

## INSTRUCTIONS FOR COMPLETING THE EMPLOYEE PERFORMANCE MANAGEMENT PROCESS FORM

All fields in the Word document can be filled in by putting the cursor in the gray boxes and typing in text. The information can be saved throughout by clicking File: Save.

1. **HEADER:** Enter the employee information and review dates in the header of the first page of the form. **Employee's M# is required.**
2. **PERFORMANCE GOALS/OBJECTIVES:**
  - a. At the planning meeting, fill in one to four goals that the employee will focus on for the year.
  - b. At the final review meeting, for each goal fill in comments and recommendations and enter a final rating.
3. **JOB-RELATED COMPETENCIES:**
  - a. At the planning meeting:
    - i. From the Performance Management Competency Library, choose one to four job-related competencies that employees will focus on to achieve their goals.
    - ii. Copy the competencies and relevant indicators, and paste them into the form.
  - b. At the final review meeting, for each competency fill in comments and recommendations.
4. **DEVELOPMENT OPPORTUNITIES:**
  - a. Using the provided list or other resources, choose and fill in appropriate development opportunities that the employee will pursue throughout the year.
  - b. Throughout the year, record notes on the employee's progress on these opportunities.
5. **PLANNING DISCUSSION ACKNOWLEDGEMENT:** Both employee and supervisor sign to acknowledge that the planning discussion has taken place and copies have been given to both individuals.
6. **PERIODIC FEEDBACK:** As the supervisor gives feedback about the employee's performance, he or she can record notes throughout the year.
7. **FINAL REVIEW**
  - a. Choose the employee's overall rating by typing in the letter rating.
    - i. If the employee gets a **B** rating of Below - *Did Not Achieve Expected Results*, a Performance Improvement Plan (PIP) is required. Contact your HRSC Director or Labor Relations for assistance with a PIP.
  - b. Fill in comments on the employee's overall performance.
  - c. Employees can also enter their comments.
8. **FINAL REVIEW ACKNOWLEDGEMENT:** Both the employee and supervisor sign a printed hardcopy to acknowledge that the final review discussion has taken place. The employee's signature does not necessarily mean that he or she agrees with the performance evaluation.
9. **FINAL REVIEW RECORDING:** Send the completed final review to Human Resources by scanning the document and emailing the document to [hronestop@ucmail.uc.edu](mailto:hronestop@ucmail.uc.edu). Please put "Performance Management: Employee's Name" in the subject heading. If you do not have a scanner, please contact HR at [hronestop@ucmail.uc.edu](mailto:hronestop@ucmail.uc.edu).

