



# Performance Evaluation System (PES)

Supervisors (Raters)

Office of Human Resources

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## PES – Supervisors Training

### Prerequisites

In order to use the HR PES system, you must meet the following minimum requirements.

#### PC – Windows XP/2000

- **Browsers**
  - o IE 6
  - o Netscape 7
  - o Mozilla 1.0/Firefox 0.8 and above

#### Mac OS X

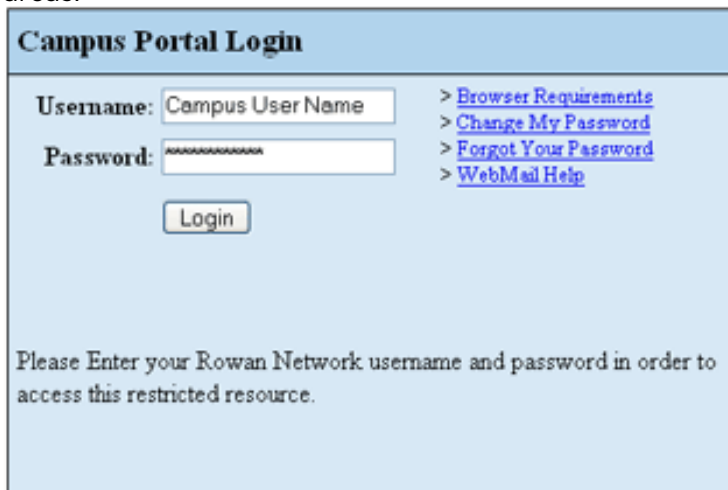
- **Browsers**
  - o Safari
  - o Netscape 7
  - o Mozilla 1.0/Firefox 0.8 and above

All of the following must be enabled on your browser of choice:

- JavaScript
- Cookies

### Log In

1. To log into the PES system, type the following URL into your browsers location bar:  
<https://www.rowan.edu/hr/pes> (note: you must use https, NOT http)
2. When prompted, type your network username and password in the corresponding areas.



**Campus Portal Login**

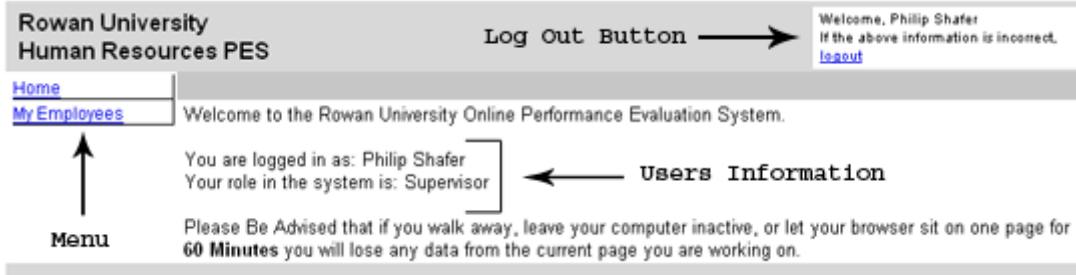
Username:  > [Browser Requirements](#)  
> [Change My Password](#)  
Password:  > [Forgot Your Password](#)  
> [WebMail Help](#)

Please Enter your Rowan Network username and password in order to access this restricted resource.

3. You will then be directed to the PES application.

## The PES Application

When you first log into the application, you will automatically be sent to the applications 'Home' page. You can also reach this page any time, by following the 'Home' link in the menu on the left hand side of the screen.



## Supervisor's 'Menu'

The Supervisor's menu is fairly simplistic, you only have two options:

- 'Home'
- 'My Employees'

You can use the 'Home' button at anytime during the process to return to the homepage. However, use caution when using this button, you will lose all data you haven't submitted.

When you click on 'My Employees' you will be taken to a list of your employees.

## My Employees

On the employees screen you will see two areas of significance:

1. The Employees Navigation Bar:

[| My Employees](#) | [My PES](#)

You can use this navigation bar to return to your 'My Employees' page. Also, you may notice a 'My PES' link. You can use the 'My PES' link to view the Performance Evaluations which have been submitted for you by your supervisor.

