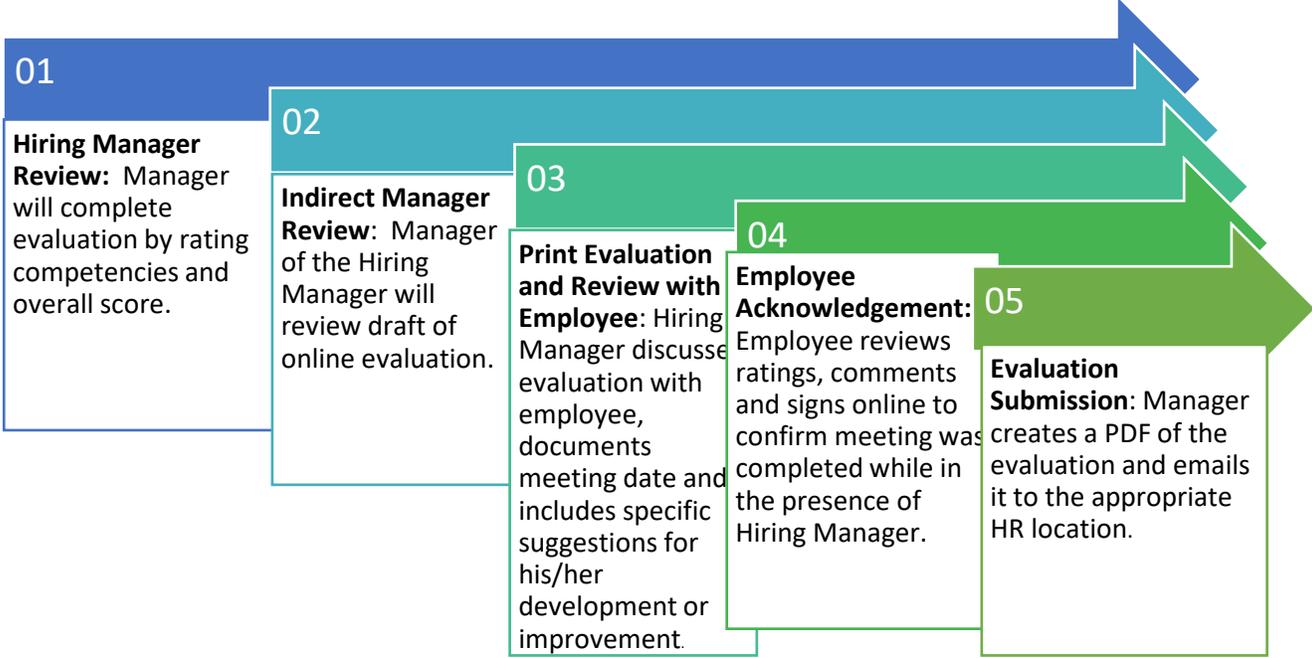


# Classified Employee Evaluation Process



# ACCESSING PERFORMANCE EVALUATIONS IN CORNERSTONE

Emails will be sent to notify you that an evaluation is ready to be completed. Additionally, after each step is completed, an email will be sent to notify the next participant they need to take action on the evaluation.

