PERFORMANCE PRO NAVIGATION INSTRUCTIONS
EMPLOYEE SELF-EVALUATION

These step-by-step instructions are for employees in the Comprehensive Cancer Center to provide guidance in navigating Performance Pro to complete their self-evaluation, as well as setting and evaluating goals, as part of the annual performance review process.

To navigate the Performance Pro system, follow the step-by-step instructions in this document to complete and submit your self-evaluation.

COMPLETING A PERFORMANCE REVIEW

1. A performance review in Performance Pro can be completed in five (5) easy steps:
2. Evaluate Organizational Values
   a. Evaluate each Sub-Organizational Values
3. Evaluate Goals
4. Set Future Goals
5. Add Summary Comments
6. Mark Ready

PERFORMANCE REVIEW PROCESS WITH A SELF-EVALUATION

LOGGING IN TO PERFORMANCE PRO

To login to the Performance Pro system, you must use your OSU Username (not your OSUMC Username). Your OSU Username/ID is your <u>lastname.number</u> (example: smith.900). To access the system follow the links below using your OSU username. <u>It is very important that this pathway is followed exactly as shown</u>.

1. FIRST LINK: Correct link (which will then redirect): <u>First Link to Performance Pro</u>. It is important to use this link first and let it redirect you to the second link as shown below.

2. SECOND LINK: The next link will be a redirected link as mentioned**.** Click on the blue web address. If the link below is the only link that is used, it will take you to the OSU login page which, in turn, will take you to the Performance Pro login page that will require your username and a Performance Pro password.

Redirect Notice

The link you have followed has requested to redirect you to https://webauth.service.ohio-state.edu/cgi-bin/hrperfsolutions.cgi

If you do not want to continue, please close this tab.

Proceed to webauth.service.ohio-state.edu

Your Performance Pro homepage will appear after you are logged in (partial screenshot on next page). Go to the menu on the far-left side and click on the arrow beside of "Performance Reviews" to expand the sub-menu.

Complete the employee self-evaluation sections in the order listed in the drop-down menu:

1. Evaluate Organizational Values*
2. Evaluate Goals (if goals were established last year)
3. Summary Comments
4. Finish Performance Review

Evaluate Organization Values – Within this section, there will be anywhere from three (3) to five (5) overall Organizational Values. The first three values listed below are the primary values the Comprehensive Cancer Center has determined to be applicable to all employees. Certain areas may contain additional values similar to "d" and "e" values below.

a. Excellence
b. Integrity, Transparency and Trust
c. Diversity in People and of Ideas
d. Collaboration and Multidisciplinary Endeavor
e. Innovation

If you use the Evaluation tab to complete the self-evaluation of values, the first organizational value on the list will appear in a drop-down menu (red box in this example).

For each organizational value, there will be "sub-organizational values" that are hidden except for the first one. To expand the sub-values into view, click on the three (3) very small gray lines under the first excellence sub-value (see red arrow). You will need to expand the sub-values for each of the main organizational values.

Once you click on the small gray 3-line radio button, additional sub-organizational values will appear which will need to be rated. Below is a partial screenshot of the additional values that appeared once the button above was clicked.

Sub-Organizational Values

Calculated score is set to 0

Excellence:	Understands and can thoroughly perform job requirements and responsibilities.	(Not Rated)
Excellence:	Seeks new challenges and increased responsibilities.	(Not Rated)
Excellence:	Performs experiments, computations, or theoretical investigations accurately and thoroughly.	(Not Rated)
Excellence:	Maintains thorough and accurate experimental records so that experiments may be repeated by a reviewer.	(Not Rated)
Excellence:	Completes experiments on time following the research protocols to get the desired results.	(Not Rated)
Excellence:	Assists with data collection and completing necessary reports/grant documentation within the required timeframes to prepare materials for reports/grants to be written by the PI for maintaining and growing current research funding.	(Not Rated)
Excellence:	Effectively participates in the preparation of research papers and manuscripts for publication and presentation.	(Not Rated)
Excellence:	Effectively participates in research meetings about progress of project(s).	(Not Rated)
Excellence:	Maintains all equipment, shared or individual, in proper working conditions and reports problems promptly.	(Not Rated)

Once you complete the self-evaluation of values, click on the next section – "Evaluate Goals." There are three tabs for Evaluate Goals – Overview, Evaluation and Set Future Goals. As with the Organizational Values, you can either click on the Evaluation tab to evaluate the progress of established goals or click on each one individually on the Overview page. If the Evaluation tab is used, each goal will be listed in the drop-down menu similar to the values. Also note that you can create new future goals by clicking on the "Set Future Goals" tab that will be evaluated in the next review period.

In the light blue box, the specific actions needed to complete the goal in addition to the expected date of completion are described. Consider this information to rate your progress. The range of ratings for goals is 1 (Not Addressed) to 5 (Exceeded). More details related to the description of the rating is provided under Explanation of Ratings text box.

At the bottom of the page for each goal, there is a comment box for the employee and a "Goal Progress" box. For each goal, comments should be included from the employee and the status of the progress in meeting that goal needs to be marked.

The next section under "Performance Reviews" is Summary Comments. While comments are not required by the employee, they are encouraged to be included. Notice on the right-hand side of this page it provides information at a glance such the overall progress of the review document being completed, progress on rating organizational values, rating goals, employee position and the current review period being rated. There are also two (2) darker blue boxes that are links to PDF documents which allows the current performance review document to be reviewed and to review the employee's self-evaluation only.

The next section to be completed is the final section in the self-evaluation performance review process. Once the employee's comments have been entered in Summary Comments, return to the left-hand side of the page and click on "Finish Performance Review". It will open to the "Ready" tab. If all values and goals have been rated and appropriate comments added, the ready tab will appear like the example shown below:

As an employee, once a Performance Review is marked "Ready", the review document will become a read-only finalized document and will be unavailable for edits.

Alternatively, if the ratings for the sub-values have not been entered, the page will appear as shown below. This list reflects items (mostly values) in the evaluation that have not been completed. One interesting thing to bring to your attention is that the number of required items that are listed but not completed corresponds to the number of sub-values that were not rated.

The highlighted box above serves as a checklist to identify if there are any areas that are not completed. On this example, the "X" means that the ratings have not been completed nor has any comments been entered

If all areas have been completed, then the "Ready" tab under Finish Performance review, will reflect if the employee and/or appraiser have marked the review as "Ready" (refer to the box outlined in red). Within the green box, the "Mark Ready" button will appear and the employee will need to click on that box. As a reminder, once the employee send the review document to the "Ready" phase, the review document will become a read-only finalized document and will be unavailable for edits.

The final two steps will be for the employee and the appraiser to meet to discuss the evaluation and then e-sign. Once that occurs, the system will generate a notice that will appear on the employee's and appraiser's home page. Because the e-signature is required, the notice will appear under the heading "Required". Click on the arrow to open this field and then click on the e-signature link. It will open up the document at the signature section. Both the employee and the appraiser will just need to click on the "E-Sign" link and the signature will be generated. Your review is now complete!!