

1. **Manager** evaluates employee's competencies.
2. **Manager** shares evaluation with employee.
3. **Employee** reviews and acknowledges performance evaluation.

Manager & Employee have a review meeting to discuss evaluation (occurs outside of Connect).

4. **Employee** enters evaluation comments.
5. **Manager** provides final comments.

Note: The Probationary/Trial performance evaluation is a back-and-forth process between the employee and manager. This guide illustrates the processes for both roles in sequential order to provide a complete understanding of the entire probationary evaluation process.

The Probationary/Trial Evaluation document is automatically generated in Connect 30 days after the new hire or transfer date.

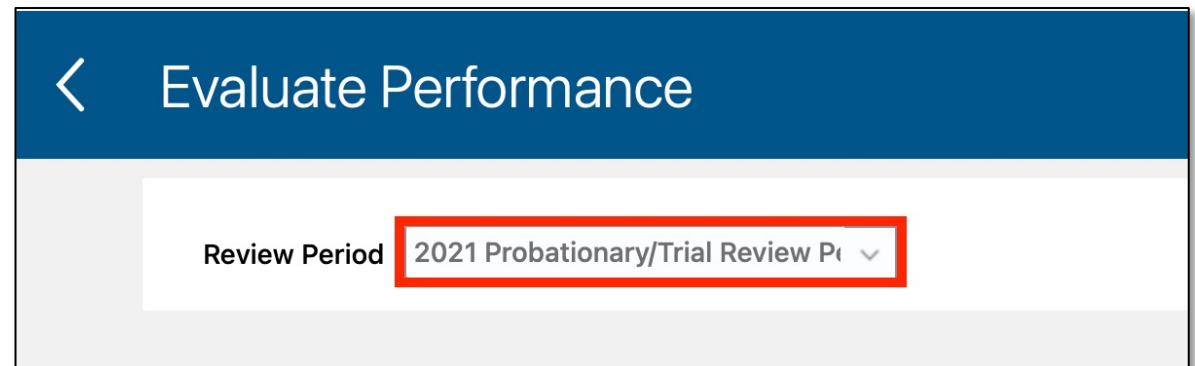
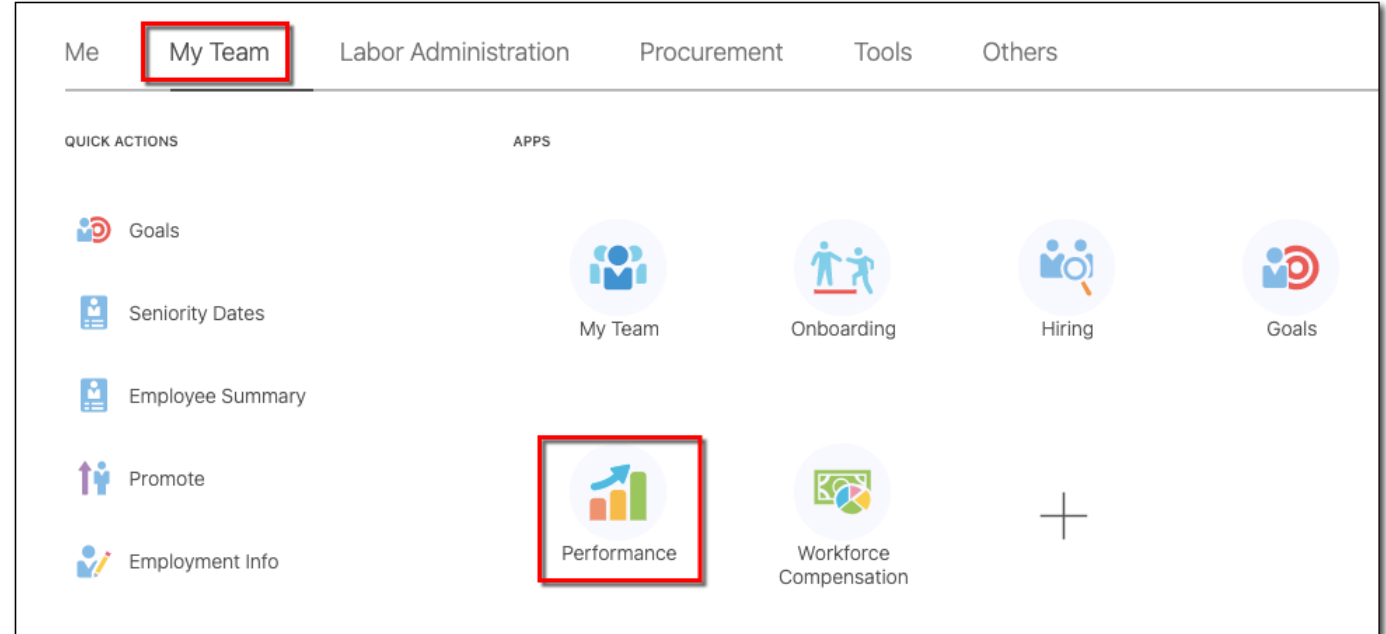
1. Manager evaluates employee

