Colorado Springs Schools

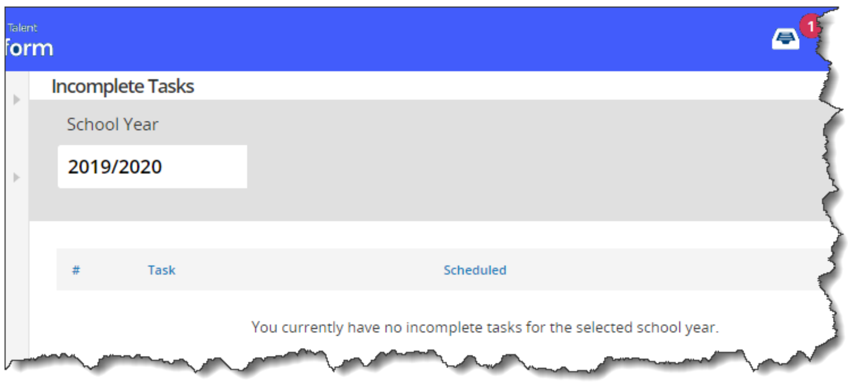
How do Supervisors complete Mid-Year Reviews for Employees?

The purpose of the Mid-Year Review is for you, the supervisor, to engage your employee in a professional conversation focused on furthering your discussions regarding performance, remediation plans, or professional growth plans as appropriate.

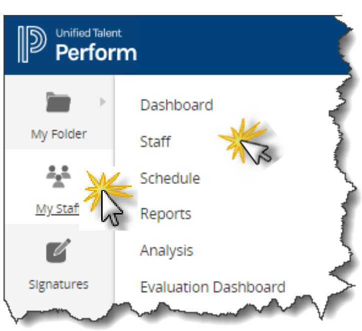
It is expected that this evaluation take place in a face to face conference. In anticipation of this conference you are able to work on the Mid-Year Review form, save your progress, and return at a later time to pick up where you left off. Whether or not you fill out the Mid-Year Review prior to your face to face conference, you must go over the evaluation with the employee before you submit it for their signature. See also HELPFUL HINTS /USEFUL TOOLS AT THE END OF THESE DIRECTIONS.

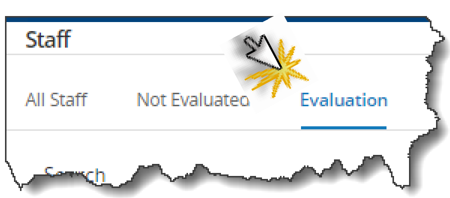
After logging into Perform it will open directly to your incomplete task page.

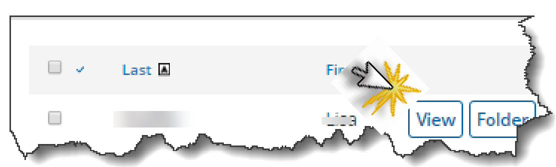
- At this point in the year, you will have completed your Training/Orientation Statement as well as your Professional Growth Plan so they will no longer be listed as incomplete items. This page is **YOUR** personal evaluation "home" page.



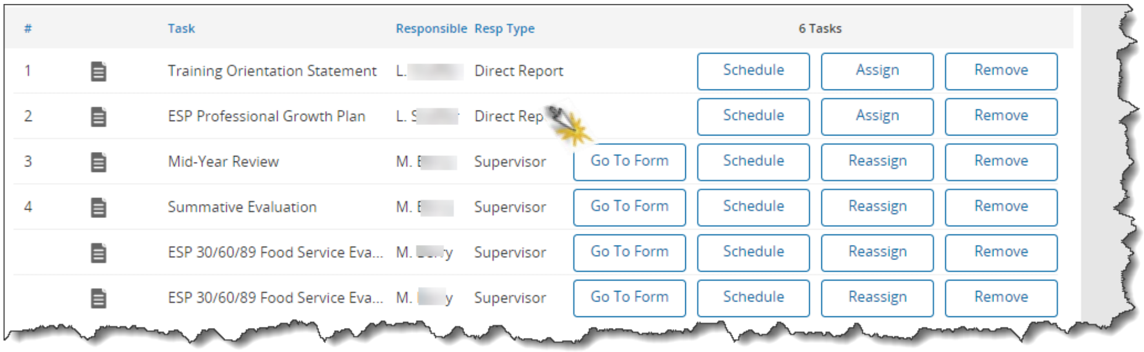
- Click on **MY STAFF** then **STAFF** (This will bring up a list of employees that you are responsible for evaluating)
- Notice tabs at the top of the page. You should be looking at **EVALUATION**.
- Find the **EMPLOYEE'S NAME** from the list.
- Click **VIEW** to the right of the name.





