




LOYOLA

UNIVERSITY MARYLAND

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**MORE THAN READY.
LOYOLA READY.**



Loyola's Annual Performance Evaluation Process For Supervisors

Loyola Human Resources Department
2024



What Is Performance Management?

- Process of creating a work environment in which people can perform to the best of their abilities
- Aligns employee contributions with goals and values of the institution
- Ongoing process
- Employees should play a major role in their own planning and development



The Annual Evaluation Process

- The Employee completes the required self-evaluation
- The Supervisor prepares an evaluation
- The second level Supervisor approves the evaluation
- HR calibration period
- The Supervisor meets with the Employee and discusses the evaluation, and Supervisor adds any final comments
- The Employee adds comments and signs-off
- The Supervisor signs-off

Time Period Covered

- The review should cover any achievements from **March 1, 2023, through February 29, 2024.**





Evaluation Timeline

- Submit self-evaluation by **February 23, 2024**
- Supervisor write the evaluation by **March 15, 2024**
- Second Level reviews by **March 29, 2024**
- HR Calibration Review ends **April 12, 2024**
- Supervisor and employee meet to review evaluation, and sign off on the evaluation by **May 10, 2024**
- Evaluation is completed



Supervisor's Role

- Schedule appraisal meeting in advance
- Meetings to review the evaluation should be done by **May 10, 2024**
- Evaluations should be signed off on by employee and supervisor by **May 10, 2024**
- Review job description to ensure continued accuracy
- Review employee goals
- Determine employee's strengths and development needs



New Employees & Provisional

- Employees hired on or after March 1, 2023, are included in the provisional evaluation process and therefore do not require an annual evaluation.

