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# Staff Evaluation - Performance Management

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## Staff Performance Appraisals

April 1<sup>st</sup> marks the beginning of the 2017 Staff Employee Annual Performance Appraisal (APA) process. During this process, staff employees who started on or before March 1, 2017 are evaluated for the period from April 1, 2016 through March 31, 2017. Supervisors will complete the performance appraisals in Talent Management.

There are ten different staff employee Annual Performance Appraisal programs in Talent Management. Employees are assigned the review program that directly relates to the responsibilities associated with their position. A section included in each of the ten Annual Performance Appraisal programs is the Employee Self-Evaluation. This step is **Optional** and supervisors may ask employees to complete it as part of the evaluation process.

You are asked to complete the appraisal tasks in the following order:

**April 1- 8, 2017** Employees complete Self-Evaluations in Talent Management if instructed to do so by their managers. Once submitted, the manager will be notified by e-mail that the employee has completed the self-evaluation. Managers may begin rating the appraisal factors in the system during this period, but cannot submit the review until after the employee self-evaluation period closes on April 8, 2017. The manager can re-open the self-evaluation step beginning April 9 if the employee is unable to complete his or her inputs by April 8 (please see Page 4 of the Manager's tutorial for more information on reopening this step).

**April 1 – 20, 2017** Managers complete Performance Appraisal factors for assigned employees in Talent Management. Once notification is received that the employee's self-evaluation, if requested, is complete, the manager completes the inputs for the performance appraisal factors and schedules the Review Meeting with the employee.

**April 28, 2017** Managers must conduct the review meeting no later than April 28.

Once the manager conducts the review meeting with the employee and acknowledges it in Talent Management, the Employee Acknowledgment (the last step in the Annual Performance Appraisal process) opens up.

**April 30, 2017** The employee completes the Employee Acknowledgment step in Talent Management no later than April 30, validating receipt of the review. The appraisal period ends and Talent Management closes down all ten review programs.

The employee appraisals include a section regarding the professional development requirement. The Finance and Operations Human Resources Policy B-5, Employee Development, states that beginning January 2014, annual professional development is required of all staff employees, including administrators.

Non-supervisory staff employees must complete a minimum of eight (8) hours of job-related professional development training annually. Supervisors, managers, and other executives (administrators) must complete a minimum of twelve (12) hours. If a new employee has been in a position for 1 quarter or less by the end of the period, the requirement may be prorated accordingly (in other words, 12 months / the required credit x number of months employed = total required credits).

## What's New!

To assist supervisors in determining if their subordinates have met their annual professional development requirement, Human Resources has created and shared a custom report with supervisors that shows the training credits for their subordinates in Talent Management. Supervisors can access the report, titled "2017 Transcript Report for My Subordinates," by going to Talent Management (**My Sam>Employees tab>Human Resources>Talent Management**) and clicking on **Reports>Custom Reports**. Be sure to refresh the report prior to viewing it by clicking on the Actions tab. A step-by-step tutorial on how to view custom reports is provided below.

We have prepared the following tutorials to help guide employees through the Annual Performance Appraisal process:

## Preparing for the Appraisal:

### Viewing Custom Reports Shared with You in Talent Management

(<http://www.shsu.edu/dotAsset/6e7966c2-477d-4cda-bc2c-b98bcf602fef.pdf>)

### How to Run a Transcript Report to Determine Professional Development Credit

(<http://www.shsu.edu/dept/human-resources/training/documents/How%20to%20run%20a%20Transcript%20Report2.pdf>)

## **Supervisor Information:**

### Completing the Annual Performance Appraisal in Talent Management - Supervisor

Role (<http://www.shsu.edu/dotAsset/6a65b3c0-dfd3-41d7-af5a-3f0f96ef5109.pdf>)

### Completing the Six Month Performance Review in Talent Management - Supervisor

Role (<http://www.shsu.edu/dotAsset/a5a0d1d6-b2f5-41b7-be2a-58e6ff6ce761.pdf>)

## **Employee Information:**

### Completing the Annual Performance Appraisal in Talent Management - Employee Role

(<http://www.shsu.edu/dotAsset/ae9c19c2-5289-4ca2-a859-73060a95547a.pdf>)

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