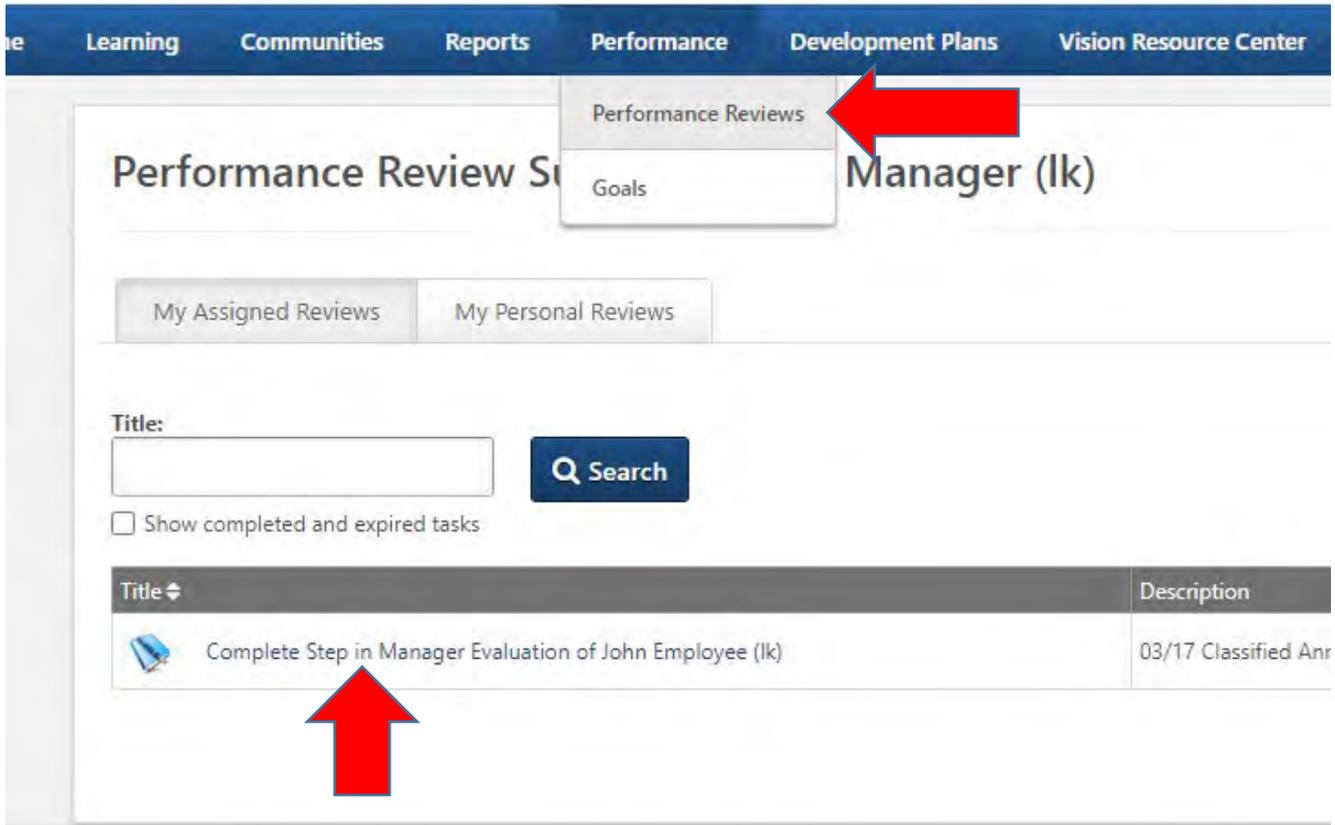
Log in to Insite Portal



Click on **GROW@4CD**



You can access evaluations under the performance review tab. Select the title of the evaluation you would like to work on.

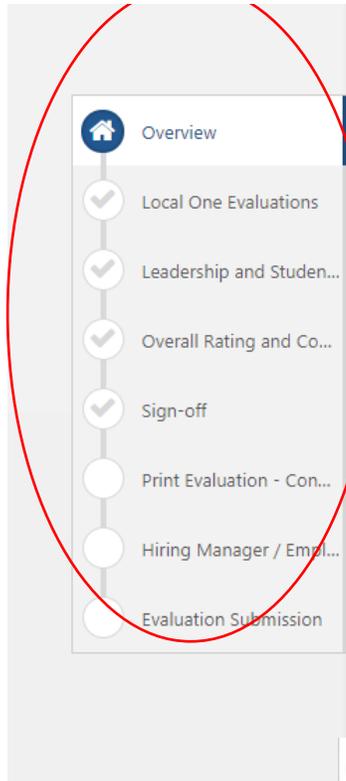


The screenshot shows a navigation bar with tabs: Learning, Communities, Reports, Performance, Development Plans, and Vision Resource Center. A dropdown menu is open under the Performance tab, showing 'Performance Reviews' and 'Goals'. A red arrow points to 'Performance Reviews'. Below the navigation, the page title is 'Performance Review Summary for Manager (Ik)'. There are two tabs: 'My Assigned Reviews' and 'My Personal Reviews'. A search section includes a 'Title:' label, an input field, and a 'Search' button. A checkbox labeled 'Show completed and expired tasks' is present. Below is a table with two columns: 'Title' and 'Description'. A red arrow points to the first row of the table.

