

2024 - 2025

UMB Performance Management Program Evaluation Form Instructions for Supervisors

This document in its entirety is guidance. It is not intended to replace existing policies, procedures, practices, or MOUs.

The Performance Management Program (PMP) is UMB's formal, annual process for employee evaluation and development. Participating in the PMP process is a critical responsibility for every supervisor, and it is expected that an evaluation be completed at the end of the performance cycle for each eligible employee. By using the process, employees are clear about goals, objectives, and expectations that are essential to an employee's development and overall success.

Performance Management Cycle: April 1st – March 31st

Employee Class	Performance Planning Phase 1	Performance Feedback and Development Phase 2	Mid-Cycle Review	Performance Evaluation Phase 3	Performance Evaluation Due Date
Non-Exempt	May 1 st – May 31 st	Ongoing	October	April 1 st – 30 th	April 30 th
Exempt	June 1 st – June 30 th	Ongoing	November 30 th	April 1 st – June 1 st	June 1 st

The electronic performance evaluation forms will be available through the online portal below:

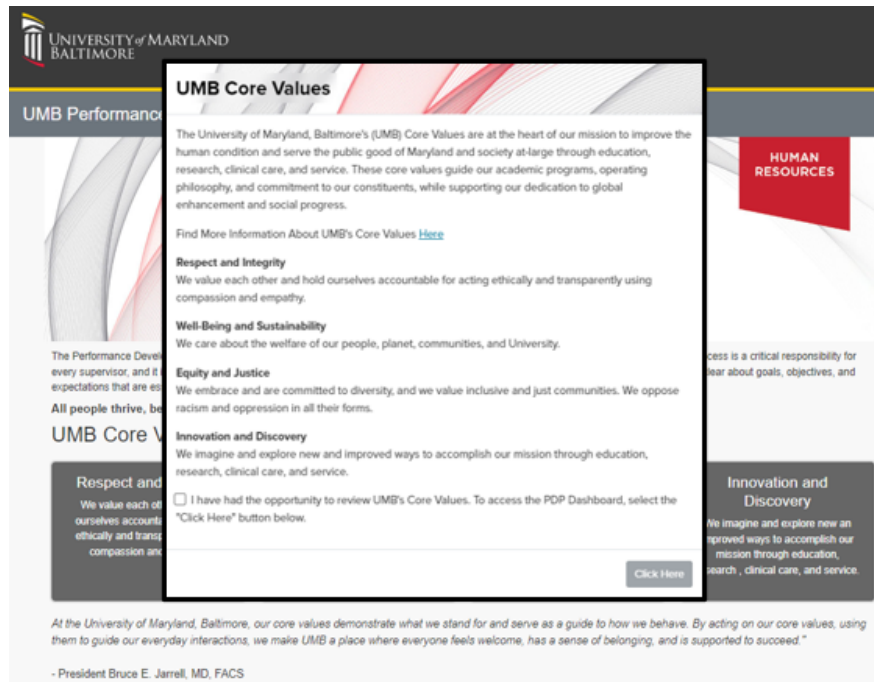
- Human Resource Services (HRS)-Employee and Labor Relations (ELR) website:
- [UMB Performance Management Program](#)
- HR widget on [myUMB](#) labeled UMB PMP Evaluation Form
- Preferred web browsers: Edge, Chrome, Firefox

Tools and Resources:

- Tools and resources will be available at the HRS-ELR website [UMB Performance Management Program](#) link.

Performance Management Program Platform

Using their UMB username and password to log-in, users will be directed to the Landing Page of the Performance Management Platform. Users will have an opportunity to review the UMB Core Values. To access the portal, check the box and select the “Click Here” button.



The screenshot shows the 'UMB Core Values' page. At the top, it says 'UMB Performance' and 'UMB Core Values'. The main text describes the UMB Core Values as being at the heart of the mission to improve the human condition and serve the public good. It lists four core values: Respect and Integrity, Well-Being and Sustainability, Equity and Justice, and Innovation and Discovery. Below the list, there is a checkbox labeled 'I have had the opportunity to review UMB's Core Values. To access the PDP Dashboard, select the "Click Here" button below.' and a 'Click Here' button.

UMB Core Values

The University of Maryland, Baltimore's (UMB) Core Values are at the heart of our mission to improve the human condition and serve the public good of Maryland and society at-large through education, research, clinical care, and service. These core values guide our academic programs, operating philosophy, and commitment to our constituents, while supporting our dedication to global enhancement and social progress.

Find More Information About UMB's Core Values [Here](#)

Respect and Integrity
We value each other and hold ourselves accountable for acting ethically and transparently using compassion and empathy.

Well-Being and Sustainability
We care about the welfare of our people, planet, communities, and University.

Equity and Justice
We embrace and are committed to diversity, and we value inclusive and just communities. We oppose racism and oppression in all their forms.

Innovation and Discovery
We imagine and explore new and improved ways to accomplish our mission through education, research, clinical care, and service.

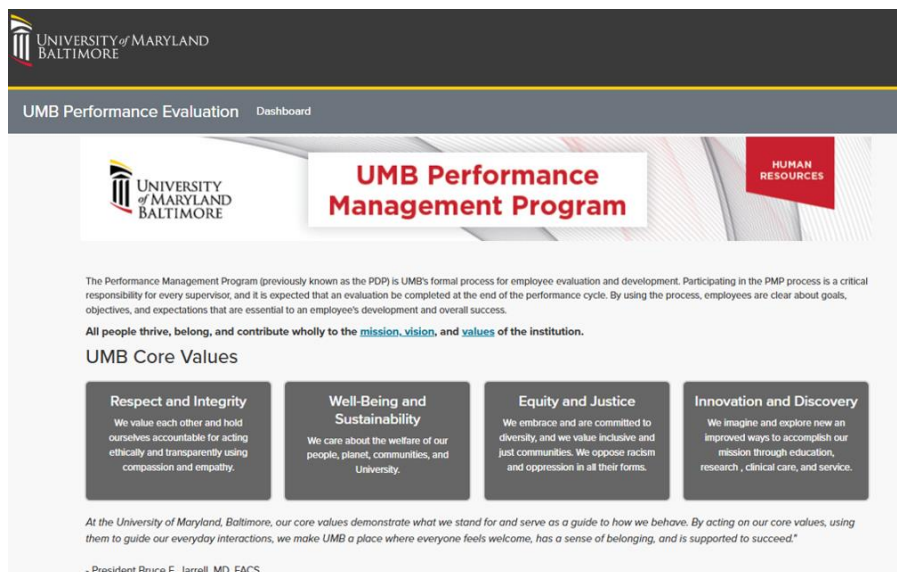
☐ I have had the opportunity to review UMB's Core Values. To access the PDP Dashboard, select the "Click Here" button below.

[Click Here](#)

At the University of Maryland, Baltimore, our core values demonstrate what we stand for and serve as a guide to how we behave. By acting on our core values, using them to guide our everyday interactions, we make UMB a place where everyone feels welcome, has a sense of belonging, and is supported to succeed."

- President Bruce E. Jarrell, MD, FACS

To access an Evaluation Form for the Performance Management Program, select the Dashboard link to view direct reports.



The screenshot shows the 'UMB Performance Evaluation Dashboard'. It features the UMB logo and the title 'UMB Performance Evaluation Dashboard'. Below the title, there is a section for 'UMB Core Values' with four cards: Respect and Integrity, Well-Being and Sustainability, Equity and Justice, and Innovation and Discovery. At the bottom, there is a quote from President Bruce E. Jarrell, MD, FACS.

UMB Performance Evaluation Dashboard

UMB Core Values

Respect and Integrity
We value each other and hold ourselves accountable for acting ethically and transparently using compassion and empathy.

Well-Being and Sustainability
We care about the welfare of our people, planet, communities, and University.


Equity and Justice
We embrace and are committed to diversity, and we value inclusive and just communities. We oppose racism and oppression in all their forms.

Innovation and Discovery
We imagine and explore new and improved ways to accomplish our mission through education, research, clinical care, and service.

At the University of Maryland, Baltimore, our core values demonstrate what we stand for and serve as a guide to how we behave. By acting on our core values, using them to guide our everyday interactions, we make UMB a place where everyone feels welcome, has a sense of belonging, and is supported to succeed."

- President Bruce E. Jarrell, MD, FACS

Supervisors may review an employee's prior PMP documents by selecting the person icon next to the employee's name.

My Direct Reports Other Rating Official (0) 2nd Level Reviewer (0) Final Reviewer Queue (0) My Evaluations (0)										
Evaluation Period: 2024 - 2025										
	Name	Title	Empl Class	Form or Evaluation Summary	Supv of Record Completed	Rating Official Completed	2nd Level Completed	Final Reviewer Completed	Direct Report Completed	Self-Eval and Oper Objectives and Goals (2025 - 2026)
	Jane Smith	Specialist, Employee Rel Sr.	Exempt	2024-2025 Annual Eval Form (Self—Eval Available)	Not Started					Self-Eval 2025 - 2026 Operational Obj and Learning and Supplemental Goals (available on 03/11/2025)

Once selected, a new window populates displaying documents created in the electronic platform.

