

# Supervisor Instructions for Completing the Performance Appraisal Form

## TO START

- Access the form on iCobb. Save the blank document to your computer. To begin each new appraisal, open your blank document, choose SAVE AS and use the employee name in the title. Remember to save periodically as you complete the form to avoid losing information.
- Important – The form you are using should say “2016 Cobb County Performance Appraisal” at the top. If it does not, you are not using the current version of the form.

## EMPLOYEE INFORMATION

- To auto-fill the employee information, place the cursor in the *Employee ID* field and begin typing the six-digit employee ID number. A menu box will appear with like numbers (the numbers may appear as orange or red). Keep typing until the correct number appears. Click on the correct employee ID number to select it and the employee’s information will auto-fill. (See Figure 1)
- If you do not have the ID number, place the cursor in the *Employee Name* field, enter a few letters of the employee’s first or last name, and double-click on the correct name when it appears on the menu box (the names may appear as orange or red).
- Information that does not auto-fill may be typed in.

The screenshot shows the top portion of a performance appraisal form. At the top right, there is a field labeled "HR USE ONLY- OVERALL RATING" with a greyed-out input box. Below this is a dark blue header bar with the text "COBB COUNTY PERFORMANCE APPRAISAL" in white. Underneath the header is a light blue bar labeled "EMPLOYEE INFORMATION". The form contains several input fields: "Employee ID" with the value "00" and a search box containing "028008" and "002052"; "Employee Name" with a dropdown menu showing "Employee ID"; "Job Title" and "Date of Employment" with empty input boxes; and "Department Number" and "Department Name" with empty input boxes.

Figure 1

## RATING INFORMATION

- Type in the requested information, including dates of progress discussions for the year.
- Notes from progress discussions are not kept on this form. Keep progress discussion notes in a separate document for your review.

## EVALUATION FACTORS & COMMENTS

- For each of the nine (9) job factors, select **one** rating by clicking in the appropriate box.
- Include brief comments to support, clarify or demonstrate why the selected rating was chosen. (See Figure 2)
- Click on *Add Row* as necessary to include more comments. Remember to save as you complete the comments to avoid losing information.
- **Do not** select a rating for Leadership/Supervision if the employee is not in a supervisory or management position.

The screenshot shows a web-based form titled "EVALUATION FACTORS". Under the heading "Job Knowledge", there is a description: "(Demonstrates Knowledge of all phases of work, assigned department and relevant County policies and procedures)". Below this, four rating options are listed with corresponding checkboxes: "Does Not Meet Requirements", "Needs Improvement", "Meets Requirements", and "Exceeds Requirements". A text input field is provided for comments, with the instruction "Provide at least one example of how this ability is demonstrated." To the right of the input field are two buttons: "Add Row" and "Delete".

Figure 2

### RATING DEFINITIONS:

**No Response – (Leaving the rating blank)** Acceptable when there is no applicable use for this job factor in the employee’s position. For example, it is acceptable to leave the rating blank on the Leadership/Supervision job factor for an employee who has no supervisory or management responsibilities. A blank rating may also be acceptable if the employee is new to the position, however, an explanation to this effect should be made in the comment section.

**Exceeds** - The employee CONSISTENTLY performed above and beyond expected or required standards in this job factor. The employee is considered to be the subject matter expert in this job factor and required little to no supervision while completing this job factor throughout the evaluation cycle. **Note:** Carefully consider the employee’s true performance before assigning this rating. Do not allow personality to overshadow performance, resulting in an inaccurate (too high or too low) rating.

**Meets** - The employee performed up to expected or required standards in this job factor. The employee required little to average supervision while completing this job factor throughout the evaluation cycle.

**Needs Improvement** - The employee performed below expected or required standards in this job factor. The employee required more than average supervision while completing this job factor throughout the evaluation cycle.

**Does Not Meet** – The employee does not meet the expected or required standards for this job factor. The employee required constant supervision to complete this job factor.

