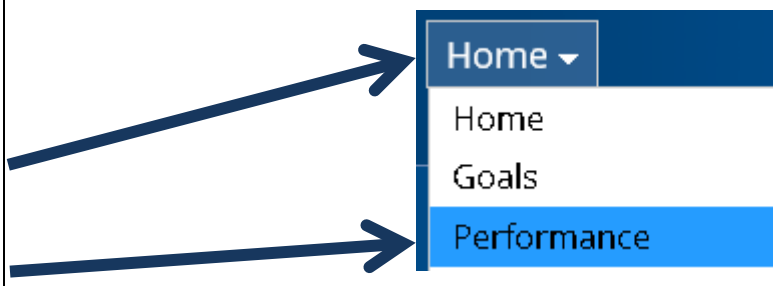
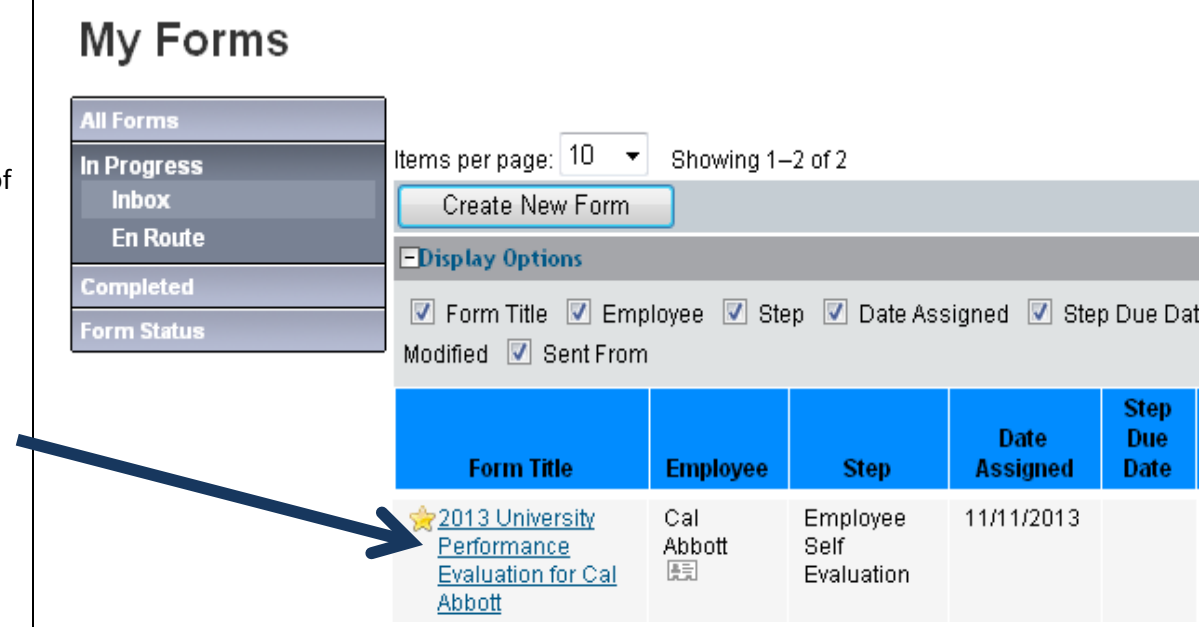
UK Online PE System – Completing the Online PE for Employees

This guide focuses on the steps employees need to take to complete the Online PE process. Accessing the UK Online PE System and basic navigation are covered in prior user guides. To access these guides, visit the Resources tab on the HR Performance Matters webpage: http://www.uky.edu/pe/resources-training-materials

PE forms are not available year-round. PE forms are generated and released one to two months before the PE due date. For Campus employees, the release date is in mid-December; for UK HealthCare employees, the release date is in May.

