

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 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 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

The screenshot shows a web form titled "Continuing Evaluation" with a "Back to list" link. The form is divided into two main sections: "Employee Information" and "Performance Accountabilities".

Employee Information

Employee Department/Building: [department name]
Employee Name: [employee name]
Name change? [Click here to update](#)
Employee Position: [position title]
Position Type: Classified
Employee ID: XXXXXXX
Employee Username: last name, first name
Department Head: [supervisor name]
Department or position change? [Click here to update](#)
Evaluator Name: [evaluator name]
Reviewer Name: [reviewer name]
Final Reviewer: [final reviewer name]

Workflow

Evaluation Setup
[supervisor name] ✓
Employee Self-Evaluation
[employee name] ✕
Evaluation Meeting
[evaluator name] ✕
Employee Response
[employee name] ✕

Actions: [Delete Evaluation] [Cancel] [Save Draft] [Submit]

Employees are required to complete this form or provide a paper copy of their self-evaluation to their evaluator

Performance Accountabilities

	Exceeds Expectations	Meets Expectations	Does Not Meet Expectations
* (performance accountability name & description)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

Annotations: A red arrow points from the "Performance Accountabilities" section of the list to the "Performance Accountabilities" section of the form. Another red arrow points from the "Add 'Optional' Employee Comments" text to the "Comments" field. A red arrow labeled "Select Rating" points to the "Exceeds Expectations" radio button.

Add "Optional" Employee Comments

Select Rating

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.

The screenshot shows a web form with two main sections. The first section is titled "Performance Summary (please include all significant aspects of this evaluation period)" and has a large text input area. A grey arrow labeled "Add Comments" points to the left side of this input area. The second section is titled "Growth / Goals (please include goals for year currently being evaluated and for the upcoming year)" and also has a large text input area. A second grey arrow labeled "Add Comments" points to the left side of this input area. At the bottom of the form, there is an "Actions:" label followed by four buttons: "Delete Evaluation", "Cancel", "Save Draft", and "Submit". A grey arrow labeled "Select" points to the "Submit" button.

Evaluation Report

- Evaluators must complete an Evaluation Report and share it with the APEX Instructor during a meeting by May 20.
 - Evaluation Reports are prepared 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 entries

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: Selected Evals:

Show entries

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)	In Progress	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

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. Add Comments when Required

Continuing Evaluation [Back to list](#)

Employee Information

Employee Department/Building:
 Employee Name:
 Name change? [Click here to update](#)
 Employee Position:
 Position Type:
 Employee ID:
 Employee Username:
 Department Head:
 Department or position change? [Click here to update](#)
 Evaluator Name:
 Reviewer Name:
 Final Reviewer:
 Change Evaluator or reviewer(s): [Edit](#)

Workflow

Evaluation Setup
 ✓

Employee Self-Evaluation
 ✓

Evaluation Meeting
 ✕

Employee Response
 ✕

Actions:

Performance Accountabilities

	Exceeds Expectations	Meets Expectations	Does Not Meet Expectations
(performance accommodation name and description)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employee Self-Evaluation Rating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Evaluator Comments

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.

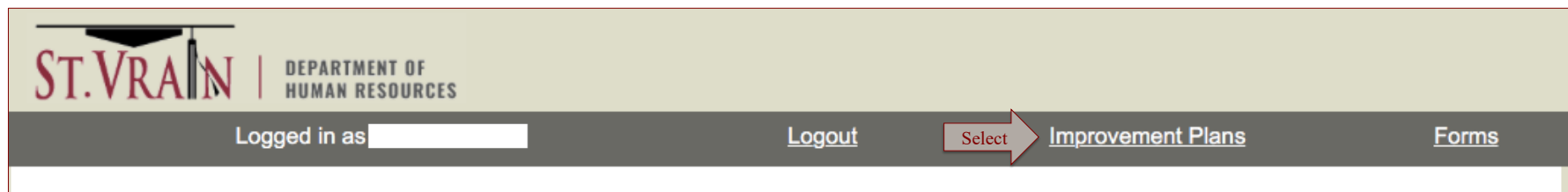
The screenshot displays a web form for an evaluation report, divided into three main sections with red headers:

- Performance Summary (please include all significant aspects of this evaluation period)**: This section contains a text area for "Employee Self-Evaluation Comments" and a larger text area for "Add Evaluator Final Comments".
- Improvement Plan (for areas not meeting expectations)**: This section includes a link "Create an improvement plan for this employee." and a button "Select for Improvement Plan".
- Growth / Goals (please include goals for year currently being evaluated and for the upcoming year)**: This section contains a text area for "Employee Self-Evaluation Comments" and a larger text area for "Add Evaluator Comments & Future Growth/Goals".

