

GPS Performance Appraisal Form - Supervisor Overview

The GPS Appraisal Form provides supervisor and employee a place to assess the employee's performance based on accountabilities, goals, and special projects with documentation of progress and 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, the employee updates the status of accountabilities and goals (including any special projects) and workplace learning activities. Review progress and outcomes and confirm or adjust weighting of key accountabilities (or researchers' performance goals) and significant special projects.

NOTE: Accountabilities, 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 employee rate performance using the **Rating** drop-down menu for every Key Accountability (or Performance Goal for research staff) and significant Special Project.

5 Comments

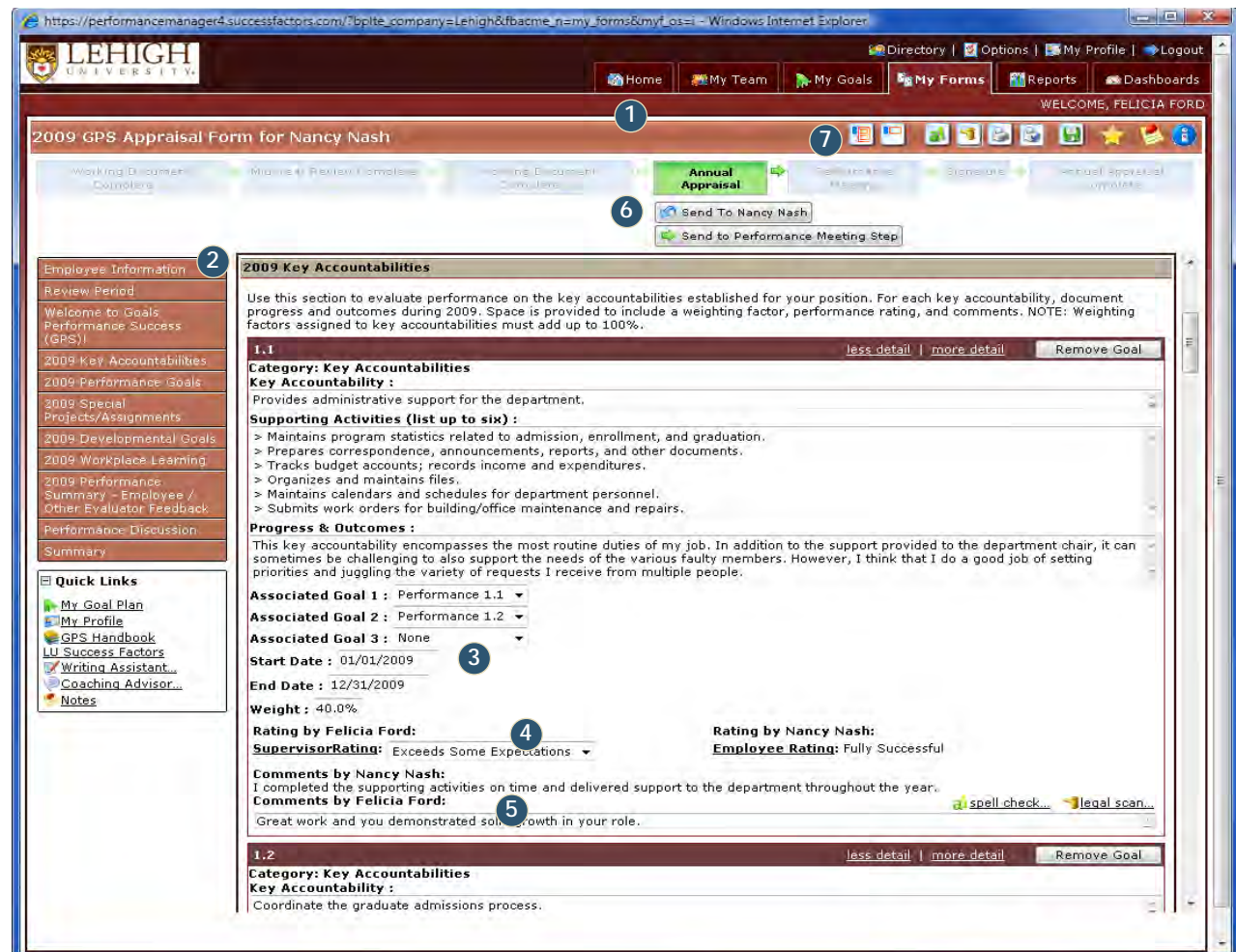
Use the **Comments** field to document your employee's demonstration of performance, areas for improvement, and/or examples to support the ratings provided.

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.

Send - Sends the form to the next step.

Route - Routes the form between employee and 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 and updates to the entire form.

Form History - Searches for other forms relating to the employee.