Accessing your Performance Evaluation Form

On your **Home** page, in the **Navigation Menu**, • Click on **Home**, • Then choose the **Performance** option	
On your **Performance** page, your PE form can be found in the **Inbox** of the **In Progress** section. • Click on the link in the **Form Title** column to access your PE form	

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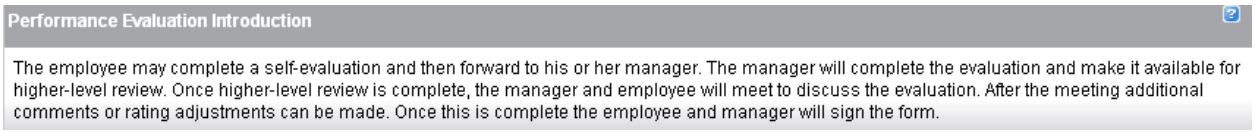
Completing the PE Process – Progress Line and Introduction

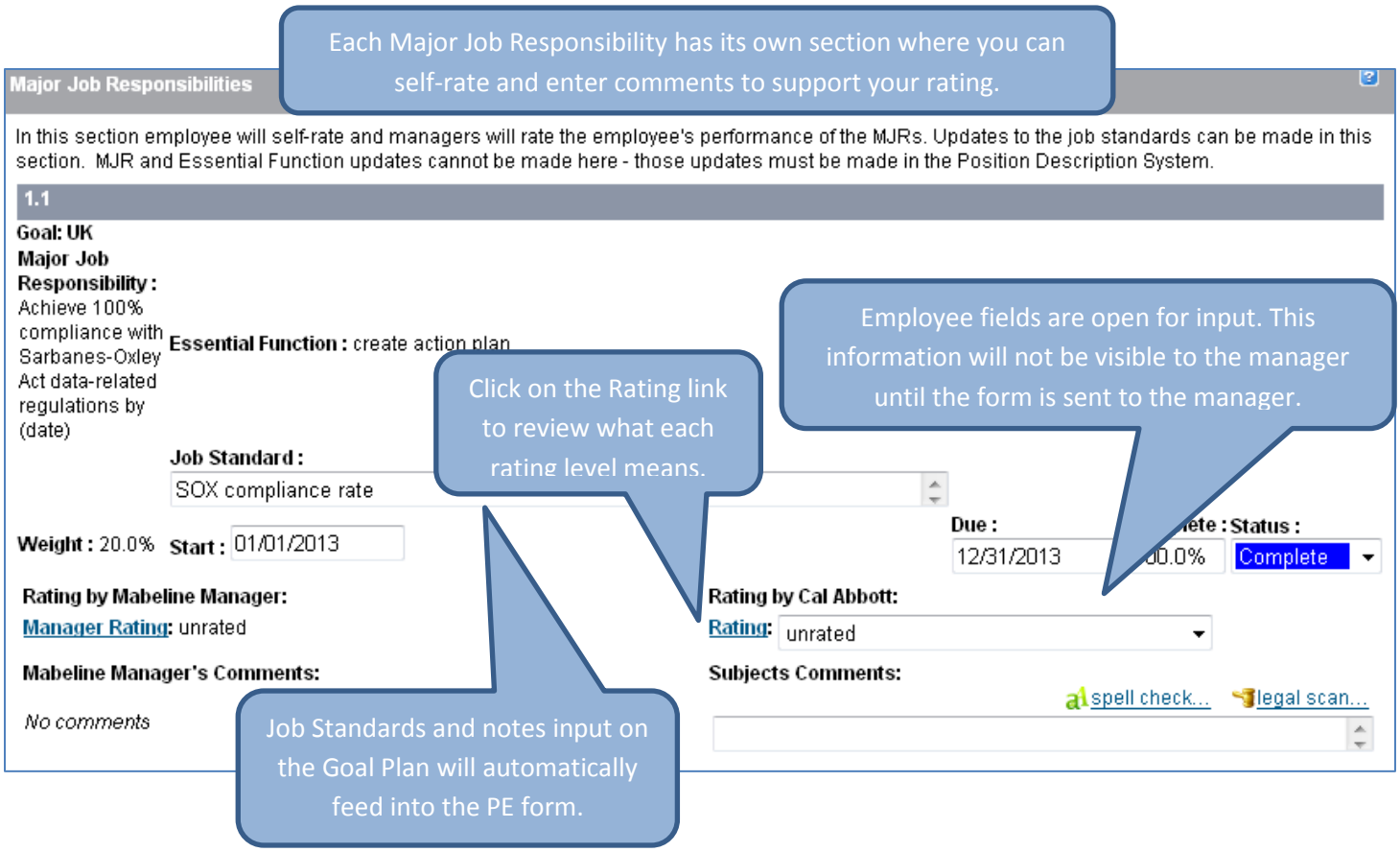
After accessing the PE form, at the top of the page, you can view the progress line. This gives you a quick update of which step the PE form is currently in.