Jane Smith— Employee Profile

- Supervisor: Sunday Jones
- Dept: HRS
- Email: jane.smith@umaryland.edu

Employee Evaluation History

- [2023 – 2024 Annual](#)
- [2022 – 2023 Annual](#)

Self-Evaluation History

- [2024 – 2025 Self-Eval](#)
- [2023 – 2024 Self-Eval](#)
- [2022 – 2023 Self-Eval](#)

Mid-Year Evaluation History

- [2024 – 2025 Mid-Year](#)
- [2023 – 2024 Mid-Year](#)

Goals

Year: **2024 – 2025:**

- Goal: Xxxx xxxxxx xxxxxx xxxxxx
- Goal: Xxxx xxxxxx xxxxxx xxxxxx

Objectives

Year: **2024 – 2025:**

- Operational Objective: Xxxx xxxxxx xxxxxx xxxxxx
- Operational Objective: Xxxx xxxxxx xxxxxx xxxxxx

Accessing an Employee's Evaluation

Using the Direct Reports tab, select the employee's evaluation form to begin the evaluation. Self-Evaluation indicators will populate if an employee has completed a self-evaluation.

NOTE: Employees are not required to complete a self-evaluation.

My Direct Reports Other Rating Official (0) 2nd Lever Reviewer (0) Final Reviewer Queue (0) My Evaluations (0)										
Evaluation Period: 2024 - 2025										
Name	Title	Empl Class	Form or Evaluation Summary	Supv of Record Completed	Rating Official Completed	2nd Level Completed	Final Reviewer Completed	Direct Report Completed	Self-Eval and Oper Objectives and Goals (2025 - 2026)	PIP Req
Jane Smith	Specialist, Employee Rel Sr.	Exempt	2024-2025 Annual Eval Form (Self-Eval Available)	Not Started					Self-Eval 2025 - 2026 Operational Obj and Learning and Supplemental Goals (available on 03/11/2025)	N/A
John Smith	Dir, Human Resources	Exempt	2024-2025 Annual Eval Form	Not Started					Self-Eval 2025 - 2026 Operational Obj and Learning and Supplemental Goals (available on 03/11/2025)	N/A

1. Self-Evaluation Completed by Employee

If an employee has completed a self-evaluation, messaging indicating a self-evaluation is available for copy over will display at the top of the evaluation screen. Supervisors who would like to use the employee's self-evaluation as a basis for completing the annual evaluation should select the grey button, "Step 1: Click Here to Preview Employee's Self Evaluation" to determine if they would like to copy over the information.

Jane Smith has completed their 2024 - 2025 self-evaluation. Do you want to copy their self-evaluation and use it as a basis for their 2024 - 2025 annual performance evaluation? You will be able to edit the performance evaluation once it has been copied. Copying the employee evaluation will not affect the employee's self-evaluation.

Supervisors are not permitted to use an employee's self-evaluation verbatim as the employee's annual evaluation.

If you do not want to copy the employee's self-evaluation, you can start the evaluation form below. If you decide not to copy the evaluation and start the evaluation form below, you will not be able to copy the employee's self-evaluation at a later time.

[Step 1: Click Here To Pre-View Employee's Self-Evaluation](#)

[Step 2: Click Here to Copy Employee's Self-Evaluation To Start Their 2024 - 2025 Evaluation](#)

Preview Employee's Self Evaluation to Determine Whether to Copy Over

Employee Information

Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.

A new window will open for supervisors to review the self-evaluation.

Self-Evaluation			
Employee Information			
Employee Last Name Smith	Employee First Name Jane	Id 012335	Employee ID# 012335
Job Title Specialist, Employee Rel Sr		School/Division Administration and Finance	Department HR
Does this employee supervise other employees? <input type="radio"/> Yes <input checked="" type="radio"/> No		Type of Evaluation Annual	Period Covered 2024
Supervisor of Record (Last Name, First Name) Sunday Jones	Supervisor of Record EMP# ID 012346	Supervisor of Record Email Address sunday.jones@umaryland.edu	Supervisor of Record Ext 410 706 7302
Operational Objectives			
Objective: Team Building			
Rating: <input type="radio"/> Outstanding <input type="radio"/> Above Standards <input checked="" type="radio"/> Meets Standards <input type="radio"/> Below Standards <input type="radio"/> Unsatisfactory <input type="radio"/> N/A			
Comments: Completing my day to day duties while also assisting my team when needed.			
Competencies			
Basic work factors: Quality of work, quantity of work and timeliness			
Rating: <input type="radio"/> Outstanding <input type="radio"/> Above Standards <input checked="" type="radio"/> Meets Standards <input type="radio"/> Below Standards <input type="radio"/> Unsatisfactory <input type="radio"/> N/A			
Comments:			
Work habits: Attendance and punctuality			
Rating: <input type="radio"/> Outstanding <input checked="" type="radio"/> Above Standards <input type="radio"/> Meets Standards <input type="radio"/> Below Standards <input type="radio"/> Unsatisfactory <input type="radio"/> N/A			
Comments:			
Interactions: Cooperation and teamwork, interpersonal relationships			
Rating: <input type="radio"/> Outstanding <input type="radio"/> Above Standards <input checked="" type="radio"/> Meets Standards <input type="radio"/> Below Standards <input type="radio"/> Unsatisfactory <input type="radio"/> N/A			
Comments:			
Customer service and/or public relations: Meeting customer expectations and representing UMD to the public			
Rating: <input type="radio"/> Outstanding <input checked="" type="radio"/> Above Standards <input type="radio"/> Meets Standards <input type="radio"/> Below Standards <input type="radio"/> Unsatisfactory <input type="radio"/> N/A			
Comments:			
Problem solving skills: Problem solving, handling challenges, creativity			
Rating: <input type="radio"/> Outstanding <input type="radio"/> Above Standards <input checked="" type="radio"/> Meets Standards <input type="radio"/> Below Standards <input type="radio"/> Unsatisfactory <input type="radio"/> N/A			
Comments:			
Learning Goals and Development			
Learning goal/development activity:			
Activity Category Customer Focus	Activity: To respond to customers within 24 hours.		
Rating: <input checked="" type="radio"/> Met <input type="radio"/> In-Process <input type="radio"/> Not Met <input type="radio"/> Not Applicable			
Learning goal/development activity:			
Activity Category Self-Development	Activity: Attended multiple trainings virtual and in person. Was able to gain more insight about FMLA.		
Rating: <input checked="" type="radio"/> Met <input type="radio"/> In-Process <input type="radio"/> Not Met <input type="radio"/> Not Applicable			
Learning goal/development activity:			
Activity Category Drive for Results	Activity: Continue to ask questions and take notes to better understand my duties.		
Rating: <input type="radio"/> Met <input checked="" type="radio"/> In-Process <input type="radio"/> Not Met <input type="radio"/> Not Applicable			
Summary of Overall Performance			
Overall Rating and Comments:			
Overall Rating: <input type="radio"/> Outstanding <input type="radio"/> Above Standards <input checked="" type="radio"/> Meets Standards <input type="radio"/> Below Standards <input type="radio"/> Unsatisfactory <input type="radio"/> N/A			
Comments: I believe I am still learning each day and look forward to becoming an expert in my role.			
Signatures			
Employee signature: my signature below is to verify that I have reviewed this performance evaluation and had the opportunity to discuss the contents with my immediate supervisor or the rating official. Although I am required to sign it, my signature does not imply my agreement or disagreement.			
Employee Comments:			
Employee Name: Jane Smith	Employee Signature: <i>Jane Smith</i>	Employee Title: Specialist, Employee Rel Sr	Date: 04/02/2025
Supervisor of Record Name: Sunday Jones	Supervisor of Record Signature: N/A	Supervisor of Record Title: Dir, Employee/Labor Relations	Date:
Other Rating Official: N/A	Other Rating Official Signature: N/A	Other Rating Official Title: N/A	Date: N/A
2nd Level Reviewer Name: N/A	2nd Level Reviewer Signature: N/A	2nd Level Reviewer Title: N/A	Date: N/A

NOTE –Copying the employee evaluation will not affect the employee’s self-evaluation. Supervisors are not permitted to copy an employee’s self-evaluation verbatim into the employee’s official annual evaluation. Supervisors are required to provide an independent assessment of the employee’s performance which may include integration of information from the employee’s self-evaluation.

Supervisors who would like to use the self-evaluation as a basis for the annual evaluation should select “Step 2: Click Here to Copy Employee’s Self-Evaluation to Start The 2024 – 2025 Evaluation”.

Jane Smith has completed their 2024 - 2025 self-evaluation. Do you want to copy their self-evaluation and use it as a basis for their 2024 - 2025 annual performance evaluation? You will be able to edit the performance evaluation once it has been copied. Copying the employee evaluation will not affect the employee's self-evaluation.

Supervisors are not permitted to use an employee's self-evaluation verbatim as the employee's annual evaluation.

