

# MTSU Performance Quick Guide for Supervisors

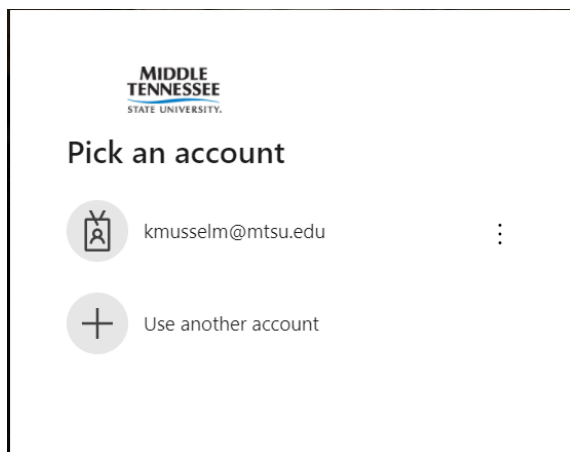


Welcome to a quick guide on how to navigate the new performance system.

We have added the following types of evaluations to the online system

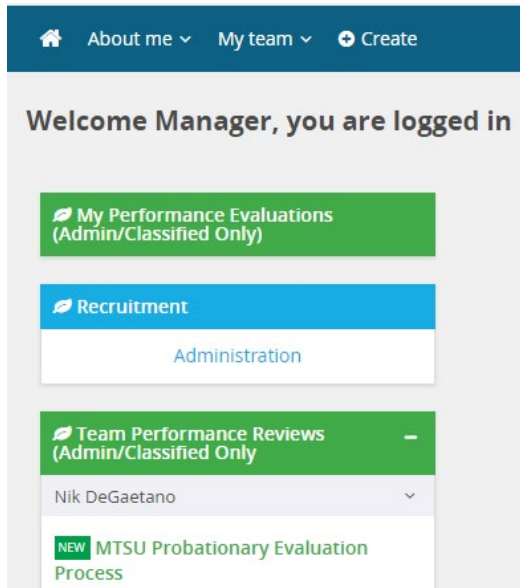
- MTSU 2020 Evaluation Process
- MTSU Probationary Evaluation Process
  
- This guide will focus on how to complete the MTSU 2020 Evaluation Process

To Begin click on the [Employee Services Portal Link](#) - Log in with your MTSU Credentials .



Once you have logged in you will be brought to the Supervisors Employee Services Dashboard

You will see two areas at the top of the Page, About Me and My team – You will also see in the middle of the page 2 Widgets: one for your evaluation (My Performance Evaluations (Admin/Classified Only) and one for your Team’s evaluations (Team Performance Reviews (Admin/Classified Only)).



The **About Me** area contains your Journal and Your Performance Review

The **My Team** area contains -Your Organizational Chart, Team Details, Recruitment and Your Teams Performance Evaluations.

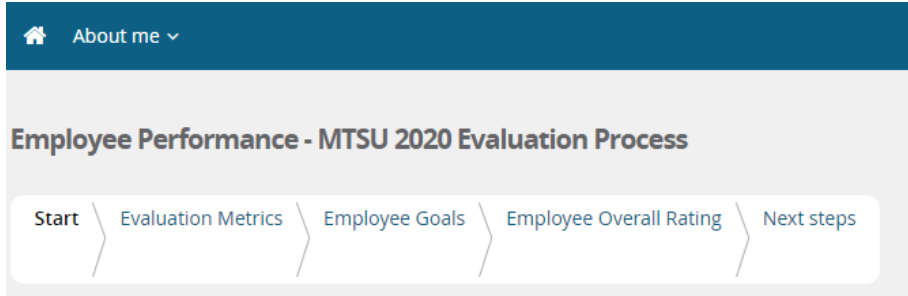
The two widgets in the middle of the page are quick links to access the various evaluations requiring your attention.

Each Evaluation process that has been created has similar steps for the MTSU 2020 Evaluation Process. Here are the steps involved in completing the entire evaluation process.

