaluate** to rate or assess the goal. You can click on **Evaluate** at the top of the Goals page or in the Evaluation Topics section next to Goals. 3. Click **Save and Close**.
10.	Performance Factors 1. Click on **Evaluate** in the Evaluation Topics section next to Performance Factor to rate the factors. 2. Click on **Edit** at the top of the page to rate the Performance Factors. 3. Click **Save**. 4. Click the back arrow next to the employee's name to return to the Performance Document page.
11.	Overall Summary 1. Click **Edit** in the Overall Summary to add comments and select overall Manager Rating from the drop down.

	2. Click **Save**
12.	Click **Submit** when the Performance Review is complete
13.	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."
14.	Click on **Share Performance Document** when you are ready for the employee to be able to view and add comments to the performance evaluation.
15.	You will return to the employee's performance document, click **Share and Release** in the upper right-hand corner. You will get a Share and Release Performance Document box to add any comments. Click **OK** A confirmation box will appear. Click **OK**
16.	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."
17.	You have completed the Performance Evaluation for the employee.