

# GPS Performance Appraisal Form - Researcher Overview

The GPS Appraisal Form provides supervisor and researcher a place to assess the researcher's performance based on goals and special projects with documentation of progress and/or outcomes.

## 1 Getting Started

Forms requiring actions or input are available in the GPS Inbox on the **Home** tab. The **My Forms** tab organizes all current and completed forms in a series of folders.

## 2 Navigation Links

Each section of the GPS Appraisal Form is listed as a clickable navigation button. As the form progresses through the workflow, additional sections may be added to the form. Detailed instructions and resource links are listed in the header of each section.

## 3 Setup and Section Details

During the appraisal process, update the support actions and status of goals including any special projects/assignments and workplace learning activities. Performance Goals and significant Special Projects require a priority weight.

**NOTE:** Goals and workplace learning activities may be automatically transferred from last year's process. Goals may be entered directly into the appraisal form. To add a goal to a section of the form, click the **Add New Goal** button. A new window will open. Complete all the text fields listed and click the save changes button to add the details to the form.

## 4 Ratings

During the annual appraisal, you and your supervisor rate your performance using the **Rating** drop-down menu for every Performance Goal and significant Special Project.

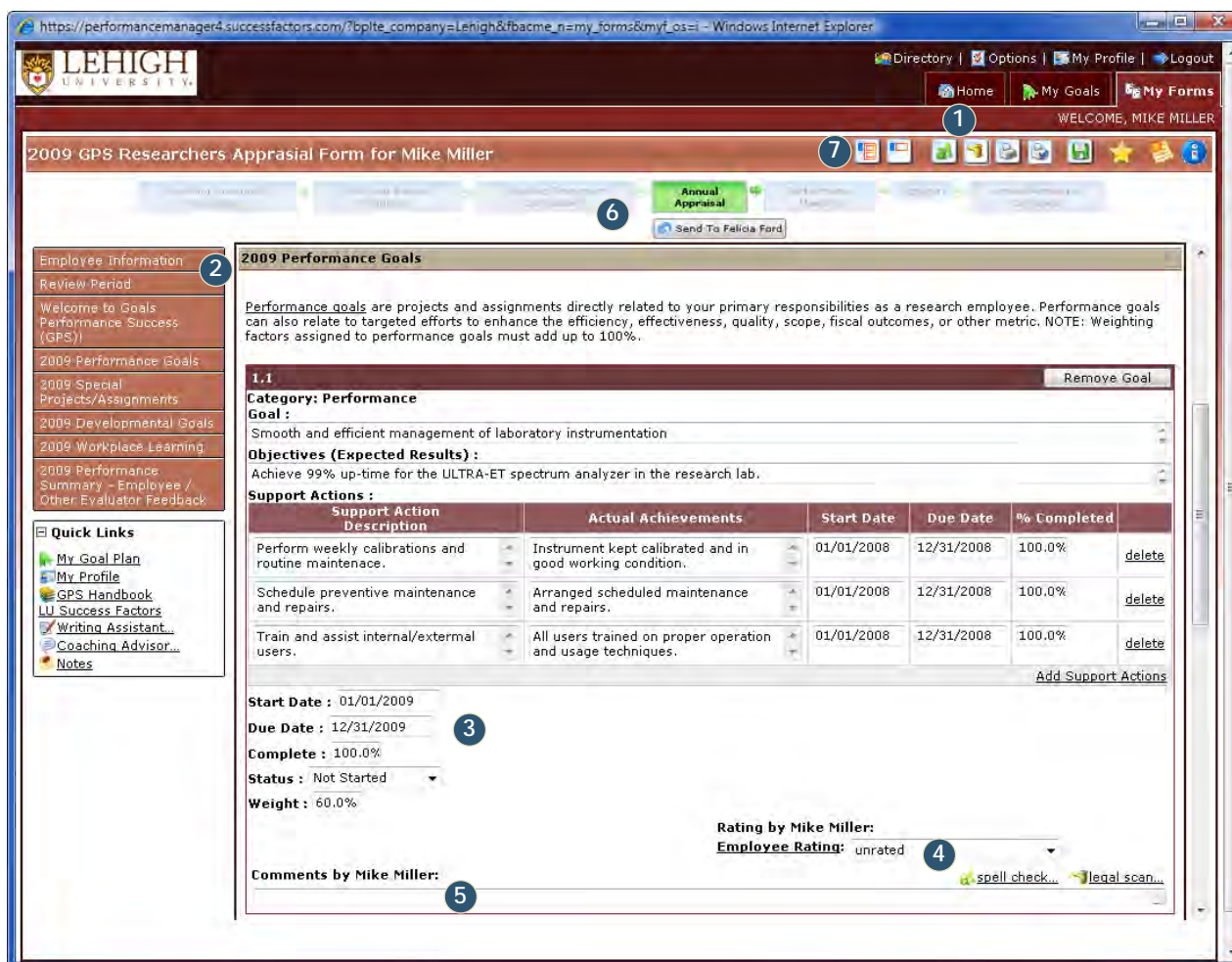
## 5 Comments

Use the **Comments** field to evaluate your demonstration of performance, areas for improvement, and/or examples to support the ratings provided.