There is also an introduction that explains the process from beginning to end.



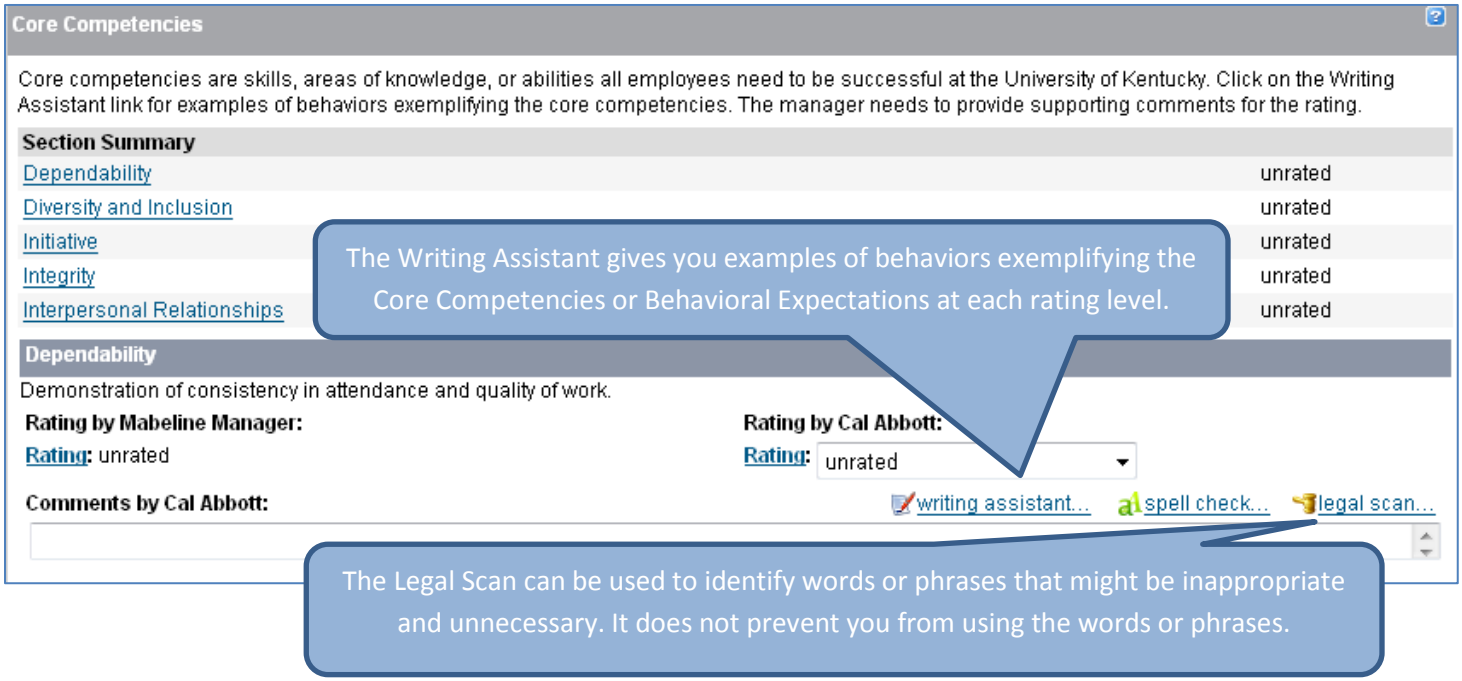
Completing the PE Process - Step One: Employee Self Evaluation

The PE form in the UK Online PE System starts with an Employee Self Evaluation. If you choose not to complete a self evaluation, the PE form still needs to be sent to your manager so the PE process can advance. Per University policy, the self evaluation is optional unless your manager or department makes it mandatory.