Title	Description
 Complete Step in Manager Evaluation of John Employee (Ik)	03/17 Classified Anr

# Key System Features

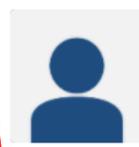
## Evaluation Sections



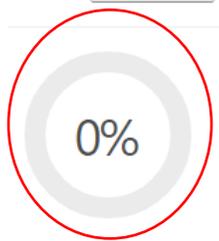
Classified Employee Evaluation  
\_1. 09/29 TEST Classified\_Ter

Your Progress

Options ▾



**Stephanie Morgado**  
Human Resources Generalist  
7/1/2019 - 6/30/2020



Time period employee is being evaluated for.

### Overview

Please refer to the current **Local One Contract**, Article 14 for details on the Classified Evaluation process.

#### Evaluation Steps

The following are the steps involved in completing an online evaluation for Classified Local One employees.

1. **Hiring Manager Review:** Manager will complete evaluation by rating competencies and overall score.
2. **Indirect Manager Review:** Manager of the Hiring Manager will review draft of online evaluation. If evaluation is ready to be approved, go to the end of the sections and sign and submit on the last section. If changes are necessary to the evaluation submitted by Hiring Manager, the Indirect Manager will need to reopen the task.
3. **Hiring Manager/Employee Meeting:** Hiring Manager discusses evaluation with employee and documents meeting date and includes specific suggestions for his/her development or improvement.
4. **Employee Acknowledgement:** Employee reviews ratings, comments and signs online to confirm meeting was completed

### Review Step Progression



Steps/Workflow of the classified evaluation process

Click **Get Started** to begin.



**Get Started**

If, at any point, you need to stop work on the evaluation, make sure to scroll to the bottom of the page and click **Save and Exit** to save your progress. Changes **will not be saved** if you exit without saving or leave your session idle and are logged out automatically. When you return, you can go directly to the section you left by clicking the left hand menu bar.



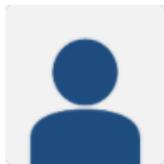
Back Save and Exit **Save and Continue**

## STEP 1. HIRING MANAGER EVALUATION

### A. Evaluate Competencies

Evaluate employee on each of the Competency items using the drop down menu. If Unsatisfactory or Needs Improvement is marked, statement(s) of explanation must be given in the comments section. Supporting documentation can be added under the options drop down. When finished, click **Save and Continue**

Classified Employee Evaluation



**Stephanie Morgado**  
Human Resources Generalist  
7/1/2019 - 6/30/2020

Options ▾

Add Co-Planners

Attachments

Print Review

0%

## Local One Evaluations

The basic goal of the employee evaluation process is to help each employee perform the present job more effectively to the mutual benefit of the individual and the District. The evaluation system for classified employees shall have four primary objectives:

1. To provide a means of evaluating each employee's performance in the specific context of his/her the job
2. To determine individual needs for improvement and development
3. To secure continuing communication of individual development
4. To provide a basis for giving recognition for praiseworthy service

**Hiring Manager:** Evaluate Stephanie Morgado on each of the items below. If Unsatisfactory or Needs Improvement is marked, statement(s) of explanation must be given in the comments section.

**Indirect Manager:** Review ratings and comments for Stephanie Morgado. If updates are necessary, reopen step and discuss with hiring manager. To Re-open this step go back to overview, select Re-Open step and make comments for the hiring manager.