## 6 Workflow Steps

The current step of the route map (i.e., workflow) is highlighted in a bright green progress bar. Routing options are listed below the progress bar and differ across the process.

**Route** - Routes the form between you and your supervisor for iterative review and input within a step without advancing to the next step.



## 7 Form Toolbar

Actions and tools applied to the entire form:

- View By Full Form** - Changes display to 'full form'.
- View By Section** - Changes display to 'section by section'.
- View By Item** - Changes display to individual items within sections.
- Spell Check** - Spell checks all comments on the form.
- Legal Scan** - Searches selected text and flags potentially inappropriate words in all comments on the form.

- Print** - Prints the form.
- Print Preview** - Prepares the form for printing.
- Save** - Saves changes to all sections of the form.
- Form History** - Searches for other forms relating to the researcher.
- Notes** - Creates notes to document particular issues or events relating to the researcher.
- Audit Trail** - Displays audit trail information related to the form.

# GPS Performance Appraisal Form - Main Sections



Employee Information
Review Period
Welcome to Goals Performance Success (GPS)!
2008 Performance Goals
2008 Special Projects/Assignments
2008 Developmental Goals
2008 Workplace Learning
2008 Performance Summary - Employee / Other Evaluator Feedback
Summary

## Information Sections

General information about you and your position will be auto-populated into the form by the HR administrators. We recommend that you check this information and contact Human Resources if there are any discrepancies.

- **Employee Information**
- **Review Period**
- **Welcome to Goals Performance Success (GPS)**

## Appraisal Sections

Each section of the appraisal form includes explanatory text and may contain links to other useful resources.

- **Performance Goals** - Add new goals and document support actions. During the appraisal, update the status, confirm or adjust weighting, select appropriate rating, and add comments for each performance goal.
- **Special Projects/Assignments** - Special projects or assignments are frequently based on the need to achieve other departmental priorities or to support University initiatives. You may be given an assignment because you possess particular skills or expertise that is needed to meet a short-term need. During the appraisal, update the status of special projects, weight and rate any significant projects, and add comments.
- **Development Goals** - Enter information in the same format used for other types of goals. Developmental goals are not part of the overall performance calculation. During the appraisal, update the status of developmental goals and add comments.
- **Workplace Learning** - List any courses, seminars, or workshops attended during the year. During the appraisal, update the status of these activities and add comments.

## Additional Sections

As the form progress through the workflow process, additional sections may be added to the form.

- **Mid-Year Review** - At mid-year, researcher and supervisor meet semi-formally to discuss progress and confirm priorities. This meeting is documented on the form with comments from the supervisor.
- **Performance Discussion** - At year-end, researcher and supervisor meet formally to review performance outcomes during the past year and plan for the next year. This meeting must be documented on the form with comments from the supervisor.
- **Performance Summary** - The supervisor will use the summary section to provide an overall year-end rating. The summary section lists the individual ratings and calculates an overall rating based upon the weighting and ratings.
- **Planning Sections** - The researcher and supervisor use the form collaboratively to establish next year's goals and other performance expectations. Goals entered into the current appraisal form are carried forward into the next appraisal form.
- **Signature** - Researcher and supervisor use the Signature section to document acknowledgement of the performance appraisal.

## Workflow Performance Review Process Steps

The researcher and supervisor work together to complete the review form. The current performance step is highlighted in bright green on the form with required routing actions listed below the progress bar:

### ➡ Working Document

Researcher and supervisor use the form to collaborate and track progress. During this step, both researcher and supervisor access the form in their GPS Inbox. When ready, the supervisor sends the form to the next step.

### ➡ Mid-Year Review

Researcher and supervisor meet for a semi-formal performance discussion. After documenting the mid-year discussion, the supervisor forwards the form to the next working document step.

### ➡ Working Document

During this step, both researcher and supervisor access the form in their GPS Inbox and utilize the form to track progress and outcomes. During the annual appraisal period, the supervisor sends the form to the next step.

### ➡ Annual Appraisal

The researcher receives the form and performs a self-appraisal of his/her performance, selecting ratings and adding comments on the sections of the form. The supervisor reviews the researcher's form, adds comments, and enters ratings creating an overall performance rating.

### ➡ Performance Meeting

During this collaborative step, supervisor and researcher meet formally to review past performance, set new goals, and identify other performance expectations for the next year. After the performance discussion, the supervisor returns to the appraisal form to document the discussion.

### ➡ Signature & Complete

The form is routed first to the researcher and then back to the supervisor for review and electronic signatures. Final comments can be added. At conclusion of the signature step, the form is completed and routed to both the supervisor and researcher's Completed folder in the My Forms tab.