2. The second area to note on this screen is the employee select menu. Use this to select the employee for which you wish to add, update, or view a PES.

### Please Choose an Employee:

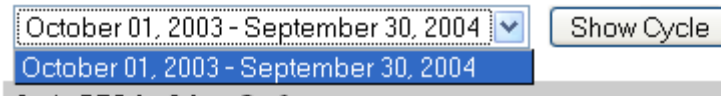
View PES History

Select the employee and click 'View PES History'.

## Employee PES History

The Employee PES History page consists of two functional areas:

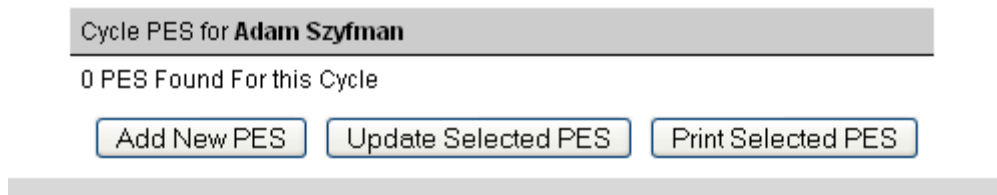
1. The Cycle Selection Menu:



A screenshot of a web interface showing a dropdown menu with the text "October 01, 2003 - September 30, 2004" selected. To the right of the dropdown is a button labeled "Show Cycle".

You can use this menu to select the cycle you wish to view employee PES cycles. This list contains all available PES cycles for the selected employee.

2. The Employee PES Menu:

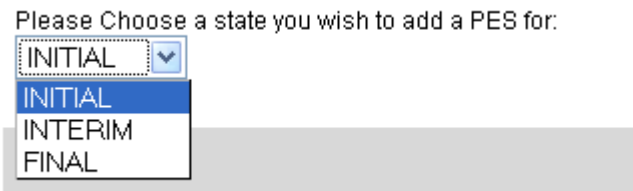


A screenshot of a web interface showing a header "Cycle PES for Adam Szyfman" and a sub-header "0 PES Found For this Cycle". Below these are three buttons: "Add New PES", "Update Selected PES", and "Print Selected PES".

This menu can be used to Add, Update, or Print evaluations available for the selected cycle.

## Adding A PES

If you wish to add a PES for a cycle, you can do so by clicking the 'Add New PES' button on the Employee PES Menu. When you add a new PES you will then be given an option for which state you wish to add a PES: Initial, Interim, or Final.



A screenshot of a web interface showing a dropdown menu with the text "Please Choose a state you wish to add a PES for:" above it. The dropdown menu is open, showing the options "INITIAL", "INTERIM", and "FINAL". The "INITIAL" option is selected.

Select the state for which you want to add a PES, and then click 'Add'

Please note the following stipulations for adding a PES state:

1. You must always add an 'Initial' PES for a cycle first. If you try to add an 'Interim' or 'Final' PES without adding an 'Initial' PES, you will receive an error message.
2. You can only add an 'Interim' PES to a cycle for an employee if an 'Initial' PES has been created first.
3. In order to add a 'Final' PES you must have completed at least an 'Initial' PES. For most cases an 'Interim' PES will be completed prior to the 'Final' PES, however it is not necessary.

These special cases include:

- a. The employee is leaving the University.
- b. The employee has received a lateral transfer. In this case, the employee's supervisor has changed. When this occurs the old supervisor must complete a 'Final' evaluation prior to the new supervisor starting a new evaluation set for the employee.
- c. The employee has received a promotion or demotion and their title has changed. When this occurs, a 'Final' evaluation on the 'old' title must be submitted prior to a new 'Initial' evaluation being created.
- d. For more information on these scenarios, please contact Human Resources.