1. Manager Evaluates Employee

1. Click **My Team** to display your manager functions.

2. Click the **Performance** icon.

3. Select **Probationary/Trial Review Period**.

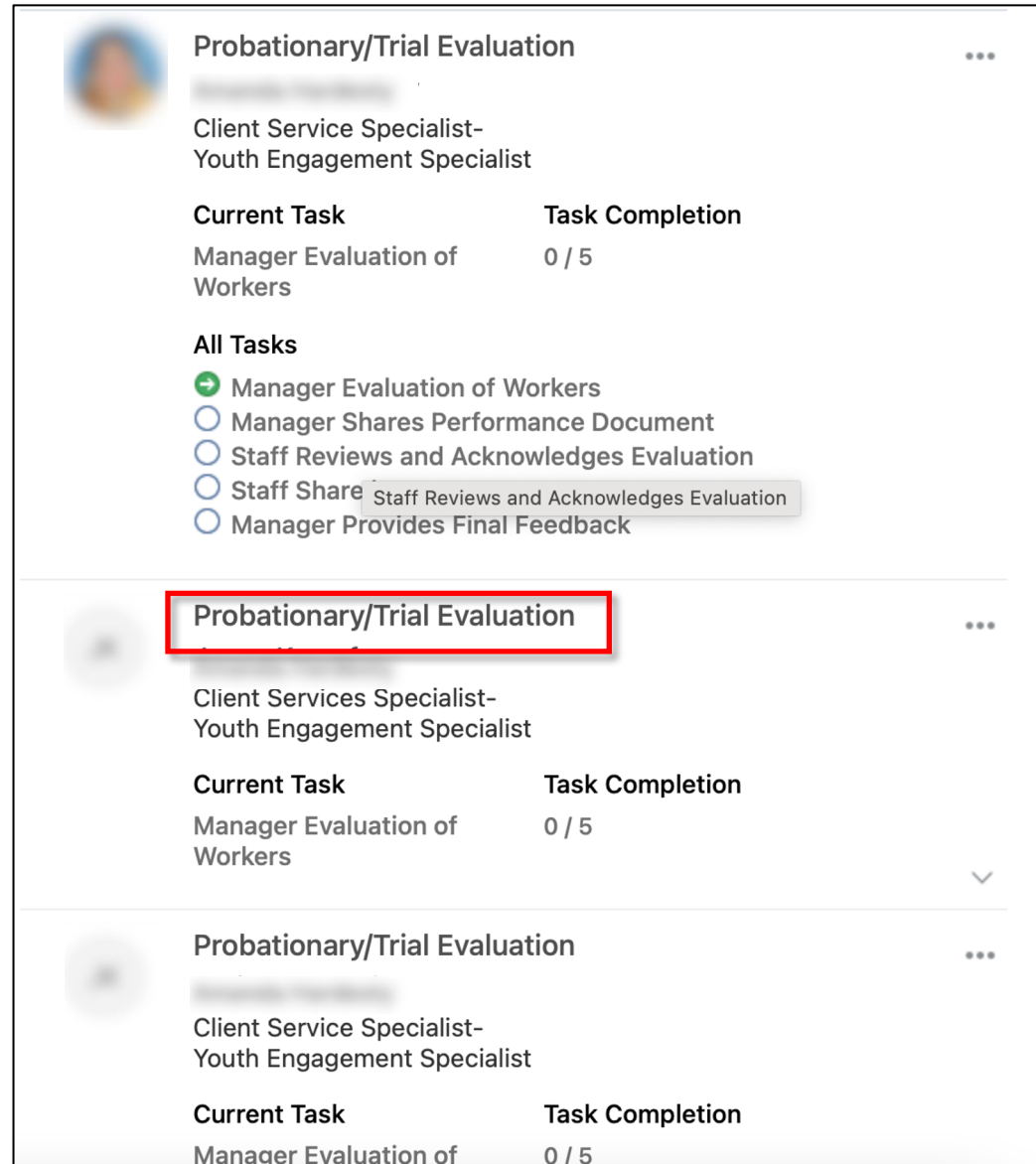


4. Use the **Search Person** field, **filters**, or **scroll** to locate the employee who is being evaluated.

Note: Connect displays the current task to be completed and where you are in the overall evaluation process.

Note: The Probationary/Trial Evaluation document is automatically generated 30 days after the new hire or transfer date.

5. Click **Probationary/Trial Evaluation** link for the desired employee.



The screenshot displays a list of evaluation documents for a specific employee. The first document is highlighted with a red box. Below it, the details of the evaluation process are shown.

Probationary/Trial Evaluation

Client Service Specialist-
Youth Engagement Specialist

Current Task	Task Completion
Manager Evaluation of Workers	0 / 5

All Tasks

- ☒ Manager Evaluation of Workers
- ☐ Manager Shares Performance Document
- ☐ Staff Reviews and Acknowledges Evaluation
- ☐ Staff Share
- ☐ Manager Provides Final Feedback

The second document in the list is also titled "Probationary/Trial Evaluation" and shows the same task completion status.