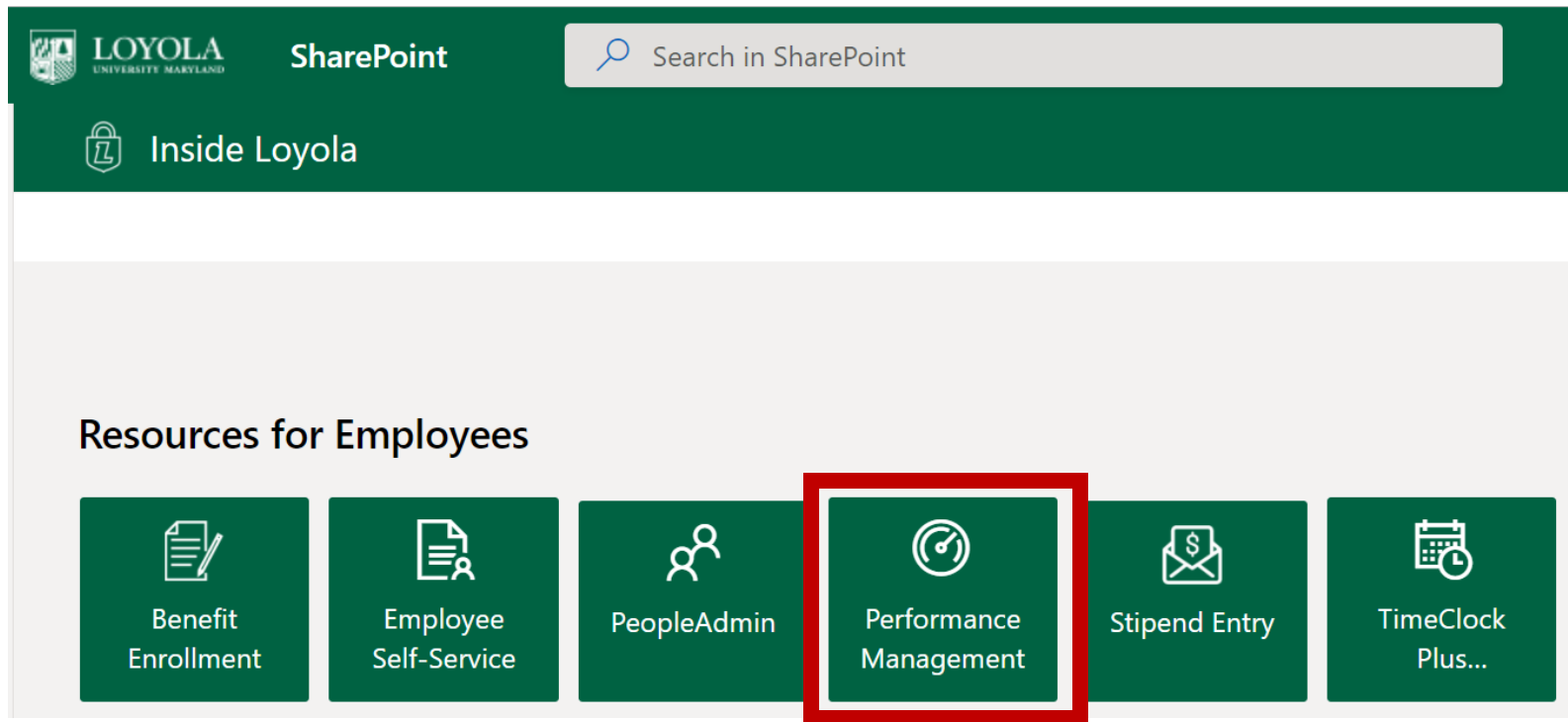


Rating Scale of 1 to 5

- **1 - NEEDS IMPROVEMENT:** Consistently falls short of performance standards.
- **2 - BELOW EXPECTATIONS:** Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results.
- **3 - MEETS EXPECTATIONS :** Meets all relevant performance standards. Occasionally exceeds desired results or objectives in one or more areas.
- **4 - EXCEEDS EXPECTATIONS:** Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills.
- **5 - EXCEPTIONAL:** Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work.

Accessing Loyola's Performance Management System

- Inside Loyola Homepage



The screenshot displays the SharePoint interface for Loyola University Maryland. At the top, there is a dark green header with the Loyola University Maryland logo, the text "SharePoint", and a search bar labeled "Search in SharePoint". Below the header, a navigation bar contains a lock icon and the text "Inside Loyola". The main content area features a section titled "Resources for Employees" with six green buttons: "Benefit Enrollment", "Employee Self-Service", "PeopleAdmin", "Performance Management", "Stipend Entry", and "TimeClock Plus...". The "Performance Management" button is highlighted with a red border.

Complete the Evaluation:

The screenshot shows the Loyola University Maryland internal portal dashboard. At the top, there is a navigation bar with a home icon, the Loyola University Maryland logo, and the text 'LOYOLA UNIVERSITY MARYLAND'. Below the navigation bar, the main content area is divided into several sections:


- Tasks (4) | All Tasks:** A section highlighted with a red box and a red arrow. It contains four tasks, each with a 'Due in 3 days' label and a 'Not ready' status. The tasks are:
 - Complete appraisals for your direct reports (4 To-Dos)
 - Supervisor Meets with Employee & Adds Final Comments
 - Employee signature
 - Supervisor signature
- Shortcuts:** A section with four shortcuts: 'View Reports', 'View My Employees', 'Search for Talent', and 'View Reports'.
- Learning:** A section with a 'Job Aid' card titled '03 - Performance quick reference guide for managers' and a 'Launch' button.
- Share:** A section with a 'Do you have feedback to share?' prompt.
- Connections:** A section with a search bar 'Find colleagues in your organization' and a list of team members: 'Jane Secondlevel' and 'Jason Employee'.
- Bookmarks:** A section with a bookmark titled 'Human Resources Website'.
- Goals:** A section with a '+ Create a new goal' button and a 'Learn more' link. Below it is an 'All Goals' button.
- Development Plans:** A section with a '+ Create a new development plan' button and a 'Learn more' link. Below it is an 'All Development Plans' button.