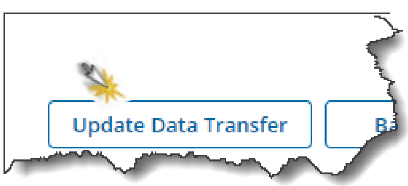


- Click **GO TO FORM** across from the Mid-Year Review title.



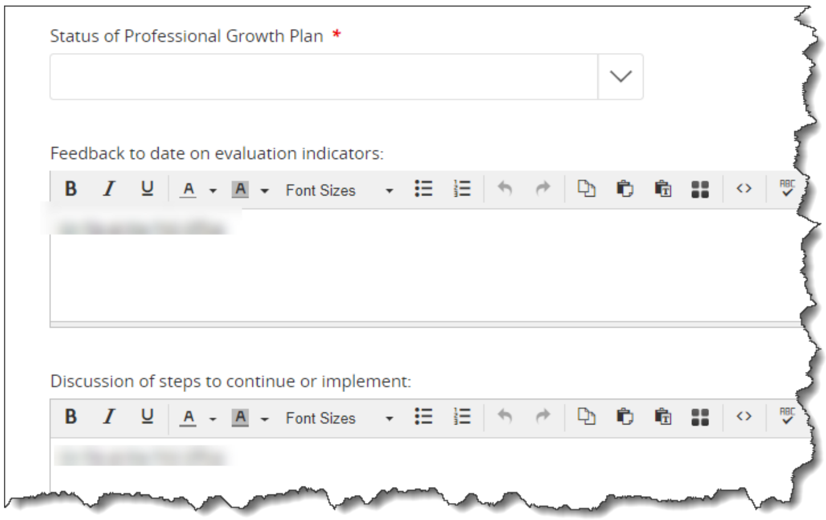
Once the form opens, you will notice the Professional Growth Plan that the employee filled out, has been populated into the required areas. IF for some reason it has not, then you will need to manually prompt the system to do so.

- Scroll to the bottom of the page and click **UPDATE TRANSFER**.



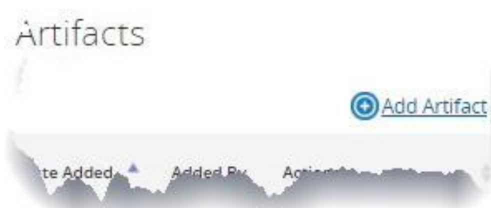
- Click the "**RELOAD THIS PAGE**" button at the top left of your computer screen to refresh the screen.

- Next, choose from the **DROP-DOWN** menu where the employee is in regards to their professional growth plan goals and then enter comments supporting your conference concerning evaluation indicators and discussion of steps to continue or implement.

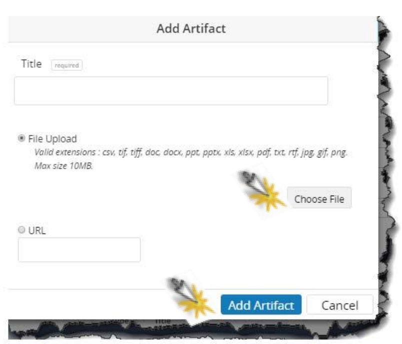


- If you have any certificates of training, Remediation Plans, or other documents that you would like uploaded to the evaluation, you will need to add them to the **ADD ARTIFACT** tab BEFORE SIGNING.

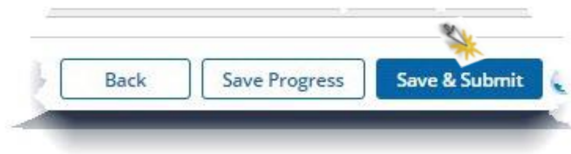
   a. Click on **ADD ARTIFACT**



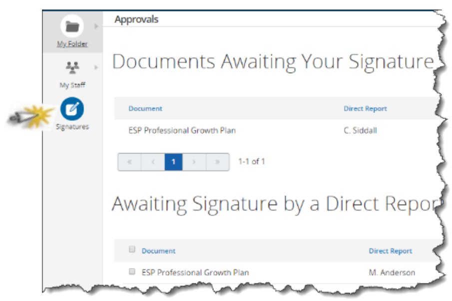
   b. **CHOOSE FILE** to locate the file you would like to upload or enter the URL and click **ADD ARTIFACT**



- At the conclusion of your face to face conference with the employee, you will electronically submit the findings by clicking **SAVE AND SUBMIT**.