6. Click the **Evaluate** button to evaluate the employee's **Competencies**.

Evaluation Topics

Competencies

0 of 9 rated | 0 of 9 commented

Manager Rating

☆☆☆☆☆

Manager Comments

Evaluate

8. When finished, click **Save and Close**.

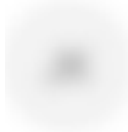


The screenshot shows the top navigation bar of the Canvas LMS interface. It includes icons for Home, Favorites, Flags, Notifications (with a badge showing '2'), and a profile dropdown menu. Below the navigation bar, there are two buttons: 'Print' and 'Submit'. The 'Submit' button is highlighted with a red rectangular border.

9. Click the **Submit** button.

Note: When finished, Connect will display the **Current Task**, number of **Tasks Completed**, and where you are in the overall process.

Note: You can click the **up/down arrow** to minimize or maximize this view.



Probationary/Trial Evaluation

Client Services Specialist-
Youth Engagement Specialist

Current Task	Task Completion
Manager Shares Performance Document	1 / 5

Manager Rating

★★★★★

All Tasks

- ☒ Manager Evaluation of Workers
- ☒ Manager Shares Performance Document
- ☐ Staff Reviews and Acknowledges Evaluation
- ☐ Staff Share input
- ☐ Manager Provides Final Feedback



2. Manager shares evaluation with employee

Note: You can share your evaluation with the employee as soon as the previous step was completed or at a later date.

1. In either scenario, locate the employee whose evaluation is being shared, and click **Probationary/Trial Evaluation**



Probationary/Trial Evaluation

Client Services Specialist-
Youth Engagement Specialist

Current Task	Task Completion
Manager Shares Performance Document	1 / 5

Manager Rating

★★★★★

All Tasks

- ☒ Manager Evaluation of Workers
- ☒ Manager Shares Performance Document
- ☐ Staff Reviews and Acknowledges Evaluation
- ☐ Staff Share input
- ☐ Manager Provides Final Feedback

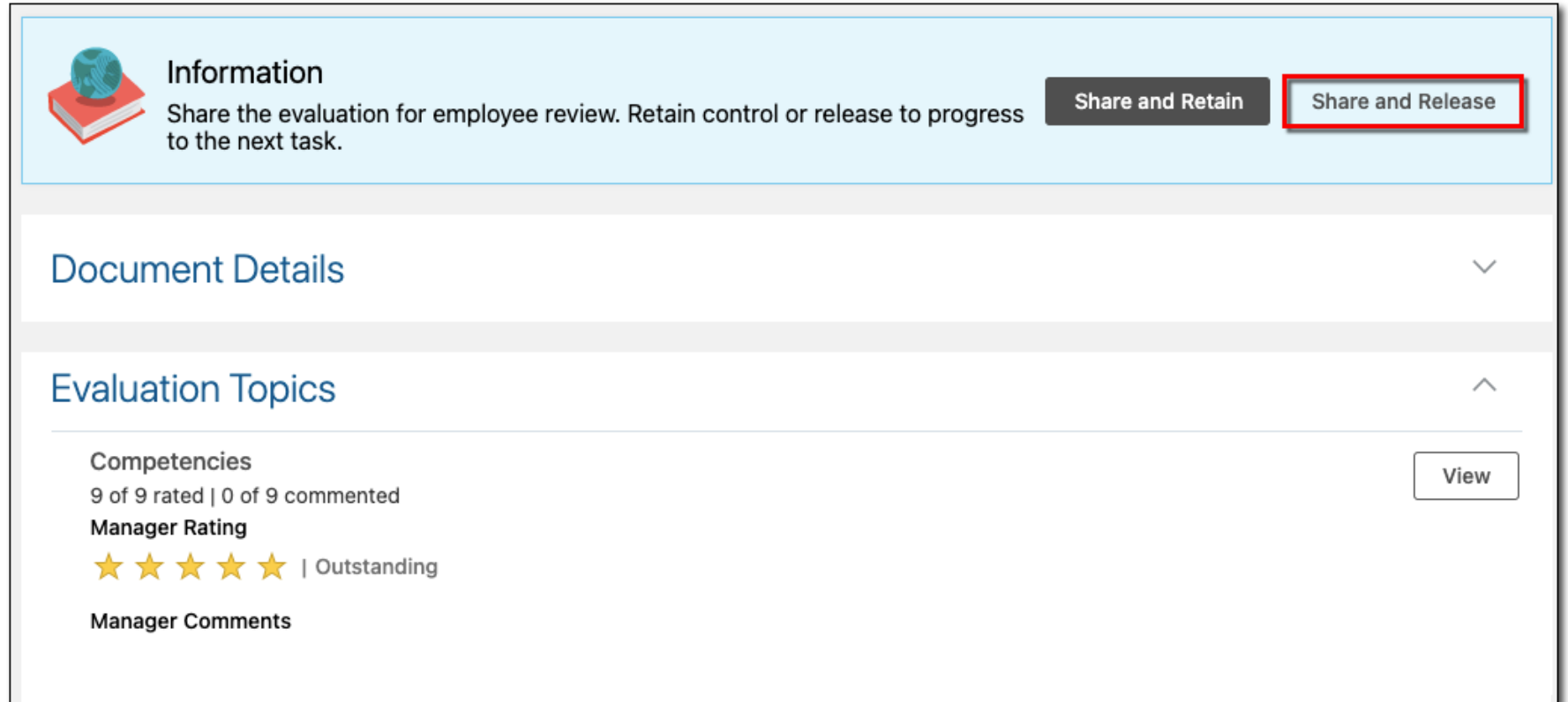
4. Manager Shares Evaluation with Employee

2. Review the evaluation as needed.

3. Click **Share and Release**.

Note: Share and Release locks the evaluation from further editing and shares the final version with the employee for review and to acknowledge receipt.