**Employee:** Review ratings and comments provided by your hiring manager.

## 1. Knowledge of work



Knowledge and understanding of all phases of this job and closely-related matters.

- **Outstanding:** Has a thorough knowledge of job.
- **Exceeds Expectations:** Has a sound and reliable knowledge of job.
- **Meets Expectations:** Has a good working knowledge of job.
- **Needs Improvement:** Is not consistent with demonstrating working knowledge of job.
- **Unsatisfactory:** Needs frequent instructions, even on routine jobs.

Select ▼

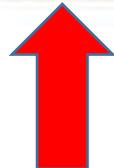


- ✓ Select
- Outstanding
- Exceeds Expectations
- Meets Expectations
- Needs Improvement
- Unsatisfactory

Font Size A A

**Add comments here. Comments are required if marking needs improvement or unsatisfactory.**

Back Save and Exit Save and Continue



## B. Leadership and Student Learning Outcomes

If present job requires leadership and/or student learning outcomes, or if you have an opportunity to, evaluate the employee on Leadership and/or student learning outcomes on the job, appraise characteristics below; otherwise select N/A "Not Applicable." If unsatisfactory or needs improvement is marked, statement(s) of explanation must be made in the comments section below. When finished, click [Save and Continue](#)

### 1. Leadership ▼

Ability to lead and train others and to get results through teamwork. If present job requires leadership, or if you have an opportunity to observe evidence of leadership on the job, appraise leadership characteristic below; otherwise select Not Applicable.

- **Outstanding:** Outstanding leader. Maintains high morale and output.
- **Exceeds Expectations:** Excellent leadership qualities. Supports maintaining the morale and respect of the group is high.
- **Meets Expectations:** Expectations Good on regular assignments. Has respect of group.
- **Needs Improvement:** Needs to achieve satisfactory results from team by actively leading.
- **Unsatisfactory:** Unable to get satisfactory output from subordinates.
- **Not Applicable**

Select ▼ \*

- ✓ Select
- Outstanding
- Exceeds Expectations
- Meets Expectations
- Needs Improvement
- Unsatisfactory
- Not Applicable

### 2. Student Learning Outcomes (SLO) ▼

Assists in using and/or uses the results of the assessment of SLOs to improve teaching and learning. If present job requires student learning outcomes, or if you have an opportunity to observe evidence of student learning outcomes on the job, appraise characteristic below; otherwise select not applicable.

- **Outstanding:** Outstanding leader. Maintains high morale and output.
- **Exceeds Expectations:** Fully effective with all duties and assignments.
- **Meets Expectations:** Good on regular assignments. Has respect of group.
- **Needs Improvement:** Improvement needed with assignments in one or more areas.
- **Unsatisfactory:** Unable to get satisfactory output from subordinates.
- **Not Applicable**

Select ▼ \*

#### Comments:

Rich text editor toolbar with options for Bold (B), Italic (I), Underline (U), Strikethrough (S), Subscript (x<sub>2</sub>), Superscript (x<sup>2</sup>), Text Color (I<sub>x</sub>), Bulleted List, Numbered List, Decrease Indent, Increase Indent, Font, Size, Text Color (A), Background Color (A), Undo, Redo, Cut, Copy, Paste, Table, and Table of Contents.

### C. Overall Rating and Comments

Provide overall rating and comments for employee. When finished, click **Save and Continue**

**Overall Rating**

Select

- Select
- Outstanding
- Exceeds Expectations
- Meets Expectations
- Needs Improvement
- Unsatisfactory

Back Save and Exit Save and Continue

### D. Sign-Off

Hiring Manager's signature confirms the review is complete. When you hit submit, it will move to the indirect manager. **YOU CANNOT MAKE ANY CHANGES ONCE YOU HIT SUBMIT.** An email will be sent to the Indirect Manager, notifying them that they need to take action on the evaluation.

**Sign-off**

**Supervisor's Signature:** Signature confirms you completed the review for Stephanie Morgado. When you hit submit, this will go directly to the Indirect Manager for review.