If you do not want to copy the employee's self-evaluation, you can start the evaluation form below. If you decide not to copy the evaluation and start the evaluation form below, you will not be able to copy the employee's self-evaluation at a later time.

Step 1: Click Here To Pre-View Employee's Self-Evaluation

Step 2: Click Here to Copy Employee's Self-Evaluation To Start Their 2024 - 2025 Evaluation

Copy Over Employee's Self-Evaluation

Employee Information

Once selected, a confirmation screen appears. Select Next.

UMB Performance Evaluation

Evaluation copied successfully.

Next

Once Copied, Confirmation Screen Appears

Supervisors will proceed throughout the evaluation screens.

Employee Information

Employee Information

Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.

Employee Information

Employee Last Name	Employee First Name	MI	Employee ID#
Smith	Jane		012345
Job Title	School/Division	Department	
Specialist, Employee Rel Sr	HRS	Human Resources	
Does this employee supervise other employees?	Type of Evaluation	Period Covered	
<input checked="" type="radio"/> Yes <input type="radio"/> No	Annual	2024 - 2025	
Supervisor of Record: (Last Name, First Name)	Supervisor of Record EMPL ID	Supervisor of Record Email Address	Supervisor of Record Ext
Jones, Sunday	012346	sunday.jones@umaryland.edu	410 706 7302
Is there a rating official other than the supervisor of record?			
<input type="radio"/> Yes <input checked="" type="radio"/> No			

Save Employee Information

Confirm Copied Over Information is Accurate. Modify as Needed.

NOTE - Supervisors MUST confirm the copied over information is accurate and make corrections as needed.

Operational Objectives

Review the Operational Objective language at the top of the screen.

The screenshot shows the 'Operational Objectives' section of a performance evaluation system. At the top, a navigation bar includes 'Employee Information', 'Operational Objectives' (selected), 'Supervisory Objectives', 'Competencies', 'Learning Goals and Development Plans', 'Summary of Overall Performance', 'Review', and 'Print'. Below this, a blue banner states: 'Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.' The 'Operational Objectives' section has a header and a paragraph: 'Enter the operational objectives that were established for the employee at the beginning or during the performance cycle. Objectives are clearly defined outcomes that are aligned with the goals of the unit or UMB as a whole, have an impact on departmental operations, are measurable, and can be achieved during the cycle identified.' Below this is a red box with two bullet points: 'It is highly recommended that you save your work periodically in order to avoid any loss of data entry using the blue button below. You do not have to complete all sections at once.' and 'NOTE: Avoid copying and pasting bullets from MS Word or other word-processing applications. Copying and pasting bullets may result in data not being saved.' A question 'Were operational objectives created for the current rating cycle?' has 'Yes' selected. The 'Objective' section has a text area with 'Teambuilding'. Below this is a 'Rating' section with radio buttons: 'Outstanding', 'Above Standards', 'Meets Standards' (selected), 'Below Standards', 'Unsatisfactory', and 'N/A'. A 'Comments' section has a text area with the text: 'Although Jane completes her day-to-day duties while also assisting her team as needed, there are areas of opportunity that Jane can improve on including xxxx, xxxx, and xx. During this evaluation cycle, we have discussed this need for improvement on multiple occasions including our weekly 1-1 meetings on November 11, 2024, and January 15, 2025. Xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx.' At the bottom is a blue 'Save Operational Objectives' button. Two red callout boxes are present: one on the left says 'Confirm Copied Over Information is Accurate. Modify Text and Ratings as Needed.' with an arrow pointing to the 'Meets Standards' radio button; another on the right says 'Formatting Enhancements' with a list: 'Bullets/Numbering', 'Text Justification', 'Indentation', and 'Textbox Expansion', with an arrow pointing to the 'Comments' text area.

Confirm Copied Over Information is Accurate. Modify Text and Ratings as Needed.

Formatting Enhancements

- Bullets/Numbering
- Text Justification
- Indentation
- Textbox Expansion

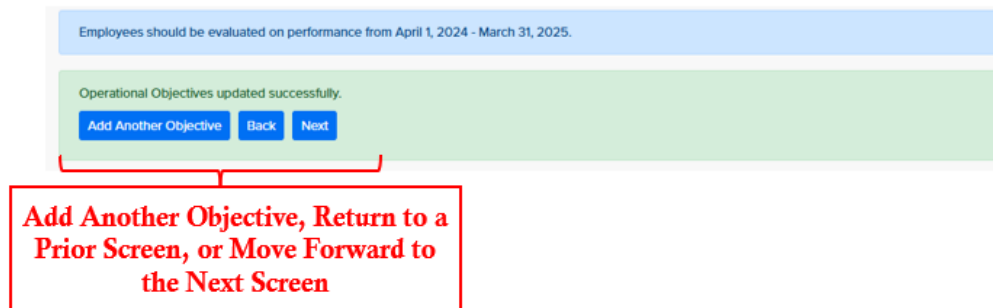
NOTE – Operational Objectives that were created in the Planning Phase and entered in the electronic platform will populate for review. Confirm the Operational Objectives are accurate based on what was communicated to the employee and continue.

Supervisors may use employee’s comments as a basis for the annual evaluation. Supervisors are required to provide an independent assessment of the employee’s performance which may include integration of information from the employee’s self-evaluation.

Operational Objectives that were created in the Planning Phase but NOT entered in the electronic platform may be manually entered if they were communicated to the employee. Select Yes. An Operational Objective subsection will populate for completion. Enter Operational Objectives manually. Select Save Operational Objectives and add another objective using the “Add Another Objective” button. Continue manually adding until all objectives are entered.

If Operational Objectives were not created in the Planning Phase of the cycle during the prior year, do not create Operational Objectives now. Select No.

If No is selected, continue to the Competencies screen.



Use “Back” and “Next” buttons to move throughout the evaluation.

Supervisory Objectives

If the employee was identified as supervising staff on the Employee Information screen, a Supervisory Objective screen will populate for completion. Complete this section only when assessing the performance of an individual who supervises other employees.

If the employee was not identified as supervising staff on the Employee Information screen, the Supervisory Objectives screen will not appear for completion. Make corrections to the Employee Information Screen question as needed.

Using the ⓘ icon to access the Performance Management Rating Scale Definitions, select a rating that represents the employee’s overall performance for the identified competency, and insert comments that are fact-based and support the designated rating. A comment must be entered for all ratings aside from “Meets Standards”.

Text and Ratings Copied Over Exactly as Entered on Employee Self Evaluation. Integrate Text as Needed. Modify Ratings as Needed.

Employee Information Operational Objectives **Supervisory Objectives** Competencies Learning Goals and Development Plans Summary of Overall Performance Review Print

Employees should be evaluated on performance from April 1, 2024 – March 31, 2025.

Supervisory Objectives:
Complete this section only when assessing the performance of an individual who supervises other employees. Select a rating that coincides with the level of performance as it pertains to the factors listed. Insert comments that are fact based and support the designated rating.
Note: It is highly recommended that you save your work periodically in order to avoid any loss of data entry using the blue button below. You do not have to complete all objectives at once.

A. Interacts effectively and maintains positive relationships with peers, subordinates and customers

Rating: **i**
☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments: **i**

Jane interacts effectively and in a positive manner with her staff as well as with all colleagues/oo-workers and others throughout campus. She strives to provide a positive environment where all are welcome. Jane is the first to volunteer to assist her colleagues with trainings and understanding new items. I can always count on Jane to go above and beyond. Xxxx xxxxx xxxxxx xxxx xxxxx

36 WORDS, POWERED BY TRY

B. Uses appropriate resources to make decisions and provides information and feedback in a timely manner

Rating: **i**
☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments: **i**

Jane uses all applicable resources when making decisions and always provides feedback or other information in a timely manner. Jane has proactively created standard operating procedures to be shared amongst her team. Jane's budget review resulted in a surplus of 50K this year. Xxxx xxxxx xxxxxx xxxx xxxxx

19 WORDS, POWERED BY TRY

Understands facts and information related to work assignments, department, university and university policies

Rating: **i**
☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments: **i** Comments are required for Outstanding, Above Standards, Below Standards, Unsatisfactory

0 WORDS, POWERED BY TRY

Save Supervisory Objectives

Comments Are Required For All Ratings Aside From "Meets Standards"

Select Save Supervisory Objectives.

Use "Back" and "Next" buttons to move throughout the evaluation.

Competencies

Using the **i** icon to access the Performance Management Rating Scale Definitions, select a rating that represents the employee's overall performance for the identified competency, and insert comments that are fact-based and support the designated rating. A comment must be entered for all ratings aside from "Meets Standards".

Text and Ratings Copied Over Exactly as Entered on Employee Self Evaluation. Integrate Text as Needed. Modify Ratings as Needed.

Select Save Competencies.

Use “Back” and “Next” buttons to move throughout the evaluation.

Learning Goals and Development Plan

This section indicates the learning goals and development plans that were established at the beginning of the current rating cycle; the employee should have already completed these activities.