Note: Share and Retain allows the employee to review the evaluation but not acknowledge receipt.

A screenshot of a web application interface for sharing an evaluation. At the top, there's a light blue header bar. On the left, a red book icon with a globe on top is next to the word 'Information'. To the right of this, text says 'Share the evaluation for employee review. Retain control or release to progress to the next task.' Further right are two buttons: 'Share and Retain' (dark grey) and 'Share and Release' (white with a red border). Below the header is a section titled 'Document Details' with a downward arrow. Underneath is 'Evaluation Topics' with an upward arrow. This section contains 'Competencies' (9 of 9 rated | 0 of 9 commented), 'Manager Rating' (5 stars | Outstanding), and 'Manager Comments'. A 'View' button is on the right side of the 'Manager Rating' section.

Information
Share the evaluation for employee review. Retain control or release to progress to the next task.

Share and Retain **Share and Release**

Document Details

Evaluation Topics

Competencies
9 of 9 rated | 0 of 9 commented

Manager Rating
★★★★★ | Outstanding

Manager Comments

View

4. Manager Shares Evaluation with Employee

4. Enter your **Comments**.
5. Click the **Submit** button.

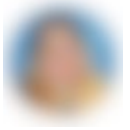
Note: When finished, Connect will display the **Current Task**, number of **Tasks Completed**, and where you are in the overall process.

and Release

Comments

Tahoma 2 B I U 

Please review and acknowledge receipt of this evaluation.