**Indirect Manager Signature:** Sign to confirm you have reviewed the evaluation for Stephanie Morgado..

**Employee Certification:** I have reviewed this report. In signing it, I do not necessarily agree with the evaluation. I understand that I have the right to add any comments in the space below.

Employee  
Pending Signature

Manager Preparing Evaluation

First and last name **Sign**

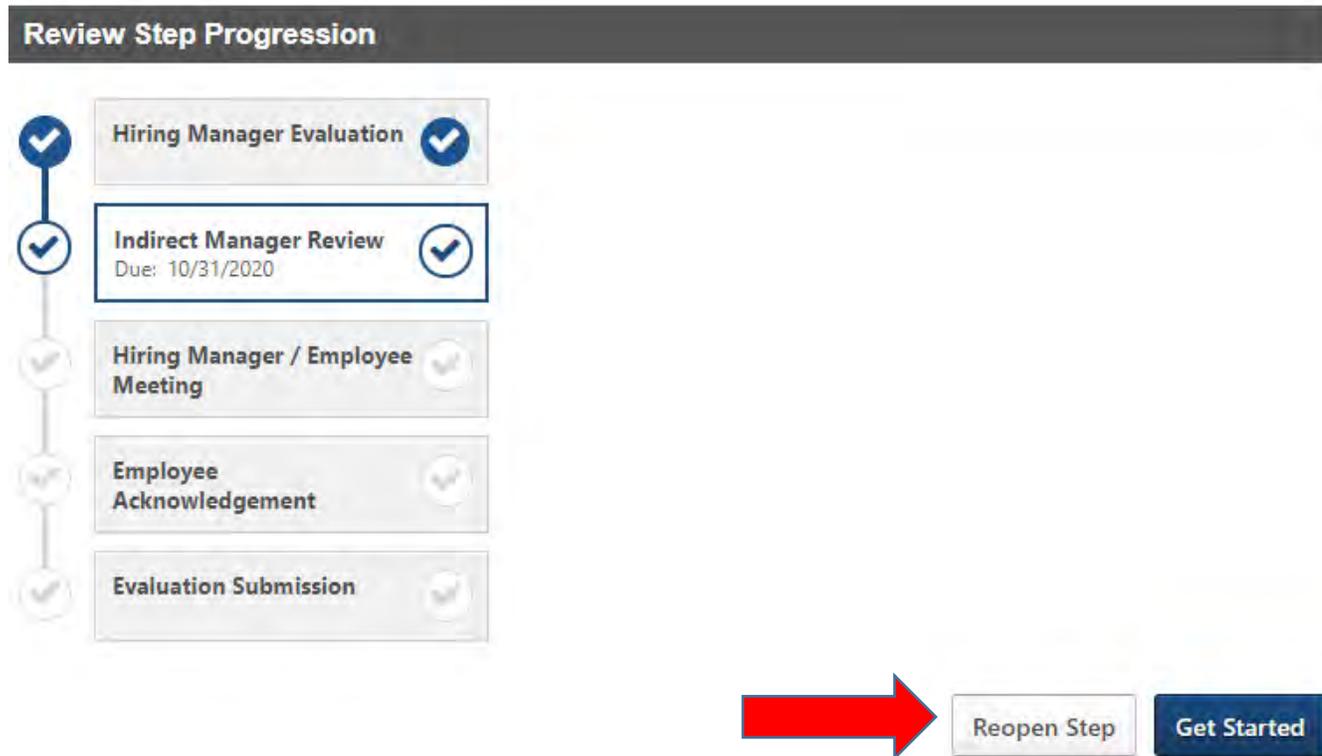
Indirect Manager  
Pending Signature

**Comment**

## STEP 2. INDIRECT MANAGER REVIEW

The indirect manager will follow the same instructions but will not be able to make any changes to the evaluation.