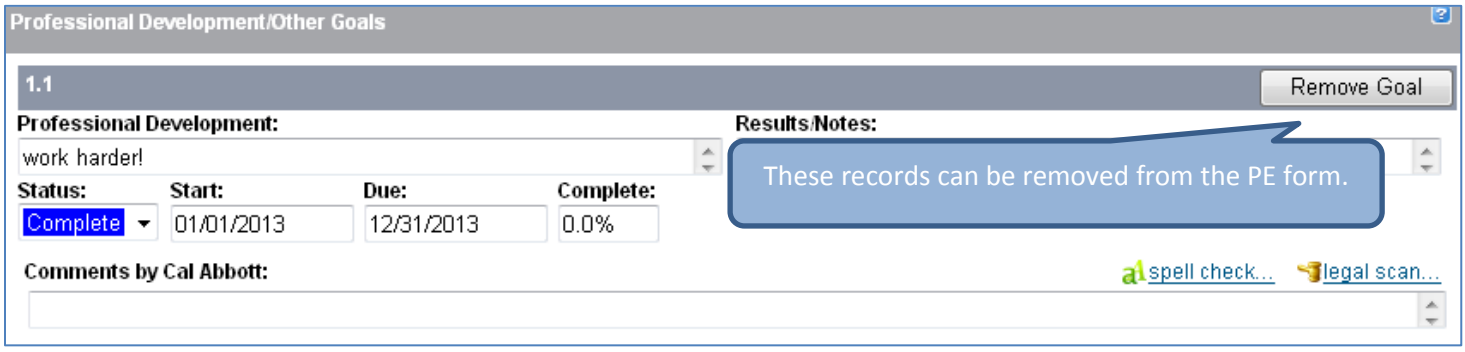


Completing the PE Process - Step One: Employee Self Evaluation, continued

Below the MJR sections, you will find the Core Competencies (University / Campus employees) or Behavioral Expectations (UK HealthCare employees). These can be rated on a 1 to 3 level and are not included in the overall PE score, unless you are UK HealthCare Leadership.



Any professional development goals entered on the Professional Development Goal Plan will be included at the bottom of the PE form. There are no rating fields for these goals as they are not included in the overall PE score.



	The PE form can be saved at any time by clicking on the **Save** button at the top of the screen.
Save and Close	The PE form can also be saved and closed to allow for multiple work sessions. To do this, click on the **Save and Close** button at the bottom of the screen.
Send to Manager	The employee sends the PE form to their manager by clicking on the **Send to Manager** button which is at the top and bottom of the PE form. ***After the Legal Scan, there is a second, confirmation step that must be completed before the form is sent to the manager.***

Completing the PE Process - Step Two: Manager Review

After you send the PE form to your manager, it is now time for the manager to input their ratings and comments related to your performance. The information entered by the manager in this step is not viewable by you at this time.

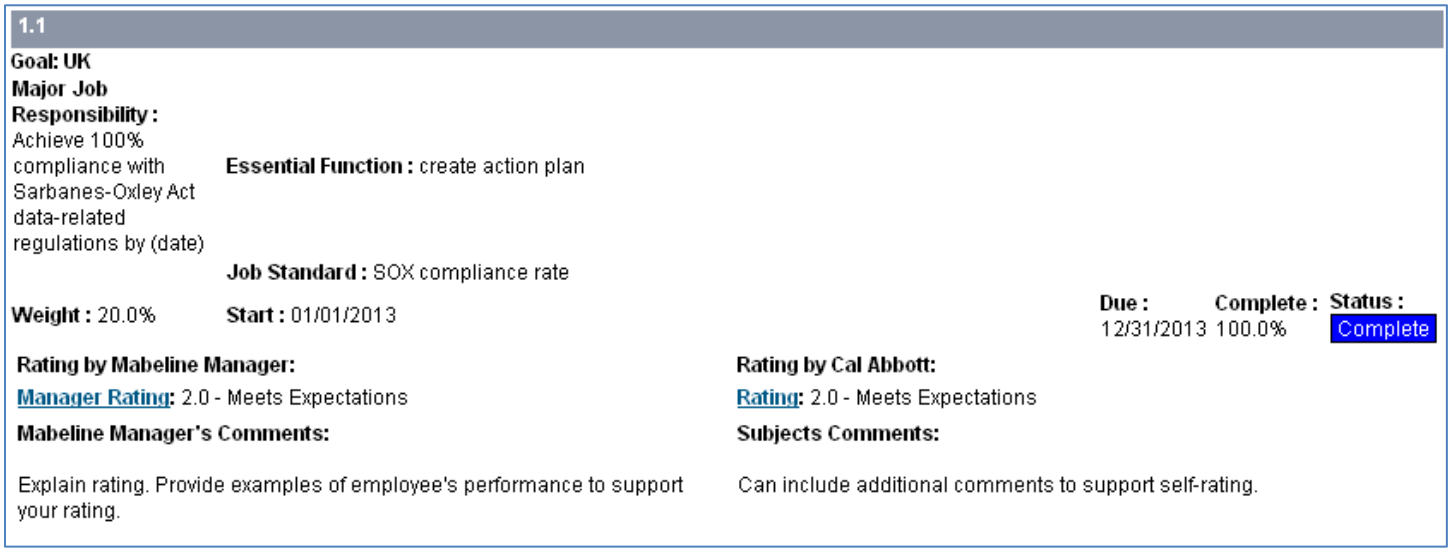
Completing the PE Process - Step Three: 1:1 Meeting