Probationary/Trial Evaluation

Client Services Specialist-
Youth Engagement Specialist

Current Task	Task Completion
Staff Reviews and Acknowledges Evaluation	2 / 5

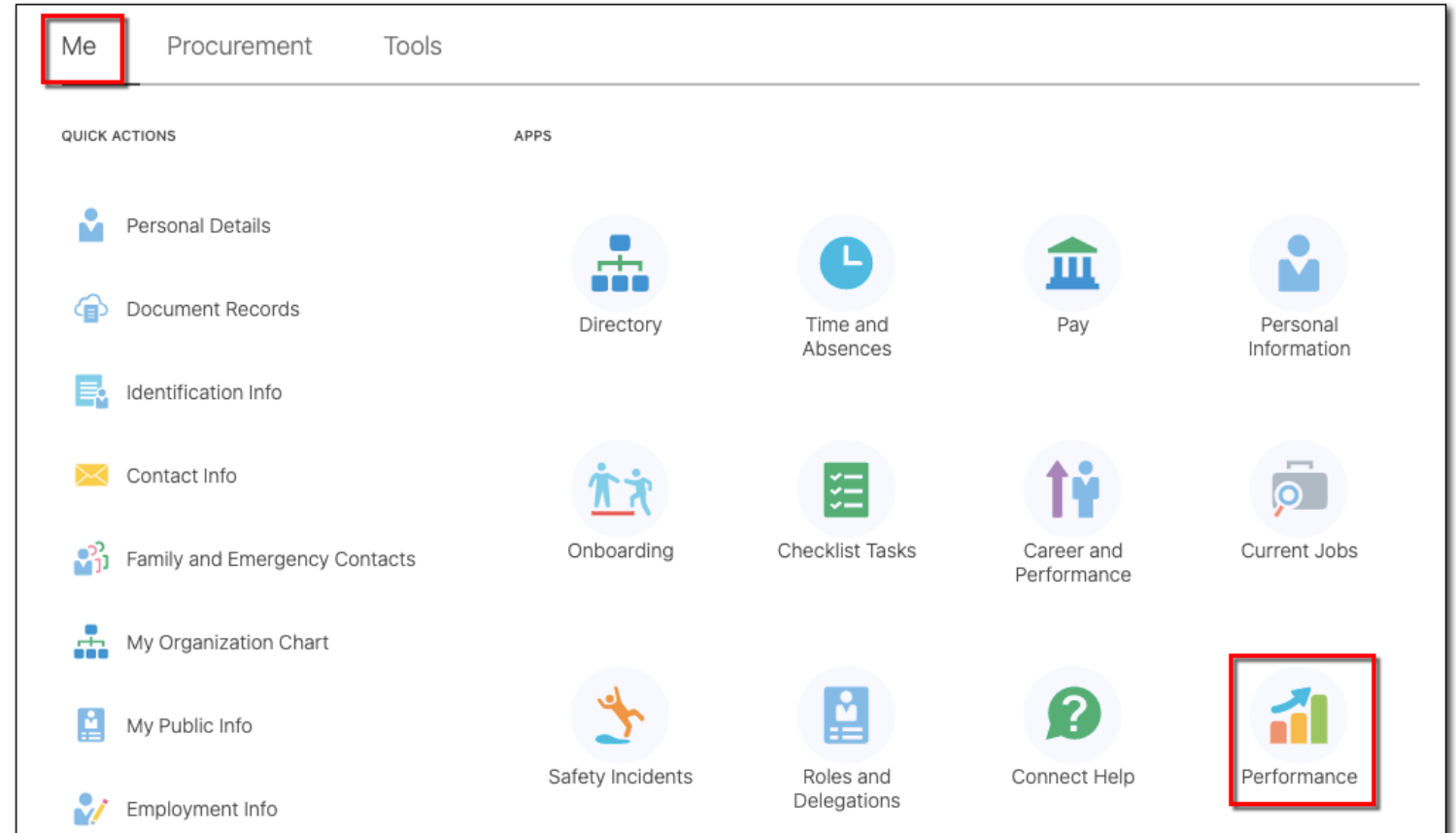
Manager Rating
★★★★★

All Tasks

- ☒ Manager Evaluation of Workers
- ☒ Manager Shares Performance Document
- ☒ Staff Reviews and Acknowledges Evaluation
- ☐ Staff Share input
- ☐ Manager Provides Final Feedback

3. Employee reviews and acknowledges evaluation

1. Select **Me** to display your employee functions.
2. Click the **Performance** icon.



Note: Connect displays the current task to be completed and where you are in the overall evaluation process.

3. Click **Probationary/Trial Evaluation**.

Review Period
2021 Probationary/Trial Review Period

Performance Documents

All

Probationary/Trial Evaluation
★★★★★ |

Current Task
Staff Reviews and Acknowledges Evaluation

Task Completion

2 / 5

All Tasks

- ✓ Manager Evaluation of Workers
- ✓ Manager Shares Performance Document
- ➔ Staff Reviews and Acknowledges Evaluation
- Staff Share input
- Manager Provides Final Feedback

4. Click the **View** button to view the manager evaluation ratings for **Competencies**.

Evaluation Topics

Competencies

Manager Rating

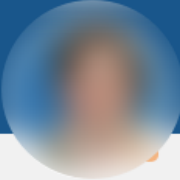
★★★★★ | Outstanding

Manager Comments

View

Attachments

5. Review all **manager ratings** and **comments**.
6. When finished, click the **back arrow** to return to the **Acknowledgement** page.

Evaluated Topic Competencies

Ratings and Comments

Accountability

Acceptable attendance, punctual, and practices confidentiality.

Manager Rating

★★★★☆ | Exceeds Standards

Manager Comments

Exceeds standards.

Employee Comments

I was on time and had no absences this year.

Show Additional Info

Employee Rating

★★★★☆ | Meets Standards

Communication

Practices effective verbal communication, written communication, non-verbal communication and customer service.

Manager Rating

★★★★☆ | Meets Standards

Manager Comments

Meets standards.

Employee Comments

Employee Rating

★★★★☆ | Meets Standards

7. Click **Acknowledge Document**.



Information

Review the evaluation details shared by your manager and acknowledge receipt.