Complete the Evaluation

Print Spelling Check Language Employee Records Appraisals Save Changes Complete

Form Navigator

- 2022-2023 Annual Non-Supervisor Performance Evaluation Procedures
- DEFINITION OF RATINGS
- Loyola Mission, Vision, and Values
- Job Description
 - Job Duties
- Job Description Comments
- Strategic and/or Operational Goals
- Core Competencies
 - Core Competencies
 - Cross-Cultural Sensitivity
 - Productivity/Quality
 - Dependability
 - Relationship Building / Customer Focus
 - Communication
 - Initiative
 - Analytical Thinking
- Competencies Comments
- New Strategic and/or Operational Goals
- Professional/Service Development Plan
- Overall Score
- Comments

**LOYOLA**
UNIVERSITY MARYLAND

2022-2023 Annual Non-Supervisor Performance Evaluation Form

Employee Name: Bonnie Wrzosek **Title:** Human Resources Partner

Department: Human Resources **Supervisor:** Georgeann Burton

This evaluation covers the period of March 1st of the previous year to February 28th of the current year.

Loyola University Maryland's Performance Evaluation Form is designed to link employee performance to Loyola's mission and values as reflected in the Jesuit tradition and to provide guidance and consistency to the evaluation process. It assists the supervisor in making decisions about employee development, merit increases, promotions and continuing employment. It should be used to summarize and evaluate the employee's overall performance for the past year, to establish results to be achieved for specific tasks or projects for the next year, and to identify professional development goals to enable the employee to enhance performance in the current position or to prepare them for future growth.

Procedures

1. The employee completes a self-evaluation (unless that requirement is waived by the supervisor).
2. The supervisor prepares a written evaluation for the employee.
3. The second level supervisor approves the evaluation.
4. Human Resources reviews evaluations and completes the calibration process.
5. The supervisor discusses the evaluation with the employee and adds final comments.
6. The employee adds comments and signs-off. The supervisor signs-off.

Review Loyola Mission, Vision, and Values

Loyola Mission, Vision, and Values

Our Mission:

Loyola University is a Jesuit Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideal of liberal education and development of the whole person. Accordingly, the University will inspire students to learn, lead and serve in a diverse and changing world.

Our Vision:

Loyola University Maryland, anchored in Baltimore, will be a leading national liberal arts University in the Jesuit, Catholic Tradition.

Academic excellence – promotes a love for learning, discovery, and integration across a wide range of disciplines and interests.

Focus on the whole person – honors, cares for, and educates the whole person by encouraging constituents to strive after intellectual, physical, psychological, social and spiritual health and well-being.

Integrity and Honesty – integrity and honesty that is manifested in an atmosphere of open, civil discourse and careful, respectful listening where freedom of thought and expression are valued and protected.

Diversity – encourages openness to new discoveries, ideas, methods, and perspectives and actively encourage and celebrate diversity in all forms.

Community – strives to define goals and values clearly so as to ensure unity of purpose and to encourage shared ownership for the University's mission and vision.

Justice – strives to foster global awareness, as well as a sense of solidarity with and care for all who struggle for justice. In particular, the University strives to foster awareness and understanding of first-world privilege, and of its attendant responsibilities for leadership and for advocacy of social and structural change.

Service – offers to all community members a rich variety of opportunities for solidarity and service both within and beyond the institution.

Leadership – identifies, develops, encourages, and rewards the exercise of gifts of leadership in all community members in all areas of their lives.

Discernment – encourages the practice of regular reflection and self-examination which foster awareness of the personal freedom (or lack thereof), a sense of personal responsibility for choices and actions, and a balance between enlightened self-interest and promotion of the common "greater" good.

Constant Challenge to Improve – strives for improvement on an ongoing basis by holding out an ideal of personal wholeness and integration as the ultimate horizon of growth, while simultaneously recognizing that development and growth require time and sustained effort. The University seeks to encourage its constituent members to think creatively and to challenge the status quo when appropriate. Loyola also seeks to foster habits of learning, inquiry, and personal and corporate self-examination that encourage ongoing growth and change in its members.

Please provide specific examples of how Loyola's Institutional values were exhibited in the work setting. Discuss strengths and opportunities for improvement. The employee should provide a self-assessment, indicating how they have given expression to Loyola's mission through their work. [Please refer the Loyola Mission webpage for full definitions of the Values.](#)

Comments





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MORE THAN READY. LOYOLA READY.



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Review and rate general job duties

Job Description

Score: / 5.0 (30%)

Job Duties

Please rate the employee's job responsibilities for the review period. These should include the major responsibilities from the employee's position description and may occasionally include other responsibilities.

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement



Job Description Comments







Provide strengths and/or areas for improvement. Provide specific examples for a score graded above or below a "Meets Expectations" score. Include other comments as appropriate.



Job Description Comments



Review and Rate Goals

Score: / 5.0 (50%)

Goals/Performance Standards	Results Achieved	Score	Weight
<p> </p> <p>Title: <input type="text" value="Advertise monthly sales on campus"/></p> <p><input type="text" value="Create flyers and post in all buildings each month."/></p> <p>Rating: <input type="text" value="Below Expectations"/> </p>	<input type="text" value="Only completed this goal quarterly."/>	<input type="text" value="2.0"/> /5.0	<input type="text" value="50"/> %
Goals/Performance Standards	Results Achieved	Score	Weight
<p> </p> <p>Title: <input type="text" value="Organize inventory"/></p> <p><input type="text" value="Organize bookstore inventory, sort and distribute textbooks, monitor supplies, and order textbooks before semester starts."/></p> <p>Rating: <input type="text" value="Exceeds Expectations"/> </p>	<input type="text" value="Created new excel spreadsheet to document weekly and monthly supply totals."/>	<input type="text" value="4.0"/> /5.0	<input type="text" value="50"/> %

[Add Past Goal](#)  

Core Competencies

Core Competencies		Score: <input type="text"/> / 5.0 (15%)					
Competency	Rating						
	5	4	3	2	1	N/A	
<p>Cross-Cultural Sensitivity Demonstrates an awareness of, and sensitivity to, the needs and concerns of individuals from different cultures. Makes adjustments in how he or she communicates out of respect for cultural differences and minimizes the number of cross-cultural misunderstandings. This is quite different from those individuals who invest little or no time attempting to understand cultural differences and whose efforts to communicate across cultures often leads to misunderstandings.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<p>Productivity/Quality Has established a track record of producing work that is highly accurate, that meets or exceeds productivity standards that have been established for his/her organizational level or position. Demonstrates attention to detail and reflects well on the organization. Has successfully combined skills, ability and effort level to ensure that expectations related to results/output are achieved. Is personally committed to high quality work and encourages others to have similar standards. This differs from those who cannot be relied upon to produce high quality work, pay little attention to detail, show little pride in a job well done and/or set a poor example for co-workers. These individuals fail to meet standards due to a shortfall in essential skills, ability or the level of energy/effort required.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<p>Dependability Makes and fulfills commitments. Has established a pattern of working independently, meeting reasonable deadlines, and accepting responsibility for his or her actions. Willingly makes promises and fully intends to keep them. Arrives at work on time and ready to contribute. Shows up for meetings well-prepared. This contrasts with individuals who have proven to be unreliable when others have counted on them to show up on time, meet deadlines and expectations, or arrive prepared and ready to contribute.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<p>Relationship Building / Customer Focus Builds rapport and develops alliances with a broad range of people. Demonstrates customers are a high priority. Adjusts communication style to meet the needs of individuals and clients at various organizational levels and responds to them in a timely and effective manner. Forms alliances by demonstrating concern and respect for others, as well as by highlighting common interests and aspirations. Leaves others feeling that he/she will be a trusted ally and is careful to act in ways that reinforce that trust over time. Anticipates and prevents delays or other things that can adversely affect the customer. Keeps customers informed about the status of pending actions and inquiries about customer satisfaction with products or services. This is in contrast with the behavior of individuals</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Core competencies continued