NOTE – Learning Goals and Development Plans that were created in the Planning Phase and entered in the electronic platform will populate for review. Confirm that the Learning Goals and Development Plans are accurate based on what was communicated to the employee and continue.

Employee Information Operational Objectives Supervisory Objectives Competencies Learning Goals and Development Plans Summary of Overall Performance Review Print

Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.

Learning Goals and Development Plans

Learning activities may include online or instructor led training, reading, experiential, etc.

- It is highly recommended that you save your work periodically in order to avoid any loss of data entry using the blue button below. You do not have to complete all sections at once.
- NOTE: Avoid copying and pasting bullets from MS Word or other word-processing applications. Copying and pasting bullets may result in data not being saved.

Were goals or development plans created for the current rating cycle?

☒ Yes ☐ No [Next](#)

A. Learning goal/development activity:

Activity Category: Accountability

Activity: By February 3, 2025, Jane will create a presentation on conducting employee investigations and train three of her assigned customer groups.

0 WORDS, POWERED BY TINY

Rating: 

☐ Met ☐ In Process ☐ Not Met ☐ Not Applicable

B. Learning goal/development activity:

Activity Category:

Activity:

0 WORDS, POWERED BY TINY

Rating: 


☐ Met ☐ In Process ☐ Not Met ☐ Not Applicable

C. Learning goal/development activity:

Activity Category:

Activity:

0 WORDS, POWERED BY TINY


Rating: 

☐ Met ☐ In Process ☐ Not Met ☐ Not Applicable

[Save Learning Goals and Development Plans](#)

Learning Goals and Development Plans that were created in the Planning Phase but NOT entered in the electronic platform may be manually entered if they were communicated to the employee by selecting Yes.

If Yes is selected, a Learning Goals/Development Activity subsection will populate for completion. Using a dropdown field, select a category that most closely applies to each of the activities that were assigned and include a brief description.

Using Rating Scale Definitions located by selecting the  icon, select a rating that represents the employee's completion status for the assigned goal/development plan.

NOTE – Supervisors may use employee’s comments as a basis for the annual evaluation. Supervisors are required to provide an independent assessment of the employee’s performance which may include integration of information from the employee’s self-evaluation.


If Learning Goals and Development Plans were not created in the Planning Phase of the cycle during the prior year, do not create them now. Select No.

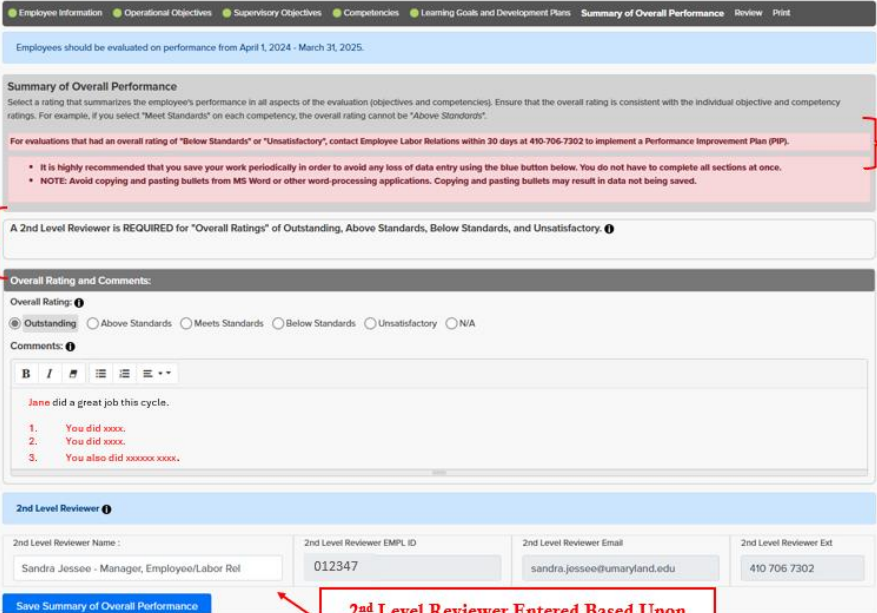
If No is selected, select “Save Learning Goals and Development Plans” and continue to the Summary of Overall Performance screen.

Use “Back” and “Next” buttons to move throughout the evaluation.

Summary of Overall Performance

Select a rating that summarizes the employee’s performance in all aspects of the evaluation. Ensure that the overall performance rating is consistent with the individual objective and competency ratings. For example, if “Meets Standards” is selected on each competency, the overall rating cannot be “Above Standards.”

A 2nd Level Reviewer is required for all overall rating aside from “Meets Standards”. (Use the  icon to determine who the 2nd Level Reviewer may be).



The screenshot shows the 'Summary of Overall Performance' form. At the top, a navigation bar includes tabs for Employee Information, Operational Objectives, Supervisory Objectives, Competencies, Learning Goals and Development Plans, Summary of Overall Performance, Review, and Print. Below the navigation bar, a blue banner states: 'Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.' The main section is titled 'Summary of Overall Performance' and contains instructions: 'Select a rating that summarizes the employee's performance in all aspects of the evaluation (objectives and competencies). Ensure that the overall rating is consistent with the individual objective and competency ratings. For example, if you select "Meet Standards" on each competency, the overall rating cannot be "Above Standards".' It also includes a note about contacting Employee Labor Relations for a Performance Improvement Plan (PIP) if the overall rating is 'Below Standards' or 'Unsatisfactory'. A red box on the left states: 'A 2nd Level Reviewer is REQUIRED for all Overall Ratings Aside from "Meets Standards"'. A red box on the right states: 'Employees Who Receive an Overall Rating Below "Meets Standards" MUST Have a PIP Implemented.' The 'Overall Rating' section has radio buttons for Outstanding, Above Standards, Meets Standards, Below Standards, Unsatisfactory, and N/A. The 'Comments' section has a text area with a rich text editor toolbar and a list of bullet points. The '2nd Level Reviewer' section has fields for Name, EMPL ID, Email, and Ext. A red box at the bottom states: '2nd Level Reviewer Entered Based Upon Overall Rating Requirement'.

A 2nd Level Reviewer is REQUIRED for all Overall Ratings Aside from "Meets Standards"

Employees Who Receive an Overall Rating Below "Meets Standards" MUST Have a PIP Implemented.

2nd Level Reviewer Entered Based Upon Overall Rating Requirement

If the overall rating selected is below “Meets Standards,” the supervisor is required to contact Employee Labor Relations, at (410) 706-7302 or hrelr@umaryland.edu, to implement a Performance Improvement Plan (PIP) within 30 days of the evaluation meeting.

Review and Signature

The Review section allows for review of the evaluation content before submitting to the next individual in the workflow. Any changes should be made by selecting the associated screen before signing the evaluation.

● Employee Information ● Operational Objectives ● Supervisory Objectives ● Competencies ● Learning Goals and Development Plans ● Summary of Overall Performance ● **Review** Print

Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.

Please review the evaluation below.

Employee Information			
Employee Last Name Smith	Employee First Name Jane	Mi	Employee ID# 012335
Job Title Specialist, Employee Rel Sr	School/Division Administration and Finance	Department SOM Office of Resource Mgmt	

If the School/ Administrative Unit has required a Final Reviewer, a Final Reviewer’s name will auto-populate, and supervisors will not have an option to answer the Final Reviewer question. If the Final Reviewer is hardcoded, the supervisor will select the Sign Evaluation button and submit to the next individual in the workflow.

Signatures

Sunday Jones (Supervisor of Record):
If you have completed and reviewed the evaluation for **Jane Smith** please click on the Sign Evaluation button below. Depending on whether an Other Rating Official and/or 2nd Level Reviewer is identified, the evaluation will be processed accordingly. **Note:** Please review the evaluation carefully prior to signing. Once signed, others will be able to see the evaluation.

Does this evaluation need to be reviewed by a Final Reviewer? ⓘ
☒ Yes ☐ No

Reviewer's Name: Marina Sevdalis - Specialist, Employee Rel Sr <small>Type person's name and select from drop down list</small>	Reviewer's Title Specialist, Employee Rel Sr	Reviewer's Email Address marina.sevdalis@umaryland.edu
---	---	---

Sign Evaluation

Employee signature: my signature below is to verify that I have reviewed this performance evaluation and had the opportunity to discuss the contents with my immediate supervisor or the rating official. Although I am required to sign it, my signature does not imply my agreement or disagreement.

Employee Comments:

Employee Name: Jane Smith	Employee Signature:	Employee Title: Specialist, Employee Rel Sr	Date:
Supervisor of Record Name: Sunday Jones	Supervisor of Record Signature:	Supervisor of Record Title: Dir, Employee/Labor Relations	Date:
Other Rating Official: Lisbet Escobar	Other Rating Official Signature: N/A	Other Rating Official Title: Administrator, EE Rel/Lv Mgmt	Date:
2nd Level Reviewer Name: Sandra Jessee	2nd Level Reviewer Signature: N/A	2nd Level Reviewer Title: Manager, Employee/Labor Rel	Date:

If the School/Administrative Unit has deemed the question to be optional, use the **i** icon to determine who the Final Reviewer may be. If Yes is selected, begin typing the Final Reviewer's name in the first field. The system will populate names for selection based on the text entered.