Acknowledge Document

Document Details

Evaluation Topics

Competencies

View

Manager Rating

★

★

★

★

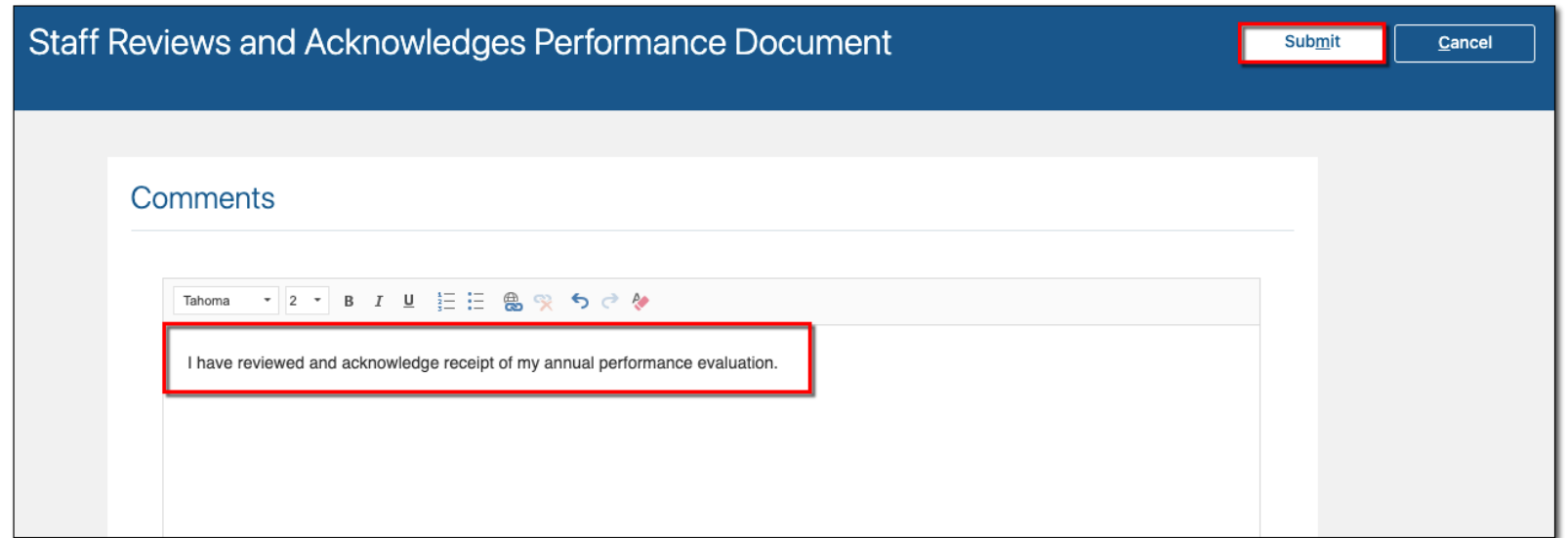
★

| Outstanding

Manager Comments

8. Enter your **Comments**.

9. Click the **Submit** button.



Staff Reviews and Acknowledges Performance Document

Submit Cancel

Comments

Tahoma 2 B I U       

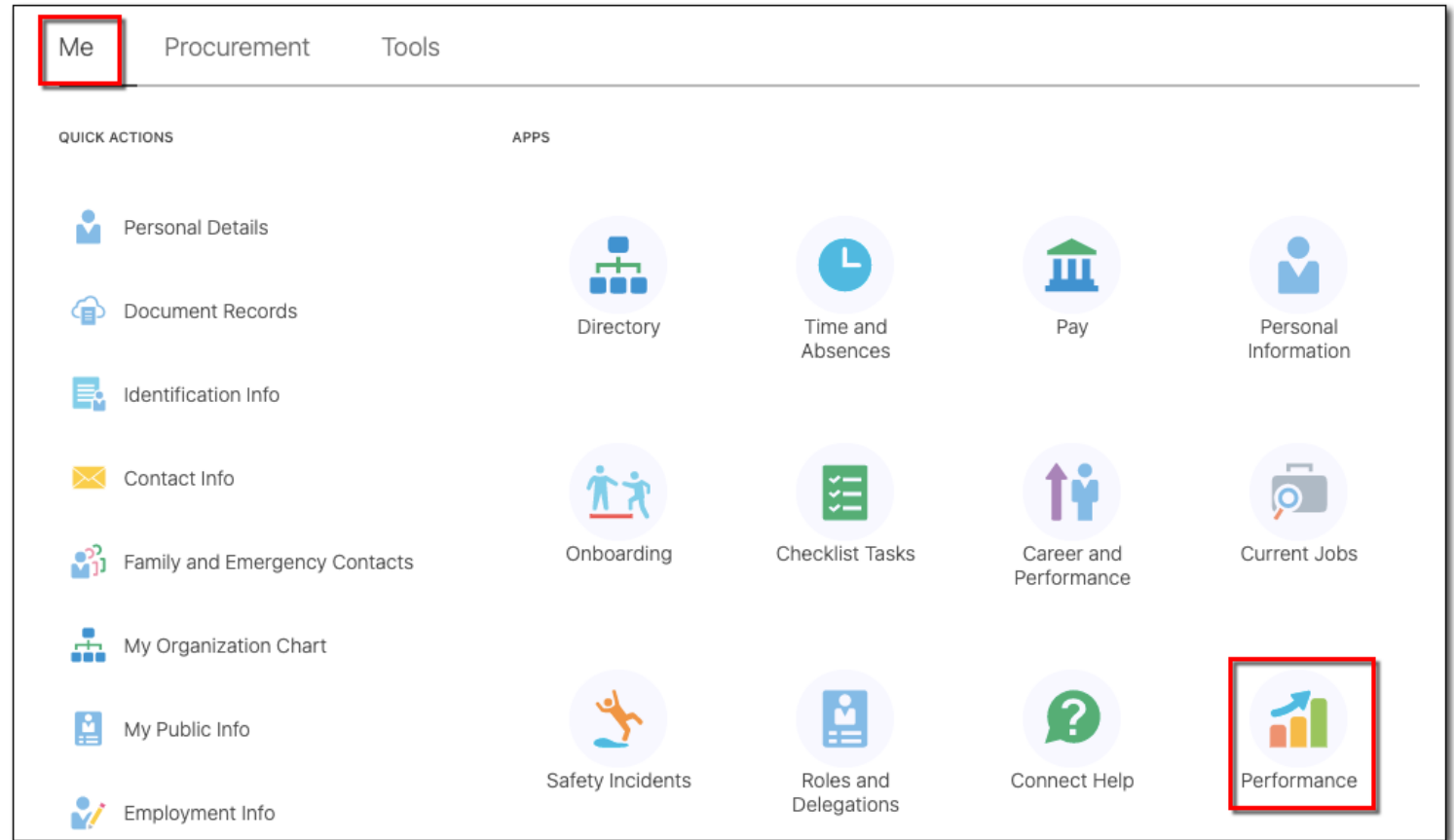
I have reviewed and acknowledge receipt of my annual performance evaluation.

Note: After the employee acknowledges receipt of the evaluation with manager ratings and comments, the employee and manager will meet to discuss the evaluation in more depth. After this has occurred, the employee can add their final comments to the evaluation.

