UMOR Staff Performance Online Evaluation System
March 2021

Where to access the online performance evaluation system
Access the online system at https://reviews.engin.umich.edu.

Dates and deadlines
- The online performance evaluation system is accessible beginning April 1, 2021.
- Staff should plan to complete self-evaluations by the end of May.
- Meetings/conversations with supervisors should take place in June and July.
- All staff reviews, including supervisors' evaluations, are to be completed in the online system by July 31.
- Instructions and deadline information associated with this year's merit program will be sent at a later date when information about the University's salary program becomes available.

Contact with questions and/or changes to staff data
Contact Patricia Smith (pssmith@umich.edu) with questions about policies and procedures or if you notice staff data that needs to be changed in the online system.

Basic elements of the staff performance evaluation process
Every employee is reviewed each year. This review is required for merit increase determinations.

The review process includes:
- Assessment of performance in specific categories, including supervisory skills if applicable.
- Update on prior year goals.
- Goals for the upcoming year.
- Discussion of strategies to address barriers/challenges.
- Discussion of employee career goals and professional development opportunities.
- In-person meeting between supervisor/reviewer and employee.
- Both supervisory and employee electronically sign the review.

Instructions for Staff
- Click on "Categories Explained" for category descriptions and/or "Ratings Defined" for definitions and examples.
- Click on "Work on My Review" to access your performance self-evaluation form.
- The goals for FY21 that you listed on your 2020 performance evaluation will automatically populate.
- Complete the "Progress report on last year's goals" section. Provide an update on the

progress of each of your FY21 goals. Was the goal met? If not, why? Include any other comments that you would like to share.

- Complete the "Proposed future goals" section by listing goals for FY22.
- Complete the "Barriers and challenges" section by discussing the training, tools or support you may need to achieve your goals. Discuss potential obstacles.
- Complete the "professional development and diversity" section by providing a description of any professional development opportunities you have completed and describe what steps you have taken in the past year to include the principles of diversity, equity and inclusion into your work life.
- You will be required to confirm that you are aware of and comply with the U-M policies and guidelines related to conflicts of interest/commitment and felony conviction disclosure.
- You may attach an optional supporting statement to provide your supervisor with any additional information you may wish to convey. This statement will not be incorporated into the print-out of your final evaluation and will not be sent to University records.
- When you are ready to submit your self-evaluation to your supervisor, click "Finalize." You will no longer be able to submit changes to your self-evaluation after clicking "Finalize."
- Notify your supervisor that you have completed your self-evaluation in the online system.

Instructions for reviewers/supervisors
- Click on "Categories Explained" for category descriptions and/or "Ratings Defined" for definitions and examples.
- Click on "My Reviews in Progress" to see the list of all of your staff to be reviewed.
- Click "Edit" in the box to the right of each staff member's name to bring up the individual review.
- Evaluate the staff member in each category. The default ratings are set at "Proficient." You may comment on each category, but comments are mandatory if "Not Meeting Expectations" or "Approaching" are selected.
- Indicate if FY21 goals and objectives were met (No, Partially, or Yes).
- Evaluate the success of current year goals and objectives by adding comments in the Goals and Objectives for FY21 field.
- Add comments and/or responses to employee's Goals and Objectives for FY22.
- Add comments and/or responses to employee's notes regarding requirements for achieving goals.
- Be sure to SAVE often, and especially before leaving the page. You can save and return to the reviews as needed.
- As needed, print PDFs of staff input and of your reviews in progress.
- After you have met with your employee and agreed to the final version, you must log-in to confirm and submit. Once you've confirmed and submitted, no further edits can be made. Both supervisor and employee should log in separately to indicate agreement with the final version by clicking the Confirm and Submit buttons. Your reviews will be electronically submitted to central HR by UMOR HR.

Helpful Hints about the Online Tool

- Access the online performance evaluation system at https://reviews.engin.umich.edu.
- Save your responses often. Or type your text in MS Word and copy/paste into the online performance review system.
- Limit your responses to 2,500 characters.
- After you select "finalize" you will no longer be able to edit your responses.
- For policy or procedural questions, contact your supervisor or Patricia Smith (pssmith@umich.edu).