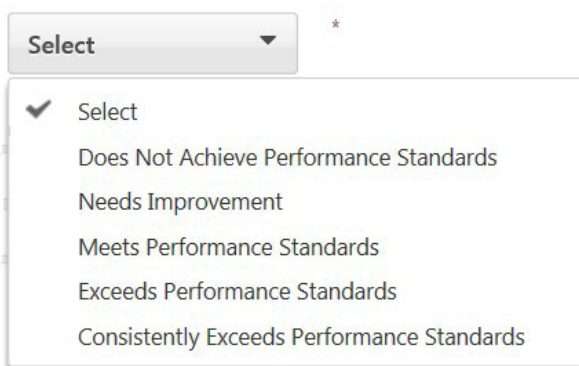


# Evaluations: Supervisor Guide

As a Supervisor, your role is to create an evaluation on each employee and to review the approved evaluation with the employee. Follow these steps to accomplish this task.

1. Log in by clicking on Access Talent Management System in the Talent Management System card in [MyISU](#).
2. Click on the **Your Action Items** heading to see the complete list of tasks awaiting your attention.  
*(Note: Only a partial list displays below that heading.)*
3. Begin the evaluation by clicking on the employee's name to open the **Overview** page. Pay special attention to the information under the **Supervisor** heading, which describes your role in this process, as well as the **Review Step Progression** chart at the bottom that tracks progress through the evaluation process. Click **Get Started**, bottom right.
4. **Performance Evaluation Job Details**. Type or paste text to fill these required boxes. Text entered here will be carried forward to next year's evaluation. Your response in each section is limited to 3,000 characters. Click **Save and Continue** to move to next section.
5. **Performance Evaluation Competencies**. Evaluate employee on each of the listed competencies. Employee self-evaluation comments can be seen above the Comments section. For each competency, choose a rating after reviewing the examples that are provided for each rating level of the given competency. Click the **Select** button and then click the desired rating. Enter support for your rating in the **Comments** section. *(Note: If you do not enter comments, your evaluation will be returned to you.)* When you are finished, click **Save and Continue** to move on in the evaluation, or **Save and Exit** to close the evaluation.
6. **Performance Evaluation Goals**: Use this section to set goals for the employee for the next review period. Any goals entered here will be brought forward into the next evaluation, and employees will be able to check their progress on these goals. Create goals using one of two methods: **Regular** and **Wizard**.
  - **Regular method**: Click **Add Goals** to open the **Create Goals** window. Complete the Goal by working your way down the screen: Title, Description, Start and Due Dates, Categories, Tasks, and Targets. Click on the icon next to **Categories** to see the 4 Core Themes for ISU, to tie the goal to one of those themes. Each Task or Target must be assigned a weight, and the weights need to add up to 100 for all the tasks or all the targets in each goal.



The image shows a dropdown menu with a 'Select' button at the top. Below the button, there are five options listed: 'Select' (with a checkmark icon), 'Does Not Achieve Performance Standards', 'Needs Improvement', 'Meets Performance Standards', and 'Exceeds Performance Standards'. The 'Select' option is currently selected.

- **Wizard method:** If you are familiar with the SMART goal process, you can click on the **Wizard** button (upper right), which will open a new window to coach you through the SMART goal steps (Specific, Measurable, Actionable, Relevant, and Timely).
  - When you are finished with a particular goal, click **Save**. Repeat these steps to add additional goals as desired. When you are finished, click **Save and Continue** (*do NOT click Submit yet*).
7. **Summary:** This shows the employee's overall rating, calculated from the individual ratings you entered. Once you have reviewed the rating, click **Submit\***. This moves the evaluation on to the next person in the list.

**\*Co-Planners:** If someone else will also be evaluating this employee (due to dual report positions, for example), do NOT complete step 7, above until the Co-Planner has done his/her evaluation. Follow these steps to add a Co-Planner to this evaluation.

1. Click **Options** in the upper corner of the **Summary** screen, and from the drop down list select **Add Co-Planners**. Click on the search icon at the far right of the field to open a search window.
2. Type in the name, position, or manager you want to add and click on the magnifying glass icon, right.
3. Click on the name you want to add from the list of people who match your search.
4. You can add additional Co-Planners by searching again, or hit **Save** to save your selection.
5. To delete a co-planner, click on the x beside their name in the Add Co-Planners window.
6. **Important: Do NOT click Submit if you have chosen a co-planner.** Clicking Submit will send this evaluation on to the next level of evaluation, without giving the co-planner any access.
7. Contact the co-planner you added to coordinate who will actually submit this evaluation once the co-planner has completed evaluating the employee.
8. Click on **Log Out** in the upper right corner.



Note: Co-Planners perform the same steps as Supervisors, but are able to see the Supervisor's comments, ratings and goals, as well as being able to add their own. Warning: If the Co-Planner clicks the Submit button at any point while completing the evaluation, it will move on to the next person in the approval queue and the Co-planner and Supervisor will no longer be able to access the evaluation.

When both evaluators are finished, one should click the **Submit** button, and click it again when the **Submit Review** screen opens.

## **Signing-off on the Evaluation**

After the 2<sup>nd</sup> level supervisor review, the evaluation is sent back to you. You will get an email when the evaluation is ready for you to sign the review and meet with the employee. Once you sign the evaluation and submit, the evaluation will immediately be available for the employee to see. You should plan your

signing the evaluation in conjunction with the evaluation discussion with your employee.

1. Login to the TMS system and click on the evaluation you wish to sign off, shown in the **Your Action Items** section. The **Review Step Progression** chart will show that you are at the second to last step: Supervisor Sign Off. Click on **Get Started**.
2. On each page of the evaluation click **Next**. You cannot make any changes in the evaluation at this point.
3. Type in your first and last name in the **Manager** box and click **Sign**.
4. To finish this step, click **Submit**.
5. Review the evaluation with the employee and inform them to login to TMS, review, acknowledge, make any comments, and submit the evaluation.

## My Team

This link at the top of the TMS page provides you with access to your team's evaluations and goals year-round, and will provide historical data as well. You can use this to track individual employee's progress on goals through the year. If you have team members missing, please reach out to [hr@isu.edu](mailto:hr@isu.edu).