4. Employee adds final comments to evaluation after meeting with manager

4. Employee Enters Evaluation Comments

1. Select **Me** to display your employee functions.
2. Click the **Performance** icon.



Note: Connect displays the current task to be completed and where you are in the overall evaluation process.

3. Click **Probationary/Trial Evaluation**.

Review Period
2021 Probationary/Trial Review Period

Performance Documents

All

Probationary/Trial Evaluation
★★★★★ |

Current Task
Staff Share input

Task Completion

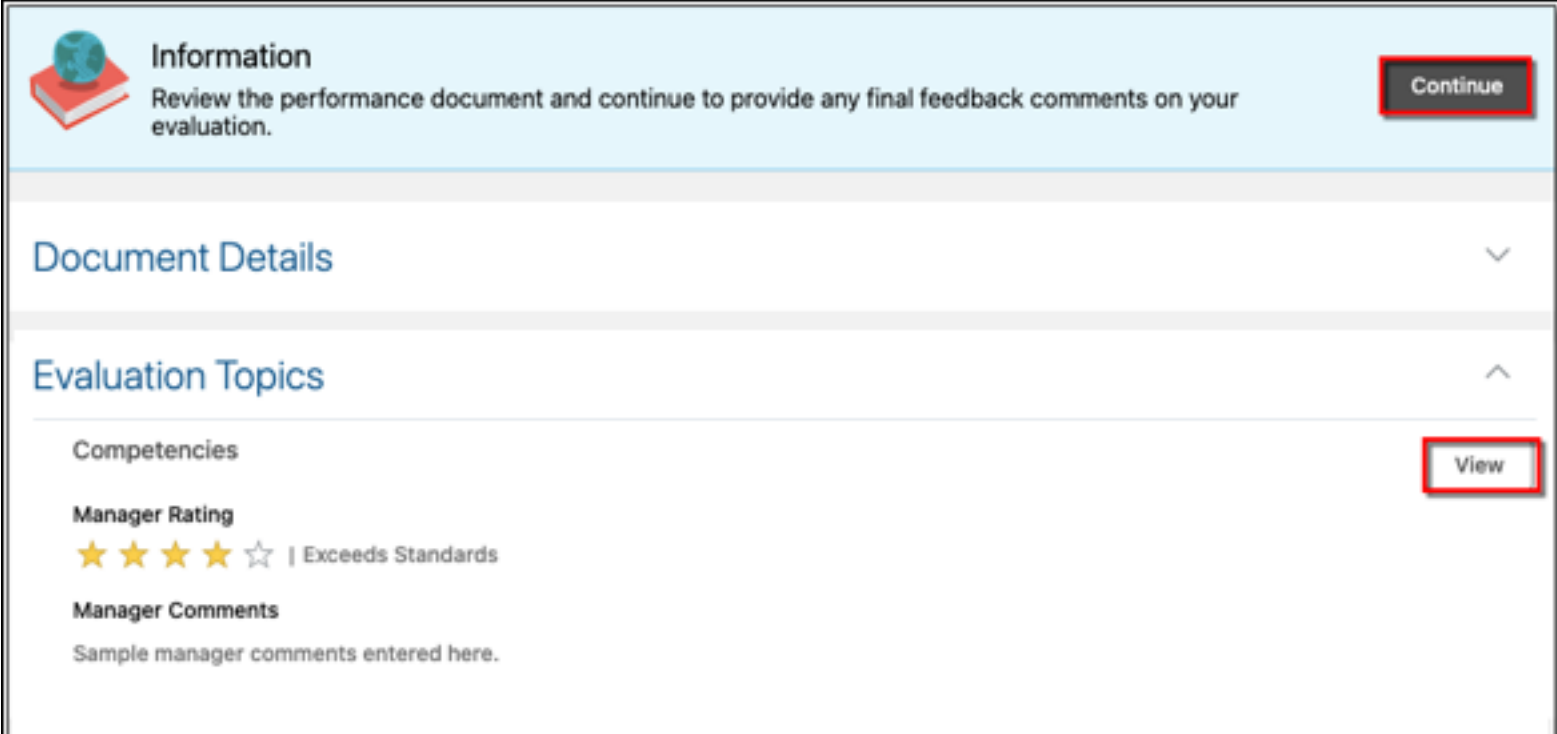
3 / 5

All Tasks

- ✓ Manager Evaluation of Workers
- ✓ Manager Shares Performance Document
- ✓ Staff Reviews and Acknowledges Evaluation
- ➔ Staff Share input
- Manager Provides Final Feedback

4. Employee Enters Evaluation Comments

4. If applicable, click the **View** button to review manager ratings and comments for **Competencies**.
5. When finished, click the **Continue** button.