Go through and review the entire evaluation. If changes are necessary to the evaluation submitted by Hiring Manager, go back to reopen the hiring manager step. To reopen, click **Overview** on the left hand side panel then, click **Reopen step**



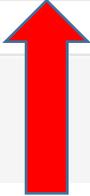
**A pop up window will open to add comments and save**

## Reopen Previous Review Step ×

You may only reopen 1 review step at a time. Only steps that have a status of Complete or Past Due will appear.

Hiring Manager Evaluation 

**Comment for reviewer**

More examples 

Cancel

Save 

Once you hit save, the evaluation will be sent back to the hiring manager to make necessary changes. An email is sent including the comments. The indirect manager can still go through the remaining portion of the evaluation and sign off.

The evaluation will go back to the hiring manager to complete the print evaluation and review with employee step.

### STEP 3. PRINT EVALUATION AND REVIEW WITH EMPLOYEE

Print the evaluation and schedule a time to review with the employee.

**Save and exit** out of this step.

Once the discussion has occurred go back into the evaluation and click **Save and Continue**.

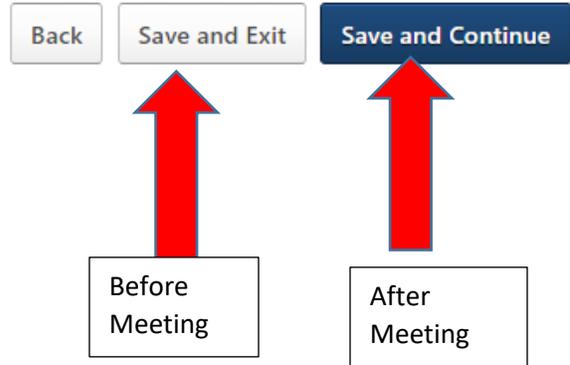
Note: You can go through the evaluations with the employee on the computer without printing if you wish.

# Print Evaluation - Conduct Meeting

Please schedule time to discuss the review with Stephanie Morgado. You are able to Print the Review (Click "Options" in upper right) to bring to the meeting. Click Save and Exit.

After the discussion has occurred, return to this task, provide the meeting date, comments and once complete submit this step.

**Print evaluation and click Save and Exit. Return to this task once the discussion is complete.**



## Hiring Manager/Employee Meeting Completed

Once the discussion has occurred, provide the meeting date, and comments. If you have not completed the discussion, click Save and Exit.

Once completed, click Submit. Clicking submit will forward the form to the employee.

**Supervisor/Employee Meeting Date**



**Discussed specific suggestions for Employee's development or improvement as noted below:**

Comments:

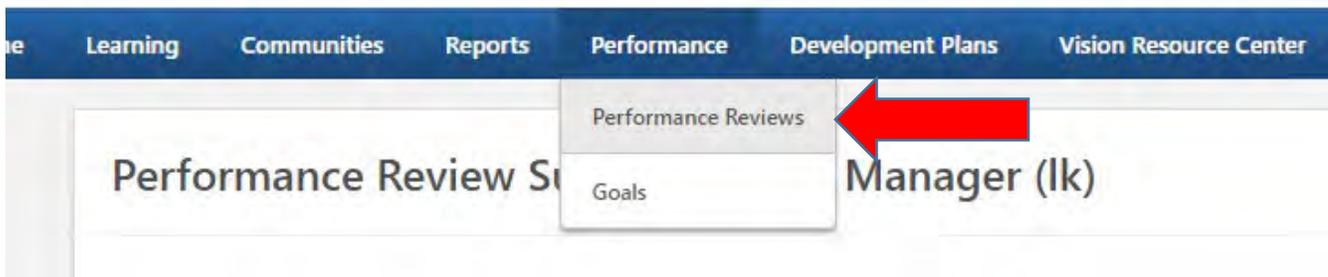
**B I U S**  $x_2$   $x^2$   $I_x$  |  |  |  |  | Font  Size  **A**  **A**