## The 'Initial' PES

The 'Initial' PES process only contains a subset of information that the 'Interim' or 'Final' PES will contain. It is during this process for which the PES is set up for the rest of the cycle. Once you add an 'Initial' PES, you will then have access to the goals and job responsibilities on the next series of pages.

The first area of interest for the 'Initial' PES is the PES Navigation Menu. You have three (3) options on this menu.



1. PES Menu - This will take you back to the PES History for the employee.
2. Goals - This will take you to the 'Goals' section of the Initial PES.
3. Job Responsibilities - This will take you to the 'Job Responsibilities' section of the Initial PES.

## The 'Initial' Goals

This section is where you add the 'Unit/Workgroup Goals' and the 'Ratee Goals'. In order to complete this section, fill out the text areas in the appropriate areas and then submit the information by pressing the 'Update Goals' button on the bottom right of the page.

**Goals**

<b>Major Goals of the Unit/Work Group</b>
This is a unit goal

<b>Major Goals of the Ratee</b>
This is a goal of the ratee

Once you have successfully submitted the Goals for the PES you will be automatically taken to the next step, 'Job Responsibilities'.

## The 'Initial' Job Responsibilities

The Job Responsibilities section of the PES during the 'Initial' PES step is essentially the only area where the functionality of the evaluation of the PES process changes. It is during this, and **only during this step**, when a supervisor can add, update or remove Job Responsibilities. Once submitted, they can only be evaluated as 'Pass'/'Fail' during the 'Interim' and 'Final' PES steps.

When an Initial PES is created, the Job Responsibilities are empty as shown below.

Major Job Responsibilities			
Major Job Responsibilities	Essential Criteria Statement of conditions that exist when a job has been completed at the satisfactory level	Interim	Final
		Pass/Fail	Pass/Fail
<input type="button" value="Add New Job Responsibility"/> <input type="button" value="Edit Selected"/>			

In order to add a Job Responsibility, simply click the 'Add New Job Responsibility' button. You will then be asked to fill in some basic information:

Add Job Responsibility	
<b>Job Responsibility:</b>	<input type="text" value="Create Videos for Admissions Site"/>
<b>Essential Criteria:</b>	<input type="text" value="Assist Web Coordinator by creating streaming content for admission site."/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Fill out the form accordingly and then click the 'Add' button. If you make a mistake and wish not to add what you have typed into the text areas, click 'Cancel' to return to the Job Responsibility Page.

Once you have added one or more Job Responsibilities, then you will be able to edit them during this 'Initial' step only.

**Major Job Responsibilities**

Major Job Responsibilities	Essential Criteria Statement of conditions that exist when a job has been completed at the satisfactory level	Interim	Final	
		Pass/Fail	Pass/Fail	
1. Create Videos for Admissions Site	Assist Web Coordinator by creating streaming content for admission site.	Pass ▾	Pass ▾	<input type="radio"/>
<input type="button" value="Add New Job Responsibility"/> <input type="button" value="Edit Selected"/>				

To edit, choose a record by checking the radio button of the record you wish to edit. Once you have checked a record, choose the 'Edit Selected' button. You will then be taken to an update screen similar to the 'Add Job Responsibility' screen. Edit the text in one or both text fields, then press the 'Update' button.

**Completing the 'Initial' PES**

Once you are finished adding and editing the Goals and Job Responsibilities, you have now completed the 'Initial' PES. You can return to the employees PES History by pressing the 'PES Menu' button, or returning to your 'My Employees' page. Here you can choose begin work on another employee's PES information.

When you have completed your work in the system, you can log off by using the 'logout' link at the top right-hand corner or the browser screen, or you can simply close all of your browser windows you currently have opened.

## Interim and Final PES

The interim and final PES evaluation steps are identical processes. When adding these steps to the PES cycle a supervisor is asked to Update Goals, Evaluate Job Responsibilities, Evaluate Performance Measures, Add Events and Justifications.

## Interim and Final PES Navigation

For both the 'Interim' and 'Final' PES steps two new navigation areas are added to the PES Navigation at the top of the employee's PES page: 'Performance Measure' and 'Events'.