Once the Final Reviewer's name has been selected, the remaining fields will auto-populate.

Selecting the Sign Evaluation button will submit the evaluation to the next individual in the workflow.

2. Self-Evaluation Not Completed by Employee

If an employee has not completed a self-evaluation, supervisors will receive a notification indicating a self-evaluation is not available for copy over. Supervisors who would like to use the employee's self-evaluation as a basis for completing the annual evaluation should speak with the employee about completing their self-evaluation. Supervisors who would like to proceed without using the employee's self-evaluation, may do so by proceeding with the Employee Information screen.

The screenshot displays the 'Employee Information and Summary' header and the 'UMB Performance Evaluation Summary Form'. A red-bordered box highlights a notification for John Smith, stating that he has not started his 2024-2025 self-evaluation and that supervisors should ask him to complete one. Below the notification, the 'Employee Information' section contains several fields: 'Employee Last Name' (Smith), 'Employee First Name' (John), 'Mi' (empty), 'Employee ID#' (012456), 'Job Title' (Director, Human Resources SOM Sr), 'School/Division' (a dropdown menu), and 'Department' (HRS).

Employee Information

All greyed out fields are automatically populated.

Select the School/Division using the dropdown option.

Choose either Yes or No to identify whether the employee supervises other employees. The answer selected will determine whether a screen with Supervisory Objectives populates.

Choose either Yes or No to identify if there is a rating official other than the supervisor of record. Select the **i** icon for further information to aid in the selection of the choice.

Select the “Save Employee Information” button to proceed.

Continue to the next screen by selecting Next.

Operational Objectives

Review the Operational Objective language at the top of the screen.

Operational Objectives

Enter the operational objectives that have been established for the employee at the beginning or during the performance cycle. Objectives are clearly defined outcomes that are aligned with the goals of the unit or UMB as a whole; have an impact on departmental operations; are measurable and can be achieved during the cycle identified. This can also include information directly from the employee's job description.

Were operational objectives created for the current rating cycle?

☐ Yes ☐ No

Radio Button Selection

If Operational Objectives were created for the rating cycle (these objectives would have been created in the Planning Phase during the prior year), select Yes.

Operational Objectives that were created in the Planning Phase and entered in the electronic platform will populate for review. Confirm that the Operational Objectives are accurate to what was agreed upon and continue.

Operational Objectives that were created in the Planning Phase but NOT entered in the electronic platform may be manually entered as long as they were previously made known to the employee. Enter Operational Objectives manually.

If Operational Objectives were not created in the Planning Phase of the cycle during the prior year, do not create Operational Objectives now. Select No.

If No is selected, continue to the Competencies screen. If Yes is selected, an Objective subsection will populate for completion.

B. Operational Objectives

Enter the operational objectives that have been established for the employee at the beginning or during the performance cycle. Objectives are clearly defined outcomes that are aligned with the goals of the unit or UMB as a whole; have an impact on departmental operations; are measurable and can be achieved during the cycle identified. This can also include information directly from the employee's job description.

Objective

Enter Objective

Rating: **i**

☐ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments: **i**

Objective

Enter Objective

Rating: **i**

☐ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments: **i**

Remove Objectives as Needed

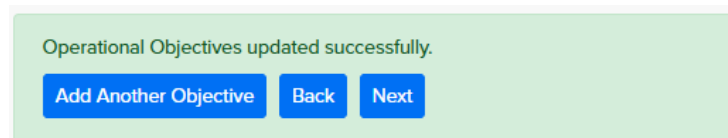
Enter in the Operational Objectives that were previously created.

Rating: Using the ⓘ icon to access the Performance Management Rating Scale Definitions, select a rating that represents the employee's overall performance for the identified objective, assess whether the objective was accomplished, to what degree, and whether it was done within the established time frame. Take into consideration any challenges the employee may have faced and how it may have impacted the outcome of the objective.

Comments: Factual comments should be included to support the rating, communicate strengths and weaknesses, and other pertinent feedback. A comment must be entered for all ratings aside from "Meets Standards".

To remove objectives, select the "Remove This Objective" button.

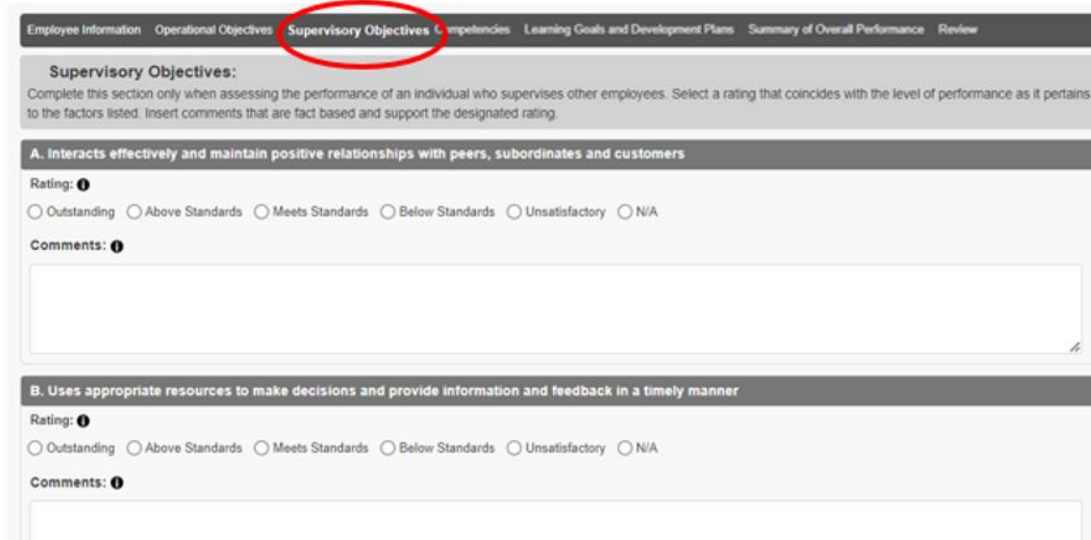
To add additional objectives, select the "Add Another Objective" button.



Select "Save Operational Objectives" to save entered text and selections.

Supervisory Objectives

If the employee was identified as supervising staff on the Employee Information screen, a Supervisory Objective screen will populate for completion. Complete this section only when assessing the performance of an individual who supervises other employees.



Employee Information Operational Objectives **Supervisory Objectives** Competencies Learning Goals and Development Plans Summary of Overall Performance Review

Supervisory Objectives:
Complete this section only when assessing the performance of an individual who supervises other employees. Select a rating that coincides with the level of performance as it pertains to the factors listed. Insert comments that are fact based and support the designated rating.

A. Interacts effectively and maintain positive relationships with peers, subordinates and customers

Rating: ⓘ
☐ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments: ⓘ

B. Uses appropriate resources to make decisions and provide information and feedback in a timely manner

Rating: ⓘ
☐ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

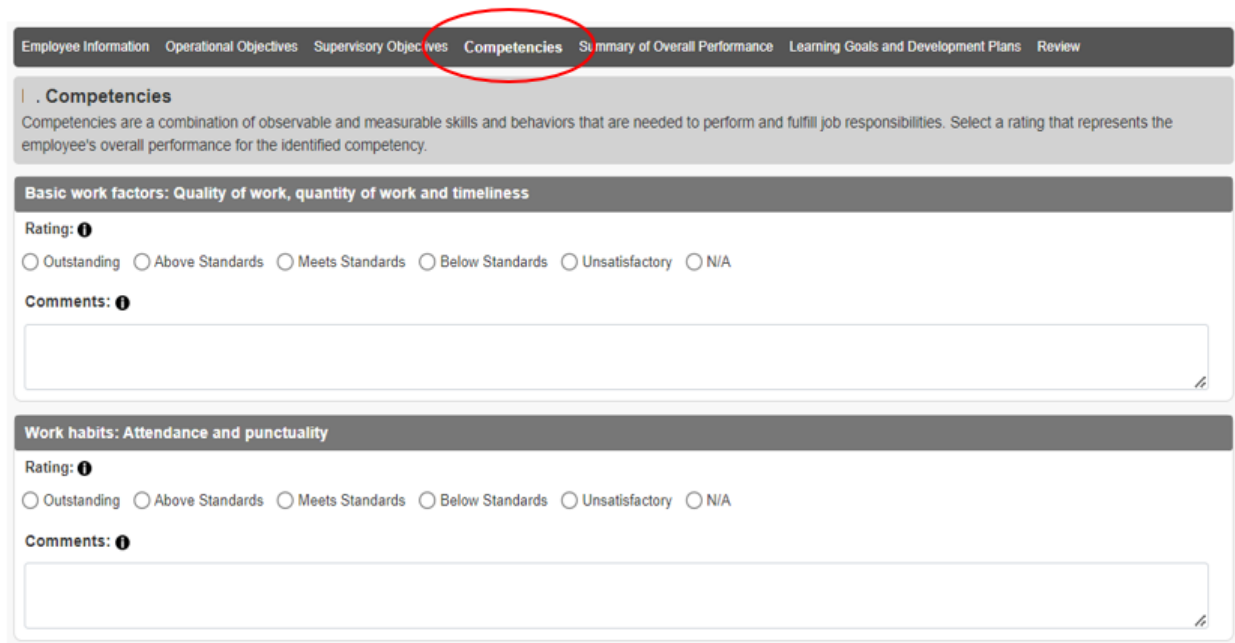
Comments: ⓘ

If the employee was not identified as supervising staff on the Employee Information screen, the Supervisory Objectives screen will not appear for completion. Make corrections to the Employee Information Screen question as needed.

