Evaluation Process

for

Instructors & Administrators

using the

APEX Homeschool Process

Work Flow & Timeline

Step	Online Evaluation Management System Work Flow Action	Responsible Party	Date Due
1	Evaluation Set-up – assigning evaluators	Evaluator	by October 31
2	Employee Self-evaluation – completed & submitted	Instructor	by December 31
3	Evaluation Report – completed & shared	Evaluator	by May 20
4	Evaluation Meeting – scheduled & held	Evaluator	by May 20
5	Employee Response to Evaluation Report Meeting (optional)	Instructor	by May 20
6	Final Acknowledgement of Completion	Supervisor	by June 30

Self-Evaluation

- APEX Homeschool Program Instructors must complete a Self-Evaluation and submit a copy to their evaluator by December 31.

  - Self-evaluation are to be completed and submitted in the Online Evaluation Management System.

- After login to the Online Evaluation Management System, Select "Edit" in the "Personal Evaluation of (employee name) section.

Personal Evaluations of (employee name)

Show [10] entries   Search: [   ]

Eval Period	Status	Position	Department	Assigned To	Action
FY1819	Self-Eval	(position title) (Classified)	(department name)	You	Select → Edit
FY1718	Complete	(position title) (Classified)	(department name)		Download

Showing 1 to 2 of 2 entries   Previous [1] Next

Self-Evaluation (continued)

- When the Continuing Evaluation page opens, scroll down past the Employee Information section to the Performance Accountabilities section.

- Rate each Performance Accountability area (15 total) using the following rating scale:
  – Exceeds Expectations
  – Meets Expectations
  – Does Not Meet Expectations

Self-Evaluation (continued)

- After rating all Performance Accountability areas, scroll down to the Performance Summary and Growth/Goals sections to add comments.

- Select "Submit" when the Self-Evaluation is complete.

Evaluation Report

- Evaluators must complete an Evaluation Report and share it with the APEX Instructor during a meeting by May 20.
  - Evaluation Reports are prepare and submitted to the APEX Instructor in the Online Evaluation Management System.
- After login to the Online Evaluation Management System, Select "View" in the "Staff Evaluations by (evaluator name) section for employees with a status of "In Progress".

Personal Evaluations of (evaluator name)

Show 10 entries   Search:

Eval Period	Status	Position	Department	Assigned To	Action
FY1819	Not Started	(evaluator position) (APT)	(evaluator department name)	(evaluator supervisor)	

Showing 1 to 1 of 1 entries   Previous   Next

Staff Evaluations by (evaluator name)

Showing evaluations for: FY1819   Selected Evals: [ ] Go
Show 10 entries   Search:

	Last Name	First Name	Type	Position	Status	Assigned To	Score/Rating	Action
☐	(employee name)		APT	Supervisor	Not Started	You		View
☐	(employee name)		Classified	(position title)	Not Started	You		View
	(employee name)		Classified	(position title)	Not Started	You		View
☐	(employee name)		Classified	(position title)	Not Started	You		View
	(employee name)		Classified	(position title)	Not Started	You		View
	(employee name)		Classified	(position title)	In Progress	You		Select → View
☐	(employee name)		Classified	(position title)	Not Started	You		View
☐	(employee name)		Classified	(position title)	Not Started	You		View
☐	(employee name)		Classified	(position title)	Not Started	You		View
☐	(employee name)		Classified	(position title)	Not Started	You		View

Showing 1 to 10 of 151 entries   Previous   2   3   4   5   ...   16   Next

* indicates an improvement plan exists for this employee

Evaluation Report (continued)

- When the Continuing Evaluation page opens, scroll down past the Employee Information section to the Performance Accountabilities section.

- Rate each Performance Accountability area (15 total) using the following rating scale:
  - Exceeds Expectations
  - Meets Expectations
  - Does Not Meet Expectations

- Evaluator comments are required for any rating exceeding or not meeting expectations.