**CURRENT YEAR GOALS**

- Consider the employee’s progress on current goals. Answer yes or no as appropriate. If the answer is no, briefly explain why and what steps are being taken to address the lack of progress.

CURRENT GOALS AND OBJECTIVES		
Progress Acceptable?	Type Goal below (If you selected "no" for progress unacceptable, please explain why?)	Add Row
Progress Acceptable?	Type Goal below (If you selected "no" for progress unacceptable, please explain why?)	Add Row
<input type="checkbox"/> Yes <input type="checkbox"/> No		Delete

Figure 3

**FUTURE GOALS**

- Include 3 to 5 primary goals for the employee to complete in the coming year. Avoid listing routine tasks unless the task is significant to the employee’s performance standards. For example, “Answer the telephone” or “Assist customers” are routine tasks. “Answer 90% of calls within 3 rings” is a goal with a measurable standard.

FUTURE GOALS		
(Type Goal, Description and Completion Date)		Add Row
Goal	Completion Date	
		Delete

Figure 4

## OVERALL RATING

- Review all of the job factor ratings and goal completion to select one overall rating for the evaluation period. Include brief relevant comments as necessary. If the employee began his or her employment within 90 days of the end of your department’s rating period, you may give an overall rating of “New Employee.”
- Performance plans are required with overall ratings of **Does Not Meet** or **Needs Improvement**. You may do so by either of the following (either option is acceptable):
  - Attach the document(s) to the Appraisal. Instructions on how to do so can be viewed by clicking the red or light blue buttons.
  - Use the *Email Backup Doc to HR* button. This option will open an email and prompt you to send the documents as a separate email.

OVERALL RATING COMMENTS	
OVERALL PERFORMANCE RATING	
Does Not Meet Requirements	Needs Improvement
Meets Requirements	Exceeds Requirements
New Employee (Under 90 days employment)	
<input type="checkbox"/>	<input type="checkbox"/>
Performance plans must be included with overall ratings of "Does Not Meet" or "Needs Improvement".	
Please list any significant achievements or accomplishments for this employee during this rating period	Add Row
	Delete
Please list any disciplinary actions during this rating period	Add Row
	Delete
FOR SHERIFF'S OFFICE USE ONLY	
GCIC- Security and Integrity Training	Completed <input type="checkbox"/> Date of Completion <input type="text"/>
	Not Completed <input type="checkbox"/>
Upload/Email disciplinary actions taken that are relevant to the employee's performance:	<a href="#">EMAIL BACKUP DOC TO HR</a>
<i>USE THIS OPTION IF YOU ONLY HAVE ADOBE READER XI&gt;&gt;&gt;</i>	<a href="#">ADOBE READER XI ATTACH</a>
<i>USE THIS OPTION IF YOU HAVE ADOBE PRO&gt;&gt;&gt;</i>	<a href="#">ADOBE PRO UPLOAD DOC</a>

Figure 5

## SIGNATURES

- Sign the form and obtain additional signatures as necessary. Note: **If an electronic signature needs to be created, click in the signature box and follow the online wizard to create a signature.**
- To forward the form to the employee, click the *Send to Employee* button and enter the employee’s email address. **Note:** The supervisor should sign the form before sending to

the employee. The supervisor signature **locks** the form, preventing any changes to the content. (See Figure 6)

- The employee can use an electronic signature OR simply initial in the space provided. Once the employee signs and/or makes comments, the employee clicks *Submit to Supervisor* to return the form to the supervisor. This form can also be printed and signed by the employee if necessary.
- Upon return from the employee, click *Submit for Approval* to forward the form to other raters and/or for upper management approval. Each approver should use the drop down box that says *Please Use Signature* to select the appropriate option. If no other approval is required, see next bullet.
- The last person to approve (Department Head for example) clicks *Submit to Department Representative* and enters the appropriate email address.
- Each time a submit button is clicked and the form is emailed, it will populate the subject with the employee’s ID number and the rating. **Do not change the subject.** (See Figure 7)