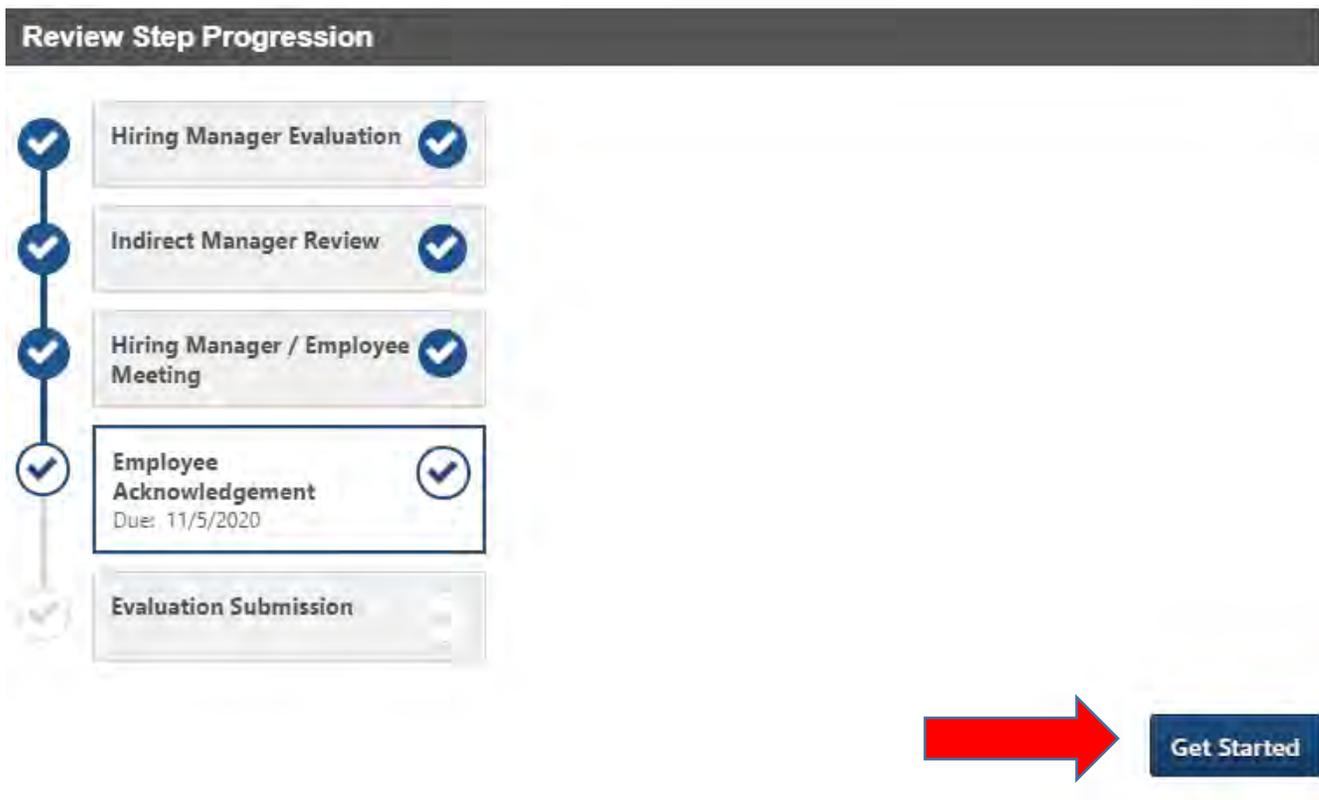
Empty text area for comments.

## STEP 4. EMPLOYEE ACKNOWLEDGEMENT

Once the Hiring Manager has reviewed the evaluation with the employee and has submitted it, an email will be sent to the employee to login and acknowledge the review. If the employee does not sign by the due date,



Once the employee is in the evaluation, click [Get Started](#). Employee reviews ratings, comments and signs online to confirm meeting was completed while in the presence of Hiring Manager.



Read through each section and click [Save and Exit](#) to return to the evaluation or click [Save and Continue](#) to move to the next section.