<p>Communication Communicates effectively and appropriately. Uses good judgment as to what to communicate to whom as well as the best way to get that accomplished. Speaks in a clear and credible manner, selecting the right tone for the situation and audience. Listens to others and allows them to make their point. This is quite different than those who tend to select the wrong means of communicating, or who communicate information to inappropriate people. It also contrasts with those whose messages are not clear or lack credibility, as well as those who demonstrate poor listening skills and are unreceptive to feedback.</p>	○	○	○	○	○	○
<p>Initiative Recognizes opportunities and initiates actions to capitalize on them. Looks for new and productive ways to make an impact. Demonstrates this characteristic when it comes to generating new ideas or processes, capitalizing on new business opportunities, seeking out and taking on increasing responsibility or resolving problems as they occur. Uses sound judgment about when to take action and when to seek guidance or permission. This is in contrast to those who fail to notice opportunities, wait to be asked or instructed before taking action, seldom offer new ideas or express reservations about taking on additional responsibilities.</p>	○	○	○	○	○	○
<p>Analytical Thinking Breaks down problems and issues into sub-components and then assesses the costs, benefits and risks of various options prior to selecting a particular approach. This contrasts with the behavior of individuals who tend to attack problems without a thorough examination of all important components and ramifications; who fail to weigh the costs, benefits and risks associated with various alternatives; and/or who are unable to explain or justify their decisions in a logical and systematic fashion.</p>	○	○	○	○	○	○



Competencies Comments

Provide strengths and/or areas for improvement. Provide specific examples for all competencies graded above or below a "Meets Expectations" score. Include other comments as appropriate.

Competencies Comments



New Strategic and Operational Goals

New Strategic and/or Operational Goals

Identify a minimum of two new goals. These goals must be those the employee agreed to accomplish over the coming year.

Goals are specific assignments to participate in or manage ongoing or future projects. When setting project oriented goals, outline the scope of the role the employee is to play, lists resources and completion time frame and define the desired result.

Enter additional goals by clicking on the "Add New" button.

Goals	Weight
	
Self: N/A	
Title:	<input type="text"/> %
<input type="text"/>	
	
Self: N/A	
Title:	<input type="text"/> %
<input type="text"/>	



Professional/Service Development Plan

Professional/Service Development Plan

Supervisors and employees should use this section to plan for activities that:

- develop professional skills and competencies
- allow for participation in service and mission related programs
- address career development goals and aspirations

Please refer to the [Mission and Community Service Leave policy](#) for ideas on how to incorporate these activities into the annual planning.

Professional/Service Development Plan



Title:

 [Add Development Plan](#)



Review Overall Score and Comments

Overall Score

Score: / 5.0 (100%)

The level of overall performance.

Comments

This section is for optional employee comments.

Supervisor Overall Comments:



Employee Overall Comments:

Submitting the Evaluation:

Complete appraisals for your direct reports

Help

Jason Employee

Next Employee ▶

Supervisor Training 2018
By James Manager

Form Navigator

Annual Performance Evaluation Form
Procedures

General Job Description
Performance Levels

KNOWLEDGE OF JOB

Uses equipment/tools/machinery
Applies knowledge of trade tech
Determines the procedures required

PRODUCTIVITY/QUALITY

Completes assigned tasks in a timely manner
Organizes assignments well
Makes effective use of time and resources
Has necessary tools and supplies
Completes assignments to departmental standards

DEPENDABILITY

Meets attendance standards
Meets punctuality standards
Complies with departmental/University policies

INITIATIVE

Suggests ways to improve operations
Willingly accepts new assignments
Adapts to changes in procedure
Reports problems and special circumstances
Takes action in the absence of supervisor

SAFETY

Complies with department/University safety policies
Is concerned with the safety of self and others
Wears appropriate attire for work

INTERPERSONAL SKILLS

Cooperates with others to achieve goals
Interacts with others with tact and respect
Accepts constructive criticism and feedback
Demonstrates commitment to Loyola University
Equipment and Supplies
Properly cares for and maintains



Save

Send for Review...