Select “Save Supervisory Objectives” to save entered text and selections.

Competencies

Using the ⓘ icon to access the Performance Management Rating Scale Definitions, select a rating that represents the employee’s overall performance for the identified competency, and insert comments that are fact-based and support the designated rating. A comment must be entered for all ratings aside from “Meets Standards”.



The screenshot shows the 'Competencies' tab selected in the top navigation bar. Below the tab, there is a header section titled 'Competencies' with a description: 'Competencies are a combination of observable and measurable skills and behaviors that are needed to perform and fulfill job responsibilities. Select a rating that represents the employee's overall performance for the identified competency.' The main content area is divided into two sections: 'Basic work factors: Quality of work, quantity of work and timeliness' and 'Work habits: Attendance and punctuality'. Each section has a 'Rating:' label with an ⓘ icon, followed by five radio button options: 'Outstanding', 'Above Standards', 'Meets Standards', 'Below Standards', and 'Unsatisfactory', plus an 'N/A' option. Below the rating options is a 'Comments:' label with an ⓘ icon and a large text input field with a clear button (X) in the bottom right corner.

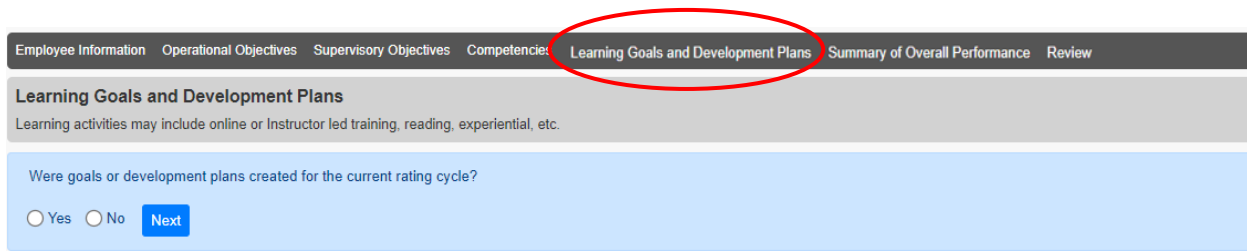
Select “Save Competencies” to save entered text and selections.

Learning Goals and Development Plans

This section indicates the learning goals and development plans that were established at the beginning of the current rating cycle; the employee should have already completed these activities.

If Learning Goals and Development Plans were created for the rating cycle, select Yes.

If Learning Goals and Development Plans were not created in the Planning Phase of the cycle during the prior year, do not create goals or plans now. Select No.



Employee Information Operational Objectives Supervisory Objectives Competencies **Learning Goals and Development Plans** Summary of Overall Performance Review

Learning Goals and Development Plans
Learning activities may include online or instructor led training, reading, experiential, etc.

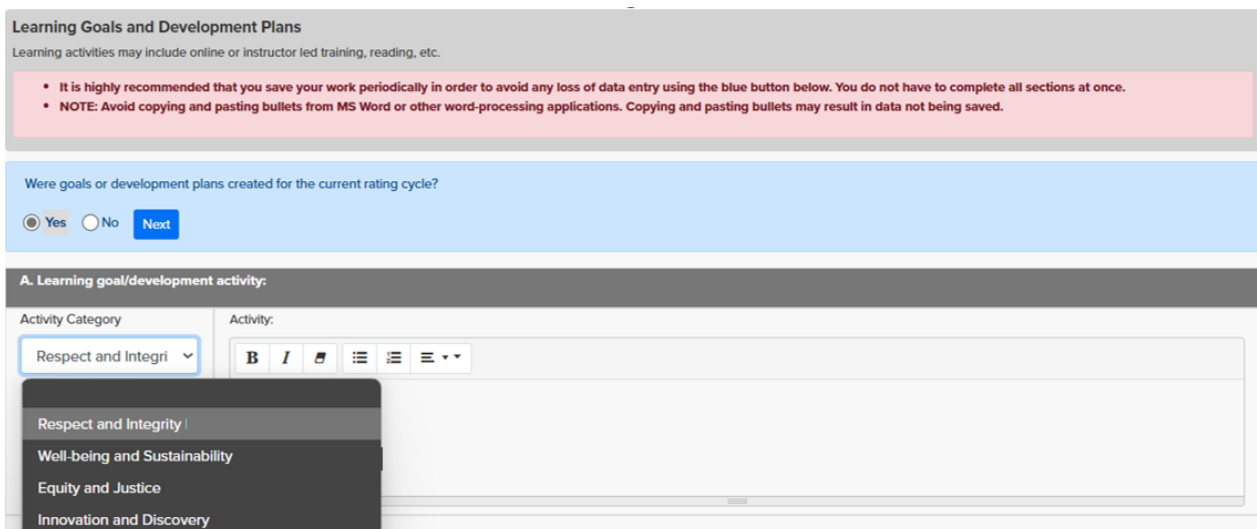
Were goals or development plans created for the current rating cycle?

☐ Yes ☐ No **Next**

If Yes is selected, a Learning Goals/Development Activity subsection will populate for completion. If No is selected, continue to the Review screen.

Using a dropdown field, select a category that most closely applies to each of the activities that were assigned and include a brief description. Development activities are intended to enhance the employee's current performance, prepare for greater challenges and career advancement. Such activities may include:

- Training sessions with senior team members within or in another department
- Assigned courses through e-learning at UMB
- Committee assignment
- Technical improvement courses (i.e. public speaking, business writing)
- Seminars/workshops
- Professional associations



Learning Goals and Development Plans
Learning activities may include online or instructor led training, reading, etc.

- It is highly recommended that you save your work periodically in order to avoid any loss of data entry using the blue button below. You do not have to complete all sections at once.
- NOTE: Avoid copying and pasting bullets from MS Word or other word-processing applications. Copying and pasting bullets may result in data not being saved.

Were goals or development plans created for the current rating cycle?

☒ Yes ☐ No **Next**

A. Learning goal/development activity:

Activity Category: **Respect and Integrity** Activity:

Respect and Integrity
Well-being and Sustainability
Equity and Justice
Innovation and Discovery

Using Rating Scale Definitions located by selecting the ⓘ icon, select a rating that represents the employee's completion status for the assigned goal/development plan.

Select "Save Learning Goals and Development Plans" to save entered text and selections.

Summary of Overall Performance

Select a rating that summarizes the employee's performance in all aspects of the evaluation. Ensure that the overall performance rating is consistent with the individual objective and competency ratings. For example, if "Meets Standards" is selected on each competency, the overall rating cannot be "Above Standards."

All UMB evaluations with an overall rating aside from "Meets Standards" will result in a 2nd Level Reviewer subsection appearing for completion. (Use the ⓘ icon to determine who the 2nd Level Reviewer may be).

The screenshot shows the 'Summary of Overall Performance' section of an evaluation form. It includes a navigation bar at the top with tabs for Employee Information, Operational Objectives, Supervisory Objectives, Competencies, Learning Goals and Development Plans, Summary of Overall Performance, Review, and Print. Below the navigation bar, there is a blue header indicating the evaluation period from April 1, 2024, to March 31, 2025. The main content area is titled 'Summary of Overall Performance' and contains instructions for selecting a rating. A red callout box on the left states: 'A 2nd Level Reviewer is REQUIRED for all Overall Ratings Aside from "Meets Standards"'. A red callout box on the right states: 'Employees Who Receive an Overall Rating Below "Meets Standards" MUST Have a PIP Implemented.'. Below the instructions, there is a section for 'Overall Rating and Comments'. The 'Overall Rating' section has radio buttons for Outstanding, Above Standards, Meets Standards, Below Standards, Unsatisfactory, and N/A. The 'Comments' section has a text area with a rich text editor toolbar. Below the comments section, there is a '2nd Level Reviewer' section with fields for Name, EMPL ID, Email, and Ext. A red callout box at the bottom states: '2nd Level Reviewer Entered Based Upon Overall Rating Requirement'. The 'Save Summary of Overall Performance' button is visible at the bottom left.

Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.

Summary of Overall Performance

Select a rating that summarizes the employee's performance in all aspects of the evaluation (objectives and competencies). Ensure that the overall rating is consistent with the individual objective and competency ratings. For example, if you select "Meets Standards" on each competency, the overall rating cannot be "Above Standards".