<b>Send to Employee</b>	
<b>EMPLOYEE COMMENTS &amp; ACCEPTANCE</b>	
<b>Employee Comments</b>	Add Row
	Delete
Employee Signature	Date
If you are unable to create a digital signature please initial below for completion:	
	<b>Submit to Supervisor:</b>

<b>DEPARTMENT HEAD &amp; SUPERVISOR APPROVAL</b>	
PLEASE CHOOSE SIGNATURE	Date
<small>SIGNAME1</small>	<b>Submit for Approval:</b>
PLEASE CHOOSE SIGNATURE	Date
	<b>Submit for Approval:</b>
PLEASE CHOOSE SIGNATURE	Date
<b>Submit to Department Representative</b>	
<b>Submit to HR for Filing</b>	

Figure 6

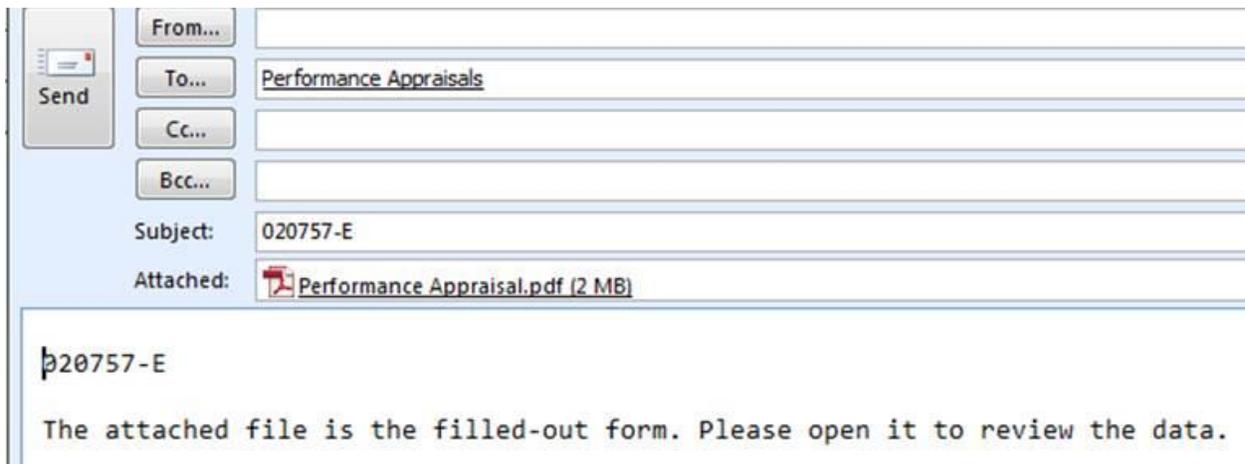


Figure 7

### **SUBMISSION TO HUMAN RESOURCES**

- Department HR Representatives should process the completed, signed form as follows:
  1. Click *Submit to HR for Filing* button to e-mail the form to [performance.appraisals@cobbcounty.org](mailto:performance.appraisals@cobbcounty.org).
  2. The email subject will automatically populate to be the employee's 6 digit ID number, a dash, and the rating code (example: 008960-E). If it does not, or the subject has been altered in any way, please change it to be the correct format. Please note that there are no spaces between the employee ID number and the dash. (See Figure 7)
  3. Rating codes are:
    - DOES NOT MEET REQUIREMENTS – U
    - NEEDS IMPROVEMENT – N
    - MEETS REQUIREMENTS - M
    - EXCEEDS REQUIREMENTS - E
    - NEW EMPLOYEE (TOO NEW TO RATE) - T
  4. If the form is printed and scanned, it should also be emailed with the subject format above.
  5. Each appraisal should be submitted/emailed individually as stated above. Do not attach multiple appraisals to one email.
  6. Hard copies do not need to be submitted to the Human Resources Department.

### **QUESTIONS**

For general questions or more information, contact Glenda Valentine at 770-528-2633 or Jami Mack at 770-528-2635. For questions about emailing the completed form, contact Aleah Hawks at 770-528-2540.