Complete

Competency	5	4	3	2	1	N/A	
Properly cares for and maintains equipment/tools/machinery as well as work areas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)
Maintains adequate inventory of supplies	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)
Avoids waste and misuse of supplies	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)
Arrives to work in full uniform	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)

ADD PLANNED SKILL DEVELOPMENT

Lead Person	5	4	3	2	1	N/A	Rating	Weight
Competency								
Effectively communicates	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)	
Assists employees	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)	
Maintains performance	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)	
Distributes workload equitably	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)	
Effectively manages and rates the performance of others	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	(0%)	

Message from webpage

Once you complete the step, you will not be able to modify the section(s) you are currently editing. Click OK to save or click Cancel to return to the form.

OK Cancel



Complete appraisals for your direct reports

Help 

Jason Employee

Supervisor Training 2018
By James Manager

Next Employee ▶

Form Navigator



Annual Performance Evaluation Form Procedures

General Job Description

Performance Levels

KNOWLEDGE OF JOB

Uses equipment/tools/machinery

Applies knowledge of trade techniques

Determines the procedures required

PRODUCTIVITY/QUALITY

Completes assigned tasks in a timely manner

Organizes assignments well

Makes effective use of time and resources

Has necessary tools and supplies

Completes assignments to department standards

DEPENDABILITY

Meets attendance standards

Meets punctuality standards

Complies with departmental/University policies

INITIATIVE

Suggests ways to improve operations

Willingly accepts new assignments

Adapts to changes in procedure


Reports problems and special circumstances

Takes action in the absence of supervisor

SAFETY

Complies with department/University safety policies



 Completed



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UNIVERSITY MARYLAND

Annual Performance Evaluation Form

Employee Name: Jason Employee

Title: Account Executive

Department: Sales

Supervisor: James Manager

This evaluation covers the period of April 1st of the previous year to March 31st of the current year.

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Supervisor's Next Steps

- **Be sure to hit “Complete”**
- Hitting complete sends the evaluation to the next level supervisor to review and moves the evaluation process forwards
- “Send for review” will let a third party review the document and send it back to you
- Clicking “Save” will save your notes and let you return at another time to finish



Sending Evaluation to a 3rd Party

A 3rd party review is NOT the second level review by the supervisor's supervisor. A 3rd party review may be used when:

- There is a dotted line reporting relationship to another individual not in the supervisory chain.
- An employee is shared between two departments.
- There is a customer with critical feedback.
- The employee may have transferred during the evaluation period.

Sending the Evaluation to 3rd Party:

The screenshot displays the Loyola University Maryland HR system interface. On the left is a navigation sidebar with the following items: Home, My Performance, All Tasks, **Task Status** (highlighted with a red box), My Employees, Reports, Talent Search, Learning Library, Help, and Contact Us. The main content area shows a task card with two signature fields: 'Employee signature' and 'Supervisor signature', both marked as '1 week overdue'. A red arrow points from the 'Task Status' menu item to the 'Employee signature' field. Below the signature fields are 'Not ready' status indicators and 'Share' and 'Connections' sections. The 'Goals' section on the right indicates 'You don't have any goals right now' and includes a 'Create a new goal' button and a 'Learn more' link. The 'Development Plans' section at the bottom right also indicates 'You don't have any'.