- Overview
- Local One Evaluations
- Leadership and Studen...
- Overall Rating and Co...
- Hiring Manager / Empl...
- Sign-off

- **Meets Expectations:** Dependable under normal circumstances.
- **Needs Improvement:** Dependability is not consistent; not regularly compliant with instructions and regulations.
- **Unsatisfactory:** Frequently undependable.

**Diogenes Shipp** (Manager) Rated: Exceeds Expectations Review: \_1, 09/29 TEST Classified\_Template \_ Time: 10/26/2020 1:57 PM

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**7. Attendance and Punctuality** ▼

Promptness/regularity in reporting for work.

- **Outstanding:** Rarely late/absent from work.
- **Exceeds Expectations:** Highly punctual with minimal absences.
- **Meets Expectations:** Infrequently late/absent from work.
- **Needs Improvement:** Frequently late/absent from work.
- **Unsatisfactory:** High absenteeism. Often late for work.

**Diogenes Shipp** (Manager) Rated: Exceeds Expectations Review: \_1, 09/29 TEST Classified\_Template \_ Time: 10/26/2020 1:57 PM

## Sign-off

**Supervisor's Signature:** Signature confirms you completed the review for Stephanie Morgado. When you hit submit, this will go directly to the Indirect Manager for review.

**Indirect Manager Signature:** Sign to confirm you have reviewed the evaluation for Stephanie Morgado.

**Employee Certification:** I have reviewed this report. In signing it, I do not necessarily agree with the evaluation. I understand that I have the right to add any comments in the space below.

Employee



**By signing this evaluation, the employee does not necessarily agree with the evaluation and they have the right to add any comments in the space provided.**

When done click **Submit**. You will not be able to modify once this has been submitted.

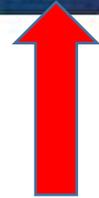
## Comment



Back

Save and Exit

Submit



## STEP 5. EVALUATION SUBMISSION

The Hiring Manager will receive email notification that the evaluation is ready to submit.

Once back in the system the Hiring Manager can review each section or skip to the employee sign-off section to view comments made by the employee.

Once you reach the Evaluation Submission Section create a PDF of the completed evaluation and any attachments by going to the Options dropdown and select "Print Review". Email the review PDF to the appropriate HR location:

1. If this is an evaluation for a college employee, the evaluation should be submitted to College Human Resources Assistant.
2. If this is an evaluation for a District Office employee, the evaluation should be submitted to the District Office Human Resources Support Services Manager

When done printing click **Submit**. You will be able to view the evaluation again but you will not be able to make any changes.



**Stephanie Morgado**  
Human Resources Generalist  
7/1/2019 - 6/30/2020



- Add Co-Planners
- Attachments
- Print Review
- Print Reviewee Version

## Evaluation Submission

Please create a PDF of the completed evaluation by going to the Options dropdown and select "Print Review". Email the review PDF to the appropriate HR location:

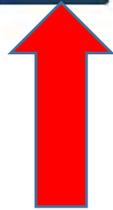
1. If a college employee, evaluation shall be submitted to College Human Resources Assistant.
2. If a District Office employee, evaluation shall be submitted to Human Resources Support Services Manager.

Email the evaluation PDF to Human Resources and Submit this step to complete the review.

Back

Save and Exit

Submit



### Reviewing completed/previous evaluations

You can review all completed evaluations in the performance review summary section. Check the *Show completed and expired tasks* box

The screenshot shows the Performance Review Manager interface. At the top, there is a navigation bar with tabs for Learning, Communities, Reports, Performance, and Development Plans. Below this, there is a dropdown menu for 'Performance Reviews' with 'Goals' as a sub-option. The main heading is 'Performance Review Summary Manager'. There are two tabs: 'My Assigned Reviews' and 'My Personal Reviews'. Below the tabs, there is a search section with a 'Title:' label, a search input field, and a 'Search' button. At the bottom, there is a checkbox labeled 'Show completed and expired tasks' which is checked and circled in blue.