The PE form is parked at the 1:1 Meeting step until the face-to-face meeting between you and the manager has occurred. While the form is in this step:

- Upper-level management can review PE forms for employees in their direct reporting line
- Employees cannot view any rating or comments entered by their manager
- Managers can make edits to their fields on the PE form based on information gained during the face-to-face meeting with the employee

Completing the PE Process - Step Four: Employee Signature

In this step, you can view the completed PE form, seeing the manager's ratings and comments, methods of evaluation, and the overall PE rating. These fields are now locked and no changes can be made.


1.1

Goal: UK Major Job Responsibility : Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)

Essential Function : create action plan

Job Standard : SOX compliance rate

Weight : 20.0% **Start :** 01/01/2013

Due : 12/31/2013 **Complete :** 100.0% **Status :** Complete

Rating by Mabeline Manager:

Manager Rating: 2.0 - Meets Expectations

Mabeline Manager's Comments:

Explain rating. Provide examples of employee's performance to support your rating.

Rating by Cal Abbott:

Rating: 2.0 - Meets Expectations

Subjects Comments:

Can include additional comments to support self-rating.

Completing the PE Process - Step Four: Employee Signature – continued

Methods of Evaluation

Please select from the following Methods of Evaluation that will be used in evaluating the employee's performance. Additional methods of evaluation and/or additional explanations of those methods may be added if necessary.

- [x] Supervisory Observation - Supervisor evaluates the employee's performance by direct observation of work
- [x] Third Party Feedback - Supervisor evaluates the employee's performance by in part based on relevant feedback from outside customers, vendors, or others
- [ ] Peer Feedback - Supervisor evaluates the employee's performance in part based on relevant feedback from the employee's peers
- [x] Spot Checks - Supervisor evaluates the employee's performance in part based on random spot checks of work
- [ ] Sampling Statistics - Supervisor evaluates the employee's performance in part based on sample's of the employee's work or statistical data that indicates the employee's level of work of demostrated competence
- [x] Project Results - Supervisor evaluates the employee's performance in part based on actual results of projects or assignments the employee has managed or participated in
- [ ] Self Report - Supervisor evaluates the employee's performance in part based on the employee's own evaluation of his/her work

Other

Summary

Ratings for each MJR and Core Competency are listed here. The overall rating is calculated from the MJR scores. The Core Competency ratings are not calculated into the overall rating. Professional Development goal results are also included but not rated. Overall comments on the employee's performance can be entered in this section.

Calculated Form Overall Rating **2.4 / 4.0**

	Rating
Major Job Responsibilities	**2.4** / 4.0
Achieve 100% compliance with Sarbanes-Oxley Act data-related regulations by (date)	2.0 - Meets Expectations

Overall Comments

Comments by Mabeline Manager:
Add summary of employee's performance.

You can read any comments or performance summary that was entered by your manager.

Signature

The electronic signature belows represent your acknowledgement of this form.

Employee: _____
Cal Abbott

Manager: _____
Mabeline Manager

Your signature acknowledges the one-to-one conversation has taken place and the PE form has been reviewed. Your signature does not necessarily mean you agree with the content of the PE form.

Section Comments:

Comments by Cal Abbott: spell check... legal scan...

Save and Close | Close Without Saving | Sign | Mabeline Manager

You now have the opportunity to add final comments of your own.

Click on the **Sign** button to electronically sign the PE form and send it to your manager.

Completing the PE Process - Step Five: Manager Signature

After you sign your PE form and send it to your manager, they will have the opportunity to add any final comments they have. They will then sign the PE form to complete the process.

Viewing Your Completed PE Form

To view your completed PE form, go to your **Performance** page, click on the **Completed** section,

- Click on the link in the **Form Title** column to view your completed PE form