Sending the Evaluation to a 3rd Party:

Tasks Overview

Supervisor Training 2018

1/11/18 Employee Writes Self-Appraisal

1/15/18 Complete appraisals for your direct reports **3 To-Dos**

1/15/18 Third party feedback

1/15/18 Second Level Supervisor Approves Appraisals

1/15/18 Supervisor Meets with Employee & Adds Final Comments **3 Not Ready**

1/15/18 Employee Comments & Sign-Off

1/15/18 Supervisor s **3 Not Re**

Search First and/or Last Name

Appraisal Tasks

Page 1 of 1

<input type="checkbox"/>	First Name	Last Name	Complete appraisals for your direct reports	Appraisal Status	Due Date	Completed Date	Employee Writes...	Modified Date
<input type="checkbox"/>	Jessica	Employee	Edit Appraisal	View Status	1/15/18		Jessica Employee	
<input type="checkbox"/>	Joe	Employee	Edit Appraisal	View Status	1/15/18		Joe Employee	
<input type="checkbox"/>	John	Employee	Edit Appraisal	View Status	1/15/18		John Employee	

Sending the Evaluation to a 3rd Party:

Complete appraisals for your direct reports

Help 

Jessica Employee

Next Employee 

Supervisor Training 2018
By James Manager

Form Navigator



Save

Send for Review...

Complete

Annual Performance Evaluation Form
Procedures
DEFINITION OF RATINGS
Goal Achievement
Core Competencies
Core Competencies
Job Skills
Quality of Work
Productivity
Dependability
Relationship Building / Networking
Communication
Customer Focus
Initiative
Analytical Thinking
Integrity
Cross-Cultural Sensitivity
Overall Score
New Goals
Comments



LOYOLA
UNIVERSITY MARYLAND

Annual Performance Evaluation Form

Employee Name:

Title:

Department:

Supervisor:

This evaluation covers the period of April 1st of the previous year to March 31st of the current year.

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Procedures

1. The employee completes a self-evaluation (unless that requirement is waived by the supervisor).
2. The supervisor prepares an evaluation for the employee.
3. The second level supervisor approves the evaluation.
4. The supervisor discusses the evaluation with the employee and adds final comments.
5. The employee adds comments and signs-off. The supervisor signs-off.

Questions regarding Loyola's performance management process can be addressed to Human Resources at performancereview@loyola.edu or by calling 410-617-2354.

Sending the Evaluation to a 3rd Party:

Complete appraisals for your direct reports Help

Jessica Employee Next Employee ▶

Supervisor Training 2018
By James Manager

Form Navigator Save Send for Review... Complete

Annual Performance Evaluation Form
Procedures
DEFINITION OF RATINGS
Goal Achievement
Core Competencies
Core Competencies
Job Skills
Quality of Work
Productivity
Dependability
Relationship Building / Networking
Communication
Customer Focus
Initiative
Analytical Thinking
Integrity
Cross-Cultural Sensitivity
Overall Score
New Goals
Comments

Send for Review

Select the employee to perform the review.

Last Name:

First Name:

Employee Information:
No Filter = None

Available Employees:
Enter search criteria and click Search
(blank criteria return all results)

Show:
No Additional Information

Questions regarding Loyola's performance management process can be addressed to Human Resources at performancereview@loyola.edu or by calling 410-617-2354.



3rd Party Notes:

- The evaluation can be sent to more than 1 person for feedback, but only 1 person at a time.
- The 3rd party cannot change the scores, only add comments.
- Once the 3rd party saves their comments and clicks complete it will return to the original Supervisor.
- The Supervisor will acknowledge comments, and the Supervisor can change any scores if needed.

