

# Self Evaluation

---

Completing the Self Evaluation allows employees to provide input and feedback on their performance. Comments, ratings and attachments from a completed Self Evaluation are visible in the Manager Evaluation.

Reminder emails are sent 30, 15 and 7 days before the Self Evaluation is due, if not already completed.

**NOTE:** While completing the Self Evaluation, click the **Save** button to save progress.

**Follow institution and manager recommendations for using this tool as part of the performance management process.**

## Performance Criteria

1. Review the performance criteria listed on each tab.
2. Use evaluation tools to provide feedback. Performance criteria, evaluation tools, and tabs will vary by institution and evaluation type.
  - **Employee Rating** – Select a value from the drop down.  
**NOTE:** To see more information about the ratings, click the yellow paper icon next to the field.
  - **Employee Comments** – Enter information into the Employee Comments field.  
**WARNING:** Copying and pasting from another document may cause issues with punctuation.
    - Formatting tools are available at the top of the comment box.
    - Spell Check is available using the book and check icon.
  - **Summary Section** – Enter overall feedback for that section in the Employee Comments field.  
**NOTE:** If a section summary rating exists, it is likely a calculated rating based on an average of the section's item ratings and cannot be changed.

## Overall Summary

1. Select an **Employee Rating** from the drop down, if applicable.  
**NOTE:** For many institutions, the Overall Summary rating is a calculated average based on other section summary ratings and cannot be changed.
2. Enter **Employee Comments** to provide feedback on overall performance.

## Add Attachments

Attachments can be added during the Self Evaluation and Manager Evaluation steps and are visible to both employee and manager. All attachments are included in the completed evaluation when added to the employee's electronic Personnel File.

**WARNING:** Attachments must be a PDF document.

1. Click the **Add Attachment** hyperlink located at the bottom of the page.
2. Click **Browse** to find and select the document.
3. Click **Upload**.
4. Enter a **Description** (optional).
5. To delete an attachment, click the trash can icon next to the document to delete, click **OK**.  
**NOTE:** Employees and managers can only delete the documents that they have added.

## Complete the Self Evaluation

1. Click **Complete**, in the upper right corner.

2. Click **Confirm**.

**NOTE:**

- Once the document has been marked complete, it can no longer be edited.
- An email notification is sent to the manager.