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Evaluation Report (continued)

- After rating all Performance Accountability areas, scroll down to the Performance Summary to add evaluator final comments.
  - Prepare Improvement Plan for performance not meeting expectation
- Add comments on goals for the current year and set goal(s) for the upcoming year.
- Select "Submit" when the Evaluation Report is complete.
- Schedule and hold a meeting with APEX Instructor to review the evaluation report.


Performance Summary (please include all significant aspects of this evaluation period)

Employee Self-Evaluation Comments

← Add Evaluator Final Comments

Improvement Plan (for areas not meeting expectations)

Create an improvement plan for this employee. ← Select for Improvement Plan

Growth / Goals (please include goals for year currently being evaluated and for the upcoming year)

Employee Self-Evaluation Comments

← Add Evaluator Comments & Future Growth/Goals

Actions: Delete Evaluation   Cancel   Save Draft   Select →   Submit

Improvement Plans

- Improvement Plans are required for performance areas not meeting expectation.

- After login to the Online Evaluation Management System, the evaluator selects "Improvement Plans" at the top of the evaluator home screen.
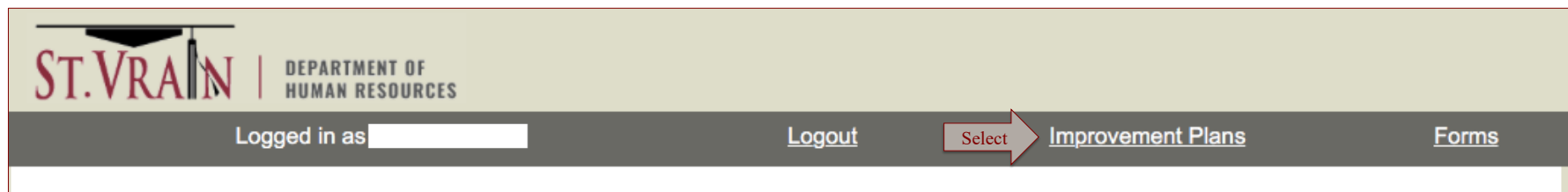
- When the new window opens, the evaluator selects "Create a new plan for FY1819" under the Staff Improvement Plans by (evaluator name) section.
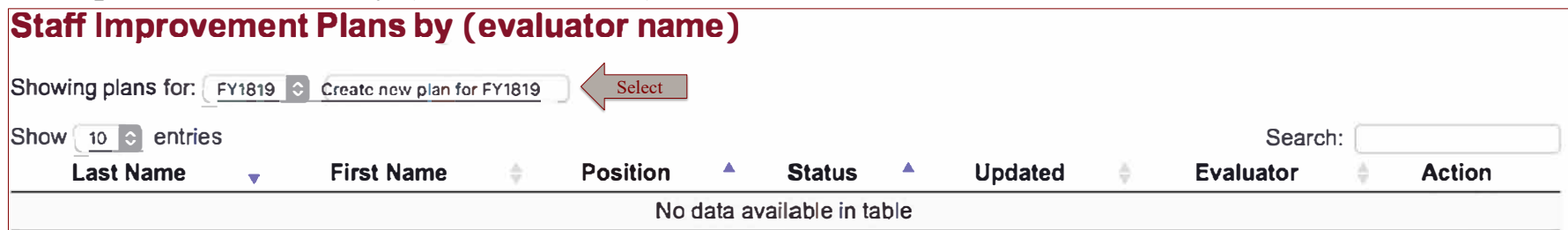
Improvement Plans (continued)

- When the Creating New Plan screen opens, select the employee name from the drop-down menu.
    - The remaining information will populate automatically.

Creating New Plan

Cancel and return to list   Delete Plan   Transfer Plan To:
Autocomplete field   Transfer

Employee Information

Employee Name: ⇕   Select employee from drop-down list.

Employee Department/Building:

Employee Position:

Position Type:

Employee ID:

Employee Username:

Evaluator Name:

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Improvement Plans (continued)

- Scroll down to the Description of Need for Improvement Plan and Improvement Goals and Milestones sections to enter improvement plan information.

Description of Need for Improvement Plan:

Describe the problem(s) with enough depth to satisfy any HR questions

Enter Information

Improvement Goals and Milestones:

* You will still be able to add and remove goals after you have submitted the initial plan.