3rd Party Notes:

- When the supervisor wants a 3rd party to review, they click the “Third Party Review” button.
- Once it comes back, supervisor can see the notes.
- ***The comments from the 3rd Party are deleted upon completion of the form.***



Check the progress status on the evaluation:



Search First and/or Last Name

Appraisal Tasks

Page 1 of 1

First Name	Last Name	Complete appraisals for your direct reports	Appraisal Status	Modified Date	Due Date	Completed Date	Employee Writes Self-Appraisal
Jason	Employee	Edit Appraisal	View Status	1/25/19	1/15/19		View Self-Appraisal

Check the progress status on the evaluation:

Status for Jason Employee ✕

Step	Status	Due Date	Person Responsible
Employee Writes Self-Appraisal	✔	1/11/19	Jason Employee
Complete appraisals for your direct reports	❗	1/15/19	James Manager
Third party feedback	○	1/15/19	No one assigned
Second Level Supervisor Approves Appraisals	○	1/15/19	Jane Secondlevel
Supervisor Meets with Employee & Adds Final Comments	○	1/15/19	James Manager
Employee Comments & Sign-Off	○	1/15/19	Jason Employee
Supervisor signature	○	1/15/19	James Manager

Close

Legend: ❗ Overdue ○ My To-Do 👤 Their To-Do 📩 Sent for Review ○ Not Ready ✔ Completed



2nd Level Review

- Once completed, the Supervisor sends the form forward using the “Complete” button to the Secondary Supervisor for review and approval.
- Second Level Supervisor approves evaluation by March 15, 2024.



HR Calibration

- After the forms have been submitted to the 2nd level reviewer, the next step for calibration would be held in an HR queue
- HR will conduct analysis on the scores and communicate results to VPs for them to consider. Adjustment, if any, would be made prior to finalizing performance evaluations
- This will look for consistency and fairness in how scores are being distributed before the reviews are finalized

Note: supervisors must commit to completing reviews by the deadline dates to be able to do this.



Next Steps

- Meet with your employee!
- Schedule time
- Quiet space
- Avoid distractions
- Thoroughly review the changes to the form and how they are being rated



Final Steps

- Employee signs off and adds final comments by May 15, 2024
- Supervisor signs off and adds final comments by May 15, 2024
- ****If employee scores below 3.0 work with your Human Resources Partner to create a Performance Improvement Plan.****

After the meeting log back into Halogen and add any comments needed.
This finalizes the evaluation!

The screenshot displays the 'Complete your self-appraisal' interface in Halogen. The user is identified as 'John Employee' for the 'Supervisor Training 2018' evaluation. The 'Form Navigator' on the left lists various sections, with 'Comments' highlighted in a red box. The main content area shows a section for optional employee comments, with 'Supervisor Comments' and 'Employee Comments' fields also highlighted in red boxes. The interface includes a 'Form Navigator' on the left, a 'Save' and 'Complete' button bar at the top right, and a 'Help' link in the top right corner. The 'Comments' section is titled 'This section is for optional employee comments.' and contains two large text input areas. The 'Supervisor Comments' field is located above the 'Employee Comments' field. The 'Form Navigator' lists the following items: Annual Performance Evaluation Form, Procedures, DEFINITION OF RATINGS, Goal Achievement, Core Competencies, Core Competencies, Job Skills, Quality of Work, Productivity, Dependability, Relationship Building / Networking, Communication, Customer Focus, Initiative, Analytical Thinking, Integrity, Cross-Cultural Sensitivity, Overall Score, New Goals, and Comments. The 'Comments' section is currently empty.



Key Dates

- **March 15, 2024** - The Supervisor completes the evaluation and sends to the second level supervisor
- **March 29, 2024** - The second level supervisor reviews and approves the evaluation
- HR Calibration process completed by **April 12, 2024**
- **May 10, 2024**, Supervisor and employee meet to review evaluation, and sign off on the evaluation (final date to sign off May 15, 2024)
- Evaluation is completed!



Questions?

- More information can be found on the Human Resources website, under Compensation – Performance Management
- <https://www.loyola.edu/departments/hr/compensation/performance>
- Contact your HR Partner directly or the HR Office at extension 2354