Details for the Electronic Form

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<tr><td>OPTION B</td><td>This document is for schools and units <u>completing</u> an evaluation in the new online form</td></tr>
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Timeline: The electronic form will be available Now – September 30

Access the application through uab.edu/performancemgmt and choose "Option B: Use the New Form."

Before getting started

If you will be evaluating Individual Contributors or Emerging Leaders:

- The "Job Duties and Responsibilities" assessment is *optional* for these job roles. If applicable, managers should provide these criteria to employees so they may enter it on their Self-Evaluation. You may use the employee's job description, or a general description of their day-to-day duties and responsibilities.
- Goals are *optional* for these job roles. If applicable, each employee must add their goals on the electronic form for the goals to be added to their evaluation.

If you will be evaluating Functional Managers, Functional Directors or Organizational Leaders:

- Goals are *required* for these job roles. Each employee must add their goals on the electronic form for the goals to be appear on their evaluation.
- The Peer Review assessment is not available for the pilot process in FY19.

Evaluating an employee

1. Log into the app. Choose "Option B" on uab.edu/performancemgmt.

2. Click the "Options" button next to the employee's name whose evaluation you'd like to edit, then **choose "Performance Eval."**

3. Add your comments and ratings. Once your employee submits their Self-Evaluation, their ratings and comments will appear on the evaluation. *Your employee must submit their Self-Evaluation before you can submit your evaluation*. You can add, save, and continue to add your ratings and comments while waiting for your employee to submit his/her Self-Evaluation.

Employee ratings and comments appear after the employee submits their self-evaluation.

4. Submit your evaluation. Click "Save," then "Submit." Once you "Submit," your employee will be able to view your comments and ratings. *Note: An employee must "Submit" an evaluation before the Manager; otherwise, the "Submit" button will not be shown.*

5. Sign the evaluation. After you have saved and submitted your ratings and comments, both the manager and employee must sign the performance evaluation. Either person may sign first, but both signatures are required.

In order to sign, open the Performance Evaluation (see screenshot from Step 2) and scroll to the bottom of the page. Your mouse may be used to sign the form digitally.

Once the employee and the manager have signed the evaluation, the performance evaluation is finalized and completed. No manual uploading is required.