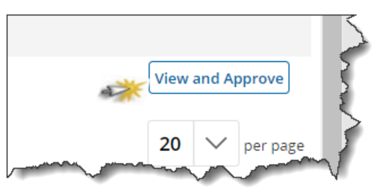


- After saving and submitting the form you will be able to see that this document is now awaiting the signature by the direct report (employee).
    a. Click on the **SIGNATURE ICON** to see any documents awaiting your signature as well as any awaiting your direct reports/Employees.

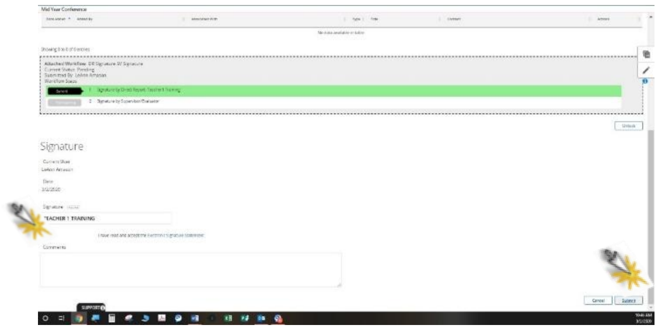


    b. The **employee** will then need to log into Perform and **sign** the form themselves.

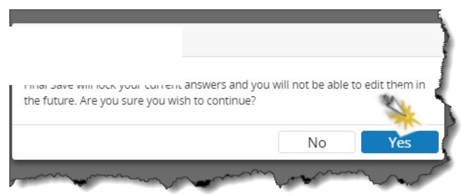
- After the employee has completed their signature, you will retrieve the document to **SUBMIT** your signature by:
    a. Again, click the **SIGNATURE** icon
    b. Locate the Mid-Year Review listed under DOCUMENTS AWAITING YOUR SIGNATURE, and click **VIEW and APPROVE**, to the right.



- Scroll to the bottom and type your name in the **SIGNATURE BOX** then click on the box indicating that you have read and accept the Electronic Signature Statement. Finally click on the submit button on the bottom right.



- Click **YES**



As the last step, please make a copy of the COMPLETED AND SIGNED evaluation to be kept on site.

- The copy should only be printed AFTER all signatures have been captured so you will need to retrieve the document after all of the previous steps.

  - **Follow the directions at the beginning of these instructions to access the evaluation**.
  - Instead of choosing Go to Form you will choose **VIEW** (to view the completed form)
  - When the form opens you will notice a **PRINTER ICON** on the top right of the form
  - **Click** on the icon

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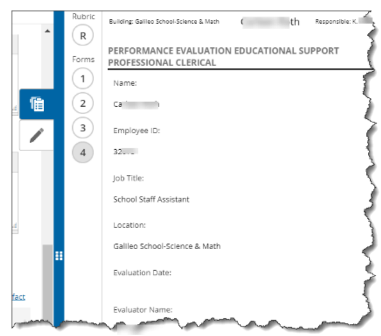
HELPFUL HINTS/USEFUL TOOLS

- You can save your progress at any time by clicking on **SAVE PROGRESS** button at the bottom of the form. You can return and pick up where you left off.

- You have access to every **EVALUATION PREVIOUSLY COMPLETED** for the employee while working in this evaluation.
    - Click on the clipboard icon on the far-right hand side of the page.
    - When the pop out opens, you can click on any of the **NUMBERS** shown.
    - Each number stands for corresponding evaluation.



- You have access to an area within the evaluation to **MAKE NOTES**, even throughout the year to assist you with its completion. (Notes are NOT visible to the employee)
    - Click on the **PENCIL ICON** on the far-right hand side of the page.
    - When the pop out opens, you can make notes, and use the select action drop down to assign a comment to a specific rubric area and other options.
    - After completing the note section click **ADD NOTE.**