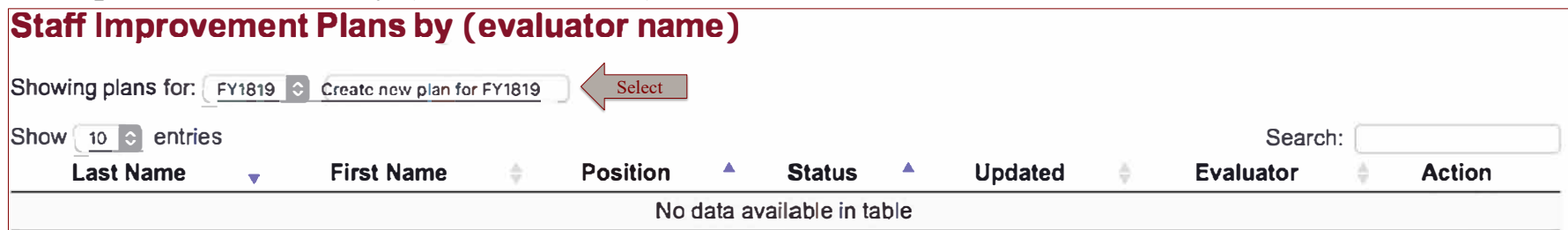
At the bottom of the form, there is an "Actions:" section with several buttons: "Delete Evaluation", "Cancel", "Save Draft", "Select", and "Submit".

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:

Improvement Plans (continued)

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

The screenshot shows a web form for creating an improvement plan. It is divided into two main sections: "Description of Need for Improvement Plan:" and "Improvement Goals and Milestones:".

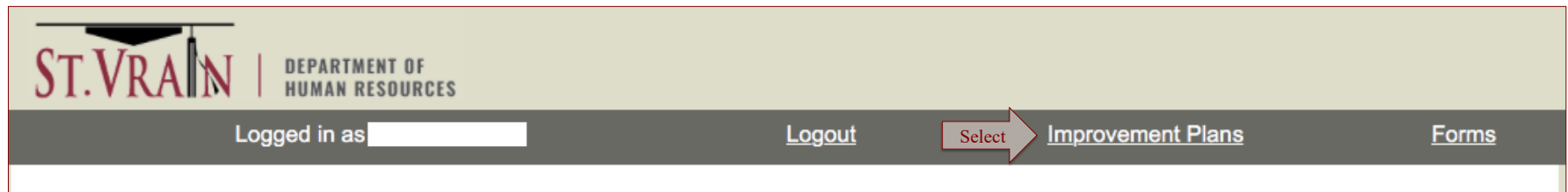
Description of Need for Improvement Plan: This section has a text area with the prompt "Describe the problem(s) with enough depth to satisfy any HR questions". An arrow labeled "Enter Information" points to this text area.

Improvement Goals and Milestones: This section contains a list of goals. A note above the list states: "* You will still be able to add and remove goals after you have submitted the initial plan." Each goal entry includes a "Goal Met?" checkbox, a "Performance Area" dropdown menu, and a text area with the prompt "Describe the goal that needs to be reached for improvement to be a success". Below the list is a "Remove" button and an "Add additional goal" button. An arrow labeled "Select Performance Area from drop-down list and enter goal information" points to the dropdown menu. An arrow labeled "Select to add additional goals" points to the "Add additional goal" button. At the bottom of the form is a "Save New Improvement Plan" button, with an arrow labeled "Select to save plan" pointing to it.

- 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.

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 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

Showing 1 to 2 of 2 entries Previous Next

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.

The screenshot shows a web form interface. At the top, a dark red banner contains the text: "By submitting this form, you confirm you have read the evaluation and have met with your supervisor regarding the content". Below this is a text input field with the placeholder text "Include any response comments about your evaluation here". An arrow from the left points to this field with the label "Enter optional employee response". At the bottom of the form, there is an "Actions:" section with four buttons: "Delete Evaluation", "Cancel", "Save Draft", and "Submit". An arrow from the right points to the "Submit" button with the label "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.

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.**