For evaluations that had an overall rating of "Below Standards" or "Unsatisfactory", contact Employee Labor Relations within 30 days at 410-706-7302 to implement a Performance Improvement Plan (PIP).

- It is highly recommended that you save your work periodically in order to avoid any loss of data entry using the blue button below. You do not have to complete all sections at once.
- NOTE: Avoid copying and pasting bullets from MS Word or other word-processing applications. Copying and pasting bullets may result in data not being saved.

A 2nd Level Reviewer is REQUIRED for "Overall Ratings" of Outstanding, Above Standards, Below Standards, and Unsatisfactory. ⓘ

Overall Rating and Comments:

Overall Rating: ⓘ

☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A

Comments: ⓘ

B I [Rich Text Editor Icons]

Jane did a great job this cycle.

- You did xxxx.
- You did xxxx.
- You also did xxxxxx xxxxx.

2nd Level Reviewer ⓘ

2nd Level Reviewer Name : Sandra Jessee - Manager, Employee/Labor Rel

2nd Level Reviewer EMPL ID : 012347

2nd Level Reviewer Email : sandra.jessee@umaryland.edu

2nd Level Reviewer Ext : 410 706 7302

Save Summary of Overall Performance

2nd Level Reviewer Entered Based Upon Overall Rating Requirement

Employees Who Receive an Overall Rating Below "Meets Standards" MUST Have a PIP Implemented.

A 2nd Level Reviewer is REQUIRED for all Overall Ratings Aside from "Meets Standards"

Begin typing the 2nd Level Reviewer's name in the first field. The system will populate names for selection based on the text entered.

If the overall rating selected is below "Meets Standards," the supervisor is required to contact Employee Labor Relations, at (410)706-7302 or hrelr@umaryland.edu, to implement a Performance Improvement Plan (PIP) within 30 days of the evaluation meeting.

Select "Save Summary of Overall Performance" to save comments and rating selections.

Review and Signature

The Review section allows for review of the evaluation content before submitting to the next individual in the workflow. Any changes should be made by selecting the associated screen before signing the evaluation.

Employee Information	Operational Objectives	Supervisory Objectives	Competencies	Learning Goals and Development Plans	Summary of Overall Performance	Review	Print
Employees should be evaluated on performance from April 1, 2024 - March 31, 2025.							
Please review the evaluation below.							
Employee Information							
Employee Last Name	Employee First Name	MI	Employee ID#				
Smith	Jane		012335				
Job Title	School/Division	Department					
Specialist, Employee Rel Sr	Administration and Finance	SOM Office of Resource Mgmt					

If the School/Administrative Unit has required a Final Reviewer, a Final Reviewer's name will auto-populate, and supervisors will not have an option to answer the Final Reviewer question. If the Final Reviewer is hardcoded, the supervisor will select the Sign Evaluation button and submit to the next individual in the workflow.

Signatures			
Sunday Jones (Supervisor of Record)			
If you have completed and reviewed the evaluation for Jane Smith , please click on the Sign Evaluation button below. Depending on whether an Other Rating Official and/or 2nd Level Reviewer is identified, the evaluation will be processed accordingly. Note: Please review the evaluation carefully prior to signing. Once signed, others will be able to see the evaluation.			
Does this evaluation need to be reviewed by a Final Reviewer?			
<input checked="" type="radio"/> Yes <input type="radio"/> No			
Reviewer's Name:	Reviewer's Title	Reviewer's Email Address	
Marina Sevdaalis - Specialist, Employee Rel Sr	Specialist, Employee Rel Sr	marina.sevdaalis@umaryland.edu	
Type person's name and select from drop down list			
Sign Evaluation			
Employee signature: my signature below is to verify that I have reviewed this performance evaluation and had the opportunity to discuss the contents with my immediate supervisor or the rating official. Although I am required to sign it, my signature does not imply my agreement or disagreement.			
Employee Comments:			
Employee Name:	Employee Signature:	Employee Title:	Date:
Jane Smith		Specialist, Employee Rel Sr	
Supervisor of Record Name:	Supervisor of Record Signature:	Supervisor of Record Title:	Date:
Sunday Jones		Dir, Employee/Labor Relations	
Other Rating Official:	Other Rating Official Signature:	Other Rating Official Title:	Date:
Lisbet Escobar	N/A	Administrator, EE Rel/Lv Mgmt	
2nd Level Reviewer Name:	2nd Level Reviewer Signature:	2nd Level Reviewer Title:	Date:
Sandra Jessee	N/A	Manager, Employee/Labor Rel	

If the School/Administrative Unit has deemed the question to be optional, use the ⓘ icon to determine who the Final Reviewer may be. If Yes is selected, begin typing the Final Reviewer's name in the first field. The system will populate names for selection based on the text entered.

Once the Final Reviewer's name has been selected, the remaining fields will auto-populate.

Selecting the Sign Evaluation button will submit the evaluation to the next individual in the workflow.

Workflow

The evaluation will route to the next individual in the workflow based on selections in the evaluation screens.

Scenario 1: Evaluation does not require an Other Rating Official, 2nd Level Reviewer, or Final Reviewer

- Once the supervisor completes and signs the evaluation, it will automatically route to the employee.

Scenario 2: Evaluation requires an Other Rating Official but does not require a 2nd Level Reviewer, or Final Reviewer

- Once the supervisor completes and signs the evaluation, the evaluation routes to the Other Rating Official to complete.
- Once the Other Rating Official reviews and signs the evaluation, the evaluation routes directly to the employee.
 - If disagreement exists, a conversation between the Other Rating Official and the supervisor should occur before the Other Rating Official signs. Conversations should occur outside of the tool.
 - If the Other Rating Official adds a comment to the evaluation, it is recommended the individual should include their initials behind the comment to differentiate their addition.
 - If changes are needed, the supervisor should access the evaluation to make changes, and inform the Other Rating Official once complete. The Other Rating Official will then review and sign automatically routing the evaluation to the employee.
- The supervisor will receive an email notification that the employee has been routed the evaluation for awareness.

Scenario 3: Evaluation requires a 2nd Level Reviewer but does not require an Other Rating Official or Final Reviewer.

- Once the supervisor completes and signs the evaluation, the evaluation will route to the 2nd Level Reviewer.
- Once the 2nd Level Reviewer reviews and signs the evaluation, the evaluation routes directly to the employee.
 - If disagreement exists, a conversation between the 2nd Level reviewer and the supervisor should occur before the 2nd Level Reviewer signs. Conversations should occur outside of the tool.
 - If the 2nd Level Reviewer adds a comment to the evaluation, it is recommended the individual should include their initials behind the comment to differentiate their addition.
 - If changes are needed, the supervisor should access the evaluation to make changes, and inform the 2nd Level Reviewer once complete. The 2nd Level Reviewer will then review and sign automatically routing the evaluation to the employee.
- The supervisor will receive an email notification that the employee has been routed the evaluation for awareness.

Scenario 4: Evaluation does not require an Other Rating Official or 2nd Level Reviewer but requires a Final Reviewer.

- Once the supervisor completes and signs the evaluation, the evaluation will route to the Final Reviewer.
- Once the Final Reviewer reviews for consistency with the School/Administrative Unit criteria, the evaluation routes directly to the employee.
 - If disagreement exists, the Final Reviewer should decline the evaluation and a conversation between the Final Reviewer and the supervisor should occur outside of the platform.
 - If changes are needed, the supervisor should access the evaluation to make changes and reroute through the platform. The Final Reviewer will then review and accept routing the evaluation to the employee.
- The supervisor will receive an email notification that the employee has been routed the evaluation for awareness.

Scenario 5: Evaluation requires an Other Rating Official, a 2nd Level Reviewer, and a Final Reviewer.

- Once the supervisor completes and signs the evaluation, the evaluation routes to the Other Rating Official to complete.
- Once the Other Rating Official reviews and signs the evaluation, the evaluation routes directly to the 2nd Level Reviewer.
 - If disagreement exists, a conversation between the Other Rating Official and the supervisor should occur before the Other Rating Official signs. Conversations should occur outside of the tool.
 - If the Other Rating Official adds a comment to the evaluation, it is recommended the individual should include their initials behind the comment to differentiate their addition.
 - If changes are needed, the supervisor should access the evaluation to make changes, and inform the Other Rating Official once complete. The Other Rating Official will then review and sign automatically routing the evaluation to the 2nd Level Reviewer.
- Once the 2nd Level Reviewer reviews and signs the evaluation, the evaluation routes directly to the Final Reviewer.
 - If disagreement exists, a conversation between the 2nd Level Reviewer, Other Rating Official, and the supervisor should occur before the 2nd Level Reviewer signs. Conversations should occur outside of the tool.
 - If changes are needed, the supervisor should access the evaluation to make changes, and inform the 2nd Level Reviewer once complete. The 2nd Level Reviewer will then review and sign automatically routing the evaluation to the employee.
- Once the Final Reviewer reviews and accepts the evaluation, the evaluation routes directly to the employee.
 - If disagreement exists, the Final Reviewer should decline the evaluation and a conversation between the Final Reviewer and the supervisor should occur outside of the platform.
 - If changes are needed, the supervisor should access the evaluation to make changes and reroute through the platform. The Final Reviewer will then review and accept routing the evaluation to the employee.
- The supervisor will receive an email notification that the employee has been routed the evaluation for awareness.