## Interim and Final Goals

The Goals sections of the PES for these two steps are similar to the Initial PES step. However, when an 'Interim' PES is created, it will copy the data from the 'Initial' PES and load it into the corresponding areas on the 'Interim' PES. For the 'Final' PES, the application attempts to load the data from the employee's 'Interim' PES. If the data for an 'Interim' PES is not found, then data from the employee's 'Initial' PES will be loaded.

## Job Responsibility Evaluation

For both the 'Interim' and 'Final' steps in the employee's PES cycle, the supervisor will be asked to evaluate the employee on the Job Responsibilities which were added during the 'Initial' PES step. A supervisor can only "evaluate" at this time. A additional Job Responsibility **cannot** be added here.

### Major Job Responsibilities

Major Job Responsibilities	Essential Criteria Statement of conditions that exist when a job has been completed at the satisfactory level	Interim	Final	
		Pass/Fail	Pass/Fail	
1. Create Videos for Admissions Site	Assist Web Coordinator by creating streaming content for admission site.	Pass ▾	Pass ▾	
<input type="button" value="Submit Evaluation"/>				

To evaluate an employee’s Job Responsibilities, a supervisor simply selects ‘Pass’ or ‘Fail’ from the active selection menu. During the ‘Interim’ evaluation step the Interim box is active and the ‘Final’ box is inactive. During the ‘Final’ evaluation step, the ‘Interim’ box is inactive and the ‘Final’ box is active. Once the evaluations are set, press the ‘Submit Evaluation’ button to save the evaluation and continue to the Performance Measures section of the PES.

### Performance Measures

Both the ‘Interim’ and ‘Final’ PES evaluation steps will ask the supervisor to evaluate an employee’s Performance Measures. This step is similar to the Job Responsibilities functions, however this section consists of a group of predefined questions set by the state.

Performance Measures	Standards for Satisfactory Achievement	Interim	Final
<b>Communication</b> Effective expression of ideas, concepts or directions in individual or group situations, using supportive gestures, voice level and organization of materials. If communication is written, thoughts are expressed with appropriate grammar, organization and structure.	Successfully communicated ideas, thoughts or directions. Asked appropriate questions and involved the listener. Sought clarification and affirmed understanding in verbal exchanges. Used appropriate supportive gestures, voice level and organization of materials. Formal presentations were organized and had appropriate detail. Written communication was concise and appropriate for target audience. Key points were understood by intended audience. Affirmed understanding with appropriate questions.	Pass ▾	Pass ▾
<b>Customer Service</b> Identifies and meets customer (internal and external) needs.	Accurately assessed customer needs; provided necessary or requested service within acceptable timeframes requiring few corrections or revisions; sought customer feedback and expression of satisfaction with work product. Occasionally sought alternative solutions.	Pass ▾	Pass ▾
<b>Job Knowledge/Skill</b> Extent to which employee knows the details of the job. Understands necessary technical knowledge and skills.	Effectively demonstrated job knowledge and ability to answer queries. Knowledge and skills contributed to the work of the unit.	Pass ▾	Pass ▾
<b>Problem Solving</b> Performed as a competent problem solver. Exhibited a logical approach to problem solving.	Identifies and analyzes problems; uses sound reasoning to arrive at conclusions; finds alternative solutions to complex problems; distinguishes between relevant and irrelevant information to make logical judgements. Considered risks and benefits in weighing alternatives.	Pass ▾	Pass ▾
<b>Teamwork</b> Works collaboratively in a group as a team member to accomplish stated goals.	Supported the team in meeting or exceeding essential objectives. Responsibly accomplishes work assignments in support of team objectives. Effectively cooperated with and contributed to help meet established team results. Worked to encourage good performance from others. Shared information in order to help team members accomplish goals. Encouraged other team members to be successful.	Pass ▾	Pass ▾
<b>Organizational Citizenship</b> Extent to which employee contributes to a productive and harmonious working environment by acting in a respectful manner towards people in the workplace.	Displayed respectful treatment of fellow workers, keeping an open line of communication. Willingness to cooperate with others who hold different views in order to complete the task/job at hand. Employee understands his/her part in shaping an organizational environment that values ethnic, cultural, religious, physical, gender and other individual differences.	Pass ▾	Pass ▾
<b>Workplace Safety</b> Ensures safety by maintaining a safe and secure work environment for self and others in the performance of the job functions and the delivery of service.	Took specific steps to demonstrate safe work practices. Anticipated potential safety issues and took action to alleviate them before a problem occurred. Observed appropriate safety standards and minimized exposure to unsafe conditions for self and others. Regularly demonstrated compliance with safety requirements and recommended measures to enhance safety whenever possible. Set an example in demonstrating safety requirements.	Pass ▾	Pass ▾
		Save & Continue	