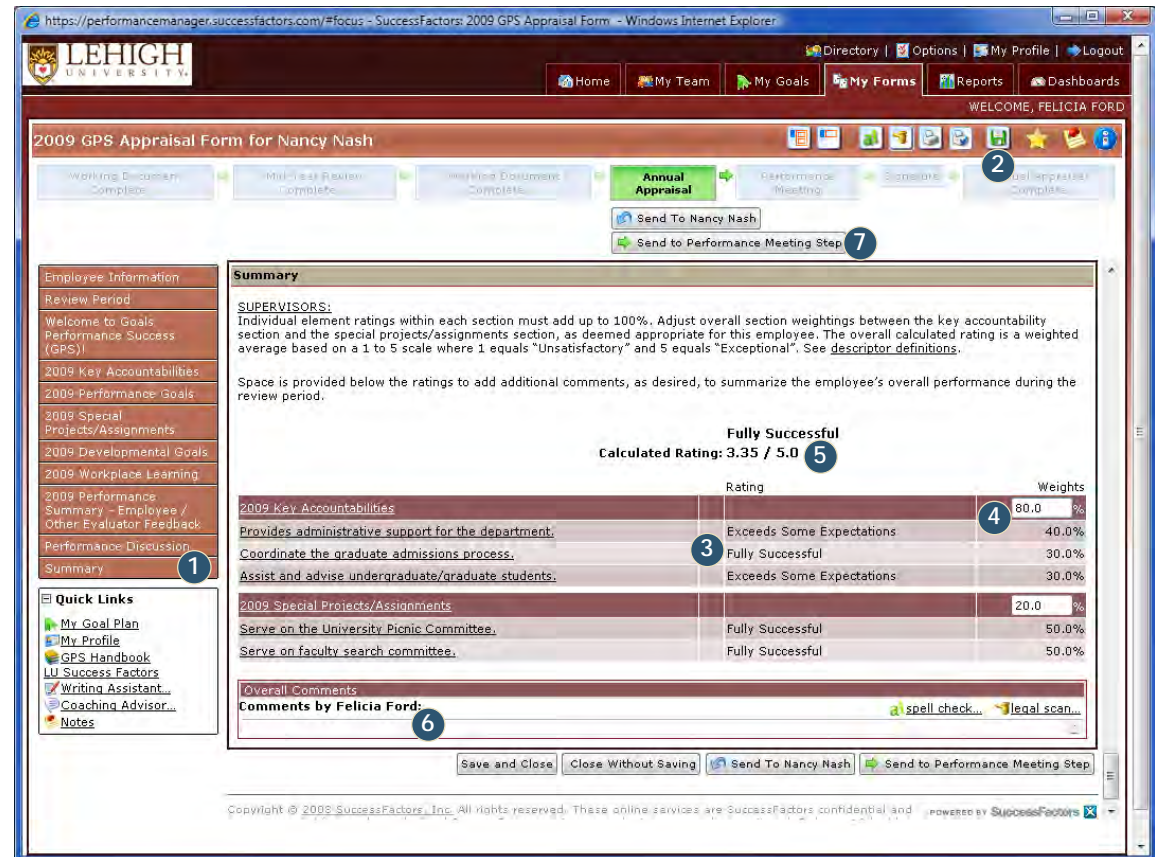
Notes - Creates notes to document particular issues or events relating to the employee.

Audit Trail - Displays audit trail information related to the form.

Performance Review Form – Supervisor Summary Section

After completing the review of each section, finalize the review by following the actions below:

- 1 Select the **Summary** section. This section summarizes your ratings regarding the employee's overall performance during the review period.
- 2 Click the **Save** button to update the summary ratings displayed on the form.
- 3 Ratings are listed for each individual accountability (or researcher's Performance Goal) and Special Project.
- 4 Weights applied to each section are listed for each accountability (or researcher's Performance Goal) and Special Project. Adjust the section weights to give the appropriate emphasis for accountabilities vs. special projects.
- 5 The **Overall Performance Rating** is calculated as the weighted average of the individual ratings, factored by the weighting of each section.
- 6 Use the **Overall Comments** text box to include factual comments supporting the overall rating.
- 7 After the performance discussion with the employee, forward the form to the employee. To complete the review, click the **Send to Performance Meeting Step** button to route the form to the employee for review and signature.



2009 GPS Appraisal Form for Nancy Nash

Annual Appraisal

Send To Nancy Nash

Send to Performance Meeting Step

Summary

SUPERVISORS:
Individual element ratings within each section must add up to 100%. Adjust overall section weightings between the key accountability section and the special projects/assignments section, as deemed appropriate for this employee. The overall calculated rating is a weighted average based on a 1 to 5 scale where 1 equals "Unsatisfactory" and 5 equals "Exceptional". See [descriptor definitions](#).

Space is provided below the ratings to add additional comments, as desired, to summarize the employee's overall performance during the review period.

Fully Successful
Calculated Rating: 3.35 / 5.0

2009 Key Accountabilities	Rating	Weights
Provides administrative support for the department.	Exceeds Some Expectations	40.0%
Coordinate the graduate admissions process.	Fully Successful	30.0%
Assist and advise undergraduate/graduate students.	Exceeds Some Expectations	30.0%
2009 Special Projects/Assignments		20.0%
Serve on the University Picnic Committee.	Fully Successful	50.0%
Serve on faculty search committee.	Fully Successful	50.0%

Overall Comments
Comments by Felicia Ford:

Save and Close Close Without Saving Send To Nancy Nash Send to Performance Meeting Step

Workflow Performance Review Process Steps

The employee 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**
Employee and supervisor use the form to collaborate and track progress. During this step, both employee and supervisor access the form in their GPS Inbox. When ready, the supervisor sends the form to the next step.
- Mid-Year Review**
Employee 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 employee 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 employee 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 employee's form, adds comments, and enters ratings creating an overall performance rating.
- Performance Meeting**
During this collaborative step, supervisor and employee 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 employee 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 employee's Completed folder in the My Forms tab.