A screenshot of a web application interface for an evaluation process. The interface has a light blue header bar. On the left of the header is a globe icon on a red book. To its right is the title 'Information' and a paragraph: 'Review the performance document and continue to provide any final feedback comments on your evaluation.' On the far right of the header is a red 'Continue' button. Below the header is a section titled 'Document Details' with a downward arrow. Below that is a section titled 'Evaluation Topics' with an upward arrow. Under 'Evaluation Topics' is a sub-section 'Competencies'. Below 'Competencies' is 'Manager Rating' which shows four yellow stars and one grey star, followed by the text '| Exceeds Standards'. Below that is 'Manager Comments' with the text 'Sample manager comments entered here.' On the right side of the 'Competencies' section is a grey 'View' button. The 'Continue' button in the header and the 'View' button are both highlighted with red rectangles.

4. Employee Enters Evaluation Comments

6. Enter your final **Comments** for the evaluation.
7. Click the **checkbox** to verify you are the employee being evaluated.

Note: The **Submit** button will not become active until the checkbox is selected.

8. Click the **Submit** button.

Staff Share input

Save and Close

Submit

Cancel

Comments

Employee Comments

Font

2

B

I

U

I agree with my evaluation and have no additional comments.

Paragraphs: 1, Words: 10, Characters (with HTML): 59

☒
By clicking on this box, I verify that I am

Note: When finished, Connect will display the **Current Task**, number of **Tasks Completed**, and where you are in the overall process.

Note: This is the last step in the evaluation process for the employee. Updates to the evaluation can no longer be made by the employee.

Performance Documents

All

Probationary/Trial Evaluation

★★★★★ | By [Redacted]

Current Task

Task Completion

Manager Provides Final Feedback

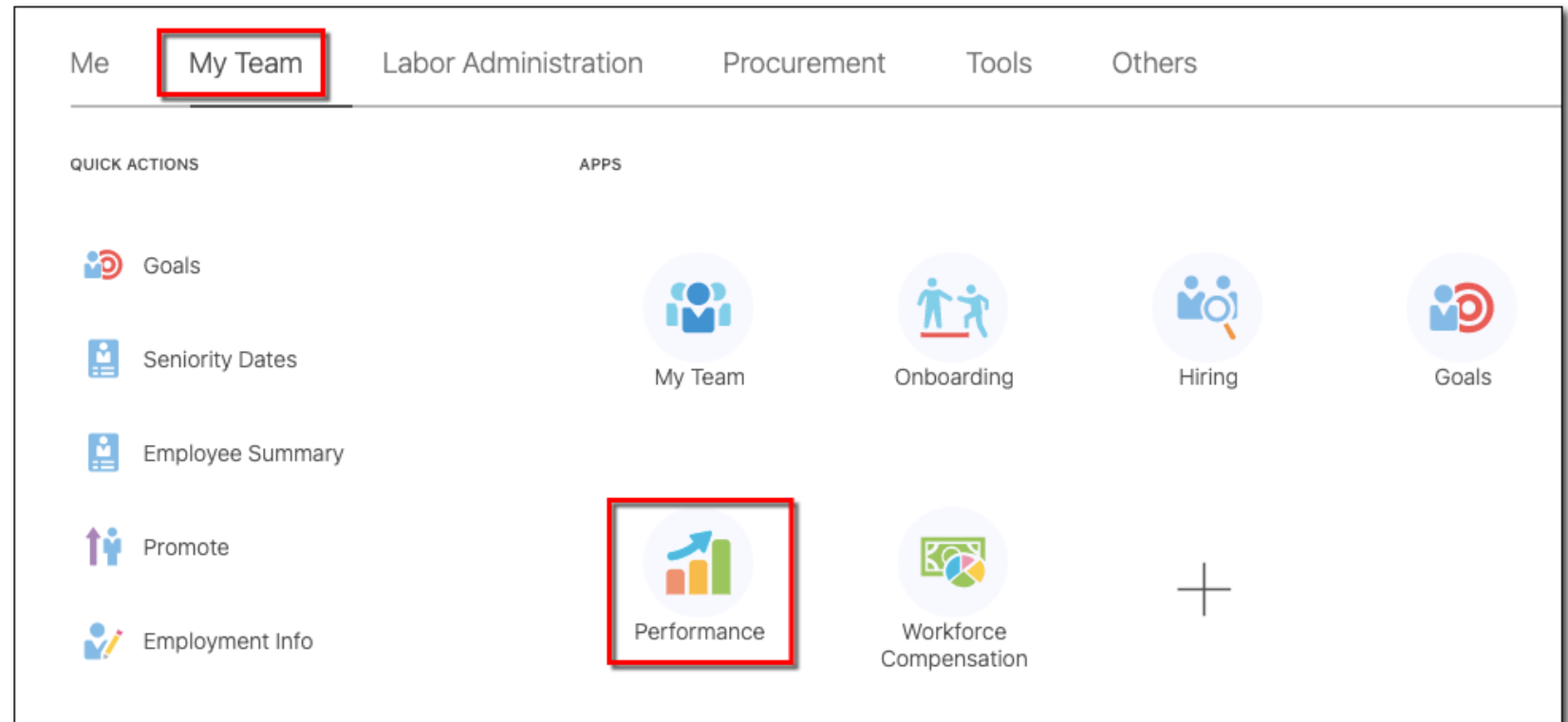
 4 / 5

All Tasks

- ✓ Manager Evaluation of Workers
- ✓ Manager Shares Performance Document
- ✓ Staff Reviews and Acknowