1. Receive Evaluation Forms from HR
   - Save the forms to your computer.
   - Take the Evaluations for a test drive!
     - If you have any problems opening the forms, entering data, using the dropdowns, etc., contact Human Resources.
   - Have there been significant changes to the employee’s primary duties? If so, request a current job description from Human Resources to edit.

2. Complete Your Evaluations
   - Refresh your evaluation completion skills! See Quick Tips and FAQ’s.
   - Evaluation Period: January - December, 2020
   - Employees hired after October 1 will not receive an evaluation because they were still in their "Initial evaluation period."
   - Consider whether to include suggested goals or to ask the employee to bring proposed goals when you meet.
   - Need more assistance? Contact Human Resources.

3. Schedule Evaluation Meetings
   - Schedule the evaluation meeting - allow sufficient time for discussion.
   - Send the employee a copy of the evaluation a couple of days prior to the evaluation meeting.
   - If an employee’s evaluation includes some Unsatisfactory ratings, discuss this situation with your supervisor prior to meeting with the employee.

4. Evaluation Meetings
   - Encourage open and honest discussion.
   - Verbally review the University’s Core Values with the employee, noting them as the basis for all activities and programs at Southwestern University.
   - Review the evaluation with your employee.
   - Ask the employee if there have been any significant changes to their primary responsibilities – note them on the job description.
   - Avoid spending too much time on any one item.
   - Keep the meeting on track.

5. The Completed Evaluation
   - Ask if the employee is ready to sign their evaluation or if they wish to add comments.
   - Sign and forward the evaluation and any amended job descriptions to your supervisor for review and approval.
   - Send the fully reviewed and approved evaluations to the Human Resources department for further processing by April 30, 2021.

End Date: April 30, 2021

Need assistance? Call Human Resources at ext. 1435.