Select Performance Area from drop-down list and enter goal information

Goal Met?

Performance Area

Describe the goal that needs to be reached for improvement to be a success

Remove

Select to add additional goals

Add additional goal

Select to save plan

Save New Improvement Plan

- Additional performance areas and goals may be added to plan.
- Select "Save New Improvement Plan" when completed.

Improvement Plans (continued)

- Employees have access to Improvement Plans created by their evaluators and will work with their evaluator on completion of the improvement goals.

- After login to the Online Evaluation Management System, the employee selects "Improvement Plans" at the top of the employee home screen.
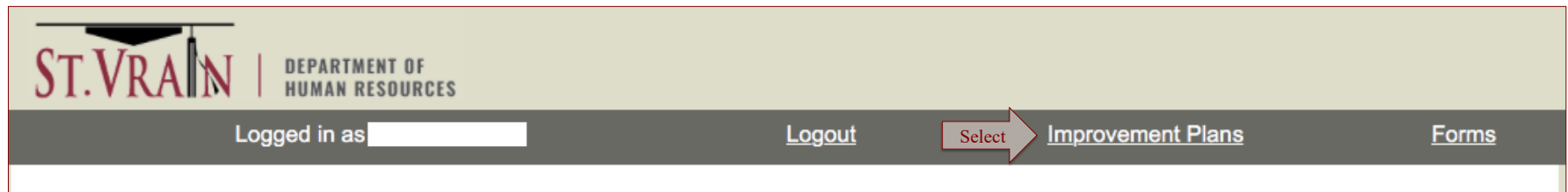
- When the new window opens, the employee selects the plan under the Personal Improvement Plans for (employee name) section.

- The evaluator and employee work together on completion of the improvement goals and record progress in the Online Evaluation Management System.

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Employee Acknowledgement & Response

- The final step in the evaluation process is a required acknowledgement by the employee of receiving and reviewing a copy of the evaluation report.
  - The employee has the option of adding a response and comments to the evaluation report in addition to their acknowledgement.
  - This step is required and must be completed prior to the final work day of the contract year for the employee being evaluated.
- After login to the Online Evaluation Management System, the employee selects "Edit" at the top of the employee home screen.

Personal Evaluations of (employee name)

Show [10] entries   Search: [   ]

Eval Period ▼	Status	Position ▲	Department ▲	Assigned To	Action
FY1819	Meeting Response	position title (Classified)	(department name)	You Select ▶	Edit
FY1718	Complete	position title (Classified)	(department name)		Download

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Employee Acknowledgement & Response

- When the new window opens, the employee scrolls down to review the Evaluation Report, including the evaluator ratings and comments for each Performance Accountability area, the Performance Summary, the Improvement Plan (if applicable), and the Growth/Goals.

- The employee may add their response or comments about the evaluation prior to acknowledging receipt and review of the report.

By submmitting this form, you confirm you have read the evaluation and have met with your supervisor regarding the content

Include any response comments about your evaluation here

Enter optional employee response

Actions: | Delete Evaluation | Cancel | Save Draft | Submit | Select

- The employee must select "Submit" at the bottom of the evaluation report to record their acknowledgement of receiving and reviewing a copy of the evaluation report.
  - The employee acknowledgement is required and only indicates receipt of the report, not necessarily agreement with the ratings, comments or other content.

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Final Acknowledgement of Completion by Evaluation Supervisor

- Evaluation Supervisors must login to the Online Evaluation Management System, select "Acknowledge" next to individual APEX Instructor on the Staff Evaluations list with "Final Acknowledgement" indicated under the Status column to review and provide final acknowledgement of completion of the evaluation.

- After review of the evaluation, the evaluation supervisor will select "Submit" at the bottom of the evaluation report to acknowledge completion of the evaluation process.

- Following final acknowledgement of completion, evaluators and APEX Instructors may download the final evaluation report by selecting "Download" next to the current year evaluation.

- **Deadline for Final Acknowledgement of Completion by evaluation supervisors is June 30th.**

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