NOTE - The supervisor can make edits until the employee signs off on the evaluation. Once, the employee signs the evaluation, no edits can be made.

Other Rating Officials can add comments when reviewing the evaluation. In order to differentiate the comments, it is recommended that initials are added.

Basic work factors: Quality of work, quantity of work and timeliness

Rating: ⓘ
☒ Outstanding ☐ Above Standards ☐ Meets Standards ☐ Below Standards ☐ Unsatisfactory ☐ N/A Reset Selections

Comments: ⓘ

John xxxxxxxxxxx xxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxxxx xxxxxx (SJ)
Xxxxxxx xxxxxxxx xxxxx xxxxx xxxxxx xxx xxxxx xxxxxxx xxx (LE).

To review the status of the evaluation in the workflow, visit the Dashboard. Supervisors can also push out email reminders to review and sign to the next individual in the workflow.

My Direct Reports Other Rating Official (0) 2nd Level Reviewer (0) Final Reviewer Queue (0) My Evaluations (0)

Evaluation Period: 2024 - 2025

Name	Title	Empl Class	Form or Evaluation Summary	Suprv of Record Completed	Rating Official Completed	Final Reviewer Completed	Final Reviewer Completed	Direct Report Completed	Self-Eval and Oper Objectives and Goals (2025 - 2026)	PIP Reqcd
Jane Smith	Specialist, Employee Rel Sr	Exempt	2024-2025 Annual Eval Form				Pending Lisbet Escobar <button>Send Reminder</button>		2024 - 2025 Self-Eval 2025 - 2026 Operational Obj and Learning and Supplemental Goals (available on 03/11/2025)	N/A

To determine if an Other Rating Official or a 2nd Level Reviewer is in the workflow, supervisors may review the dashboard.

Workflow Signatures

Supervisor of Record: The Supervisor of Record is the direct supervisor of the employee. The Supervisor of Record’s electronic signature is captured when selecting “Sign Evaluation” on the Review screen.

Other Rating Official (if applicable): The Other Rating Official is the designated individual, other than the supervisor of record, who has knowledge of the employee's work and is able to effectively and accurately assess the employee's performance. This individual can objectively contribute to the assessment of the employee's performance for the performance review period. If an Other Rating Official is identified in the evaluation, the evaluation will electronically route to the individual. The Other Rating Official’s signature will be electronically captured once they review the evaluation and select “Sign Evaluation” on the Review screen.

NOTE – The Other Rating Official’s signature must be captured before the evaluation can move forward to the next individual identified in the workflow.

2nd Level Reviewer (if applicable): The 2nd Level Reviewer is typically the next level supervisor in the employee's chain of command or a higher-level supervisor who is responsible for reviewing and approving the performance evaluation to ensure consistency, fairness, and alignment with institutional policies and standards. The 2nd Level Reviewer may also be a specific individual designated by each School/ Administrative Unit. A 2nd Level Reviewer is required when an employee receives an “Overall Rating” other than “Meets Standards” or if a School/ Administrative Unit establishes a requirement for this individual to be included in the evaluation process.

If a 2nd Level Reviewer is identified in the evaluation, the evaluation will electronically route to the individual. The 2nd Level Reviewer’s signature will be electronically captured once they review the evaluation and select “Sign Evaluation” on the Review screen.

NOTE – The 2nd Level Reviewer’s signature must be captured before the evaluation can move forward to the next individual identified in the workflow.

Employee: After the Supervisor of Record has had an opportunity to meet with the employee to review and discuss the content of the evaluation, the employee is able to sign the evaluation electronically. The employee must log into the Performance Management Platform using their UMB ID/Password to sign.

NOTE – Final Reviewers do not have a signature in the evaluation as they are only reviewing the evaluation for compliance with the School/ Administrative Unit’s criteria and guidelines.

Employee Review and Comments

The employee is required to be provided with a copy of the evaluation at least 3 days prior to the scheduled meeting to allow time to formulate any comments and/or questions.

Employees may submit written comments directly in the electronic evaluation form to address any aspect of the evaluation.

NOTE: Employees are able to sign the evaluation once they receive for review, however they may choose to wait to sign until after the evaluation meeting with the supervisor.

Meeting With the Employee

Supervisors are required to meet with the employee to review the evaluation. During this meeting, the supervisor should review and consider the employee's comments and make any changes as necessary.

Once the employee signs off on the evaluation, edits cannot be made.

Refusal to Sign

Should the employee refuse to sign the evaluation, supervisors should explain that signing the evaluation does not imply agreement, it only indicates that they received the document; and that refusing to sign does not invalidate the evaluation.

Employees who disagree with the evaluation are encouraged to leave comments about their disagreement, but still sign off that they have received the evaluation.

If the employee still refuses, supervisors may select a box indicating that the employee refused to sign.

Using this option is a last resort and should be done sparingly.

NOTE – This feature should only be used if an employee states they refuse to sign or uses other similar language.

My Direct Reports Other Rating Official (0) 2nd Level Reviewer (0) Final Reviewer Queue (0) My Evaluations (0)											
Evaluation Period: 2024 - 2025											
	Name	Title	Empl Class	Form or Evaluation Summary	Suprv of Record Completed	Rating Official Completed	Final Reviewer Completed	Final Reviewer Completed	Direct Report Completed	Self-Eval and Oper Objectives and Goals (2025 - 2026)	PIP Req'd
<div><div></div><div>Jane Smith</div></div>	Specialist, Employee Rel Sr	Exempt	2024-2025 Annual Eval Form	<div>✓</div>	<div>✓</div>	<div>✓</div>	Approved Lisbet Escobar	<div>Enter Refusal to Sign</div> <div>Cancel</div> <div>Submit</div>	2024 - 2025 Self-Eval 2025 - 2026 Operational Obj and Learning and Supplemental Goals (available on 03/19/2025)	N/A	

Select employee refused to sign.

Supervisors will type in their name and select submit.

Employee Name	Jane Smith
Performance Evaluation Year	2024 - 2025
Supervisor Name	Sunday Jones
Supervisor Signature	
Witness Name	
Today's Date	05/01/2025
Checkbox/Radios	<input type="checkbox"/> Jane Smith declined to sign their evaluation.
Submit	

Both the supervisor and the employee will receive an email notification regarding the employee's refusal to sign designation.

Submitting the Evaluation

Once the employee electronically signs the evaluation or "declined to sign" is designated, the evaluation is submitted. No changes can be made to the evaluation after this point.

Employees and Supervisors of Record can log into the Performance Management Platform at any time to access the evaluation for review.

Operational Objectives and Learning Goals

After the evaluation phase ends, supervisors should initiate the Planning Phase with their employees. During the Planning Phase, supervisors should meet with their employees to discuss operational objectives and set learning goals to achieve during the plan cycle.

Evaluation Period: 2024 - 2025											
	Name	Title	Empl Class	Form or Evaluation Summary	Supv of Record Completed	Rating Official Completed	2nd Level Completed	Final Reviewer Completed	Direct Report Completed	Self-Eval and Oper Objectives and Goals (2025 - 2026)	RIP Req'd
	Jane Smith	Human Resource Associate 1	Non-Ex	2024-2025 Annual Eval Form	✓	✓	✓	Approved Lisbet Escobar	✓	Self-Eval 2024 - 2025 Operational Obj (0) 2025 - 2026 Learning Goals (0) 2025 - 2026 Supplemental Goals (0)	N/A

To create established operational objectives and learning goals, supervisors will select the “Operational Obj” and “Learning Goals” links from the dashboard.

Once “Operational Obj” has been selected from the dashboard, a new screen will populate for supervisors to complete.

Enter in the Operational Objective. If additional objectives should be added, select the “+ Add Objective” button and enter in additional objectives.

Select “Check Here” and “Submit” to send the employee a notification that the Operational Objectives are available for review or select “Go To Dashboard” to work on the Operational Objectives and submit at a later time.

Once “Learning Goals and Development Plans” has been selected from the dashboard, a new screen will populate for supervisors to complete.

Enter in the Learning Goals and Development Plans. If additional goals should be added, select the “+ Add Goal” button and enter in additional goals.

UMB Performance Evaluation - Learning Goals and Development Plan for Evaluation Year 2025 - 2026

Add Learning Goals below to pre-fill next year's evaluation.

Jane Smith

Learning goal/development activity:

Activity Category: Activity:

Respect and Integrity
Well-being and Sustainability
Equity and Justice
Innovation and Discovery

Remove This Objective

Core Values Updated for Use

Save Learning Goals and Development Plan

Add Goals Here

+ Add Goal

Select “Check Here” and “Submit” to send the employee a notification that the Learning Goals and Development Plans are available for review or select “Go To Dashboard” to work on the goals and submit at a later time.

Once the Learning Goals and Development Plans are sent to the employee, they can electronically confirm they have received a copy.