To complete the evaluation for this step, select ‘Pass’ or ‘Fail’ for each of the areas, and click ‘Save & Continue’. This will place the evaluation into the employee’s PES and you will be directed to the final step of the process, the ‘Events’ sections.

## Events, Justifications, and Development Areas

The final step in the 'Interim' and 'Final' PES steps asks the supervisor to complete the Significant Events, a Justification for this step, and Areas Identified for Development.

### Significant Events

This area asks the supervisor to add one or more events which occurred during this rating cycle step. You will have the ability to 'Add' an event, 'Edit' and event an 'Remove' and event.

### Adding Significant Events

To add an event press the 'Add Event' button under the 'Significant Events' heading. Fill out the text area and click 'Add'. The event will then be added and you will return to the 'Events' section of the employee's PES.



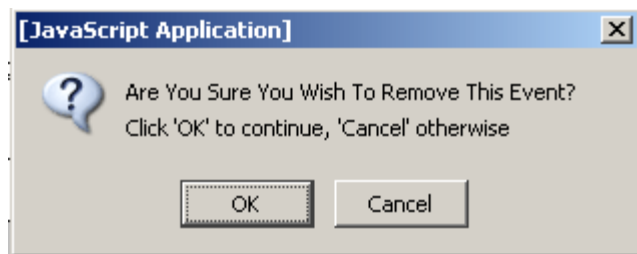
The screenshot shows a web form titled "Add Significant Event". It features a large, empty text input area for entering event details. At the bottom right of the form, there is a button labeled "Add".

### Editing Significant Events

To edit an event, check the radio button of the event you wish to edit, and press the 'Edit Selected' button under the Significant Events heading. You will see a screen similar to the 'Add Event' screen. Make the modifications necessary, and then click 'Update'. You will then be directed back to the Events page.

### Removing Events

To remove an event, check the radio button of the event you wish to remove. Press the 'Remove Selected' button. You will then be asked to confirm the removal of the event.



Click 'OK' to continue with the removal, otherwise click 'Cancel' to abort removal.

### **Justifications**

To add a justification for the 'Interim' or 'Final' evaluation step, fill out the Justification text area and press 'Update Justification'. The updated information will be saved and you can continue to the 'Specific Areas Identified for Development'.

### **Specific Areas Identified for Development**

Just as you would do for the Justifications, simply fill out the text area under the 'Specific Areas Identified for Development' heading and press 'Update Development Areas'. The information will then be saved.

### **Finishing the 'Interim' / 'Final'**

Once all the areas on the 'Events' page have been filled out properly, the supervisor has completed the PES for the selected rating step. The last piece of information displayed on the Events page is the Rating for the current evaluation step. This is automatically calculated based on the evaluations given on the Job Responsibilities and Performance Measures. There are two (2) values for this rating: Satisfactory and Unsatisfactory.

Once the rating has been completed, the supervisor may return to the employee's PES History by pressing the 'PES Menu' button on the PES Navigation Menu Bar. Once you are back at the employee's PES History, select the PES you wish to print and press the 'Print Selected PES' button. This will create a PDF of the selected PES which the Supervisor and Employee must sign and return to the Office of Human Resources.