- ✓ **Step 1 - Employee Self Evaluation**
- ✓ **Step 2 - Supervisor Completes Evaluation**
- ✓ **Step 3 - One Up Manager Review**
- ✓ **Step 4 - Employee / Manager Evaluation Discussion**
- ✓ **Step 5 - Employee Acknowledges Evaluation**
- ✓ **Step 6 - Evaluation Complete**

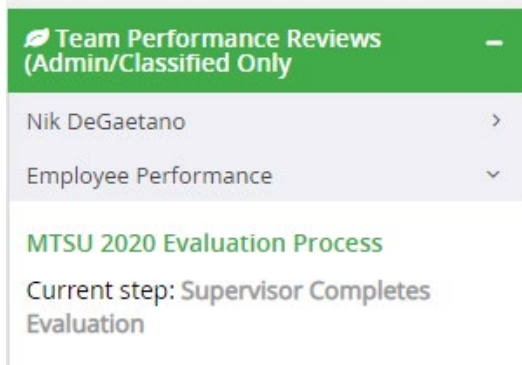
**Step 1 - Your employee will complete their Self Evaluation;** this step is optional. The evaluation contains three sections:

Evaluations Metrics, Employee Goals and Employee Overall Rating



Once your employee has completed their self-evaluation you will receive an email notifying you that it is time to complete your employee’s annual evaluation.

**Step 2 - Supervisor Completes Evaluation** -To complete the evaluation you will log in and click on the review for your specific employee.



This will bring up the employee’s evaluation including the evaluation metrics, employee goals and employee overall rating sections.



Clicking **Next** at the bottom of the page will allow you to move through each tab. For each comment entered, click **Save & Share** otherwise your comments will not be visible to your supervisor for review or visible to your employee. NOTE: The Supervisor Evaluation will NOT be visible to your supervisor or the employee until it is in their queue to approve or review.

**Tab 1 – Evaluation Metrics** – As a supervisor, you are required to complete each metric in the evaluation and provide a comment for each rating you have given.

**Tab 2 – Employee Goals** – If your employee has added goals to the evaluation, you will need to add a comment for those goals. You can add additional goal(s), however for each goal added, you will need to enter a comment.

**Tab 3 – Employee Overall Rating** – Supervisors are required to enter an overall rating and a comment to substantiate the rating. You will not be able to submit the evaluation to your supervisor unless all fields are completed.

**Tab 4 - Next Steps** – This tab allows you to scroll to the bottom of the page and add final comments if desired. If you do not desire to make further comments, click Next, click on **Go To Next Step**.

**Step 3 – One Up Manager Review** – In this step, your One up Manager has the opportunity to review and approve the evaluation. If they are requiring revisions to the evaluation they will need to contact [Trina.Clinton@mtsu.edu](mailto:Trina.Clinton@mtsu.edu) or via telephone at Ext. 5344 for instructions. She will return the evaluation to you for your One Up Manager. Any comments the One-Up Manager has made on the evaluation will be able to be viewed by not only you, but the employee as well. Once you have received approval from your One Up Manager, Click on Go to Next Step.

**Step 4- Employee / Manager Evaluation Discussion** - You will need to schedule a meeting with your employee to review their evaluation.



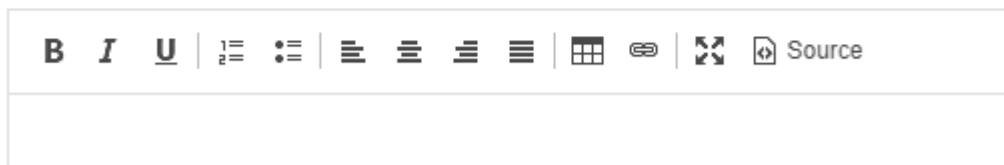
You cannot make any changes at this step but on the Final tab – Next Steps -you can scroll down to the bottom of the page and leave a Final Comment

#### Final comments

#### Employee Performance

No comments made

#### Manager Performance



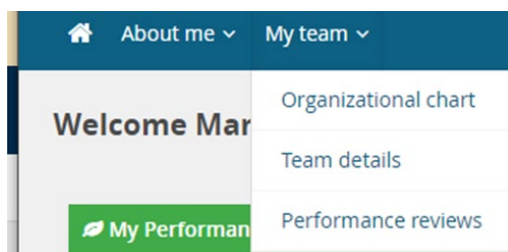
Click go to Next Step – you have now completed the Supervisor portion of the evaluation Process

**Step 5** –The Employee acknowledges their review and **Step 6** is the Evaluation Complete step.

#### Special Notes:

**To view completed reviews** - Log into the performance portal – Go to **My Team**

Click on **Performance reviews**



Change the Status to Complete or all and click search

The screenshot shows a web interface for 'My team performance reviews'. At the top, there are navigation links for 'About me' and 'My team', along with a 'Journal entry' button and a user profile for 'Manager'. The main section contains search filters: 'Employee first name', 'Employee last name', 'Level' (set to 'All'), 'Review process step' (set to 'Select'), 'Status' (set to 'Current'), and 'Job Class'. A 'Status' dropdown menu is open, showing options: 'Current', 'Complete', 'Status (Archived)', and 'All'. The 'Complete' option is highlighted. There are 'Clear' and 'Search' buttons to the right of the filters.

Locate your employee and click on View Report

The screenshot shows a table with columns for 'Employee Performance', 'Staff Annual Evaluation (Full-Time) STATUS', 'Evaluation Complete', 'N4-Payroll Asst', '5 Nov 2020', '15 Jan 2021', 'I want to...', and 'View report'. The 'STATUS' column contains the text 'ARCHIVED'.

Employee Performance	Staff Annual Evaluation (Full-Time) STATUS	Evaluation Complete	N4-Payroll Asst	5 Nov 2020	15 Jan 2021	I want to...	View report
	ARCHIVED						

You will be able to print and/or save to pdf if you would like, but it is not necessary as you will always have access to the evaluation as long as the employee reports to you.

**Second Note:** If for some reason you acquire a new employee or there is some kind of supervisor change, as the Supervisor you are able to accept a review from a different supervisor or leave the review with the Existing Supervisor to finish.

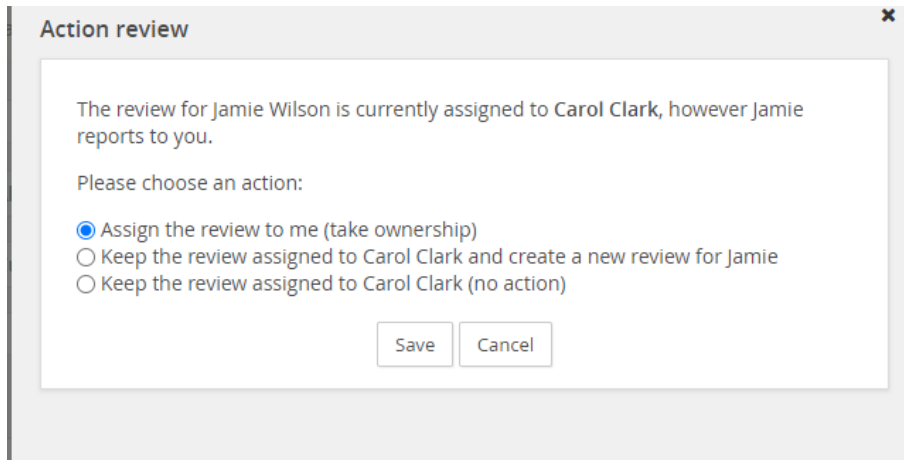
Here is how you would see that information:

The new manager for an employee will now see an action alert for the employee allowing them to take ownership for the employee's performance review. The action alert will be displayed when one of the above cases is detected, as follows:

- On My team > Organizational chart
- On My team > Performance reviews

On Dashboard > Team Performance Reviews widget on the dashboard.  
Notification contains a link that guides manager to My team performance reviews page

The Supervisor will click on **Action Review** then be presented with this message.  
You can choose to accept the evaluation or leave it with the existing supervisor



The image shows a dialog box titled "Action review" with a close button (x) in the top right corner. The dialog contains the following text: "The review for Jamie Wilson is currently assigned to Carol Clark, however Jamie reports to you." Below this, it says "Please choose an action:" followed by three radio button options: "Assign the review to me (take ownership)", "Keep the review assigned to Carol Clark and create a new review for Jamie", and "Keep the review assigned to Carol Clark (no action)". At the bottom of the dialog are two buttons: "Save" and "Cancel".

**Action review** ✕

The review for Jamie Wilson is currently assigned to Carol Clark, however Jamie reports to you.

Please choose an action:

- Assign the review to me (take ownership)
- Keep the review assigned to Carol Clark and create a new review for Jamie
- Keep the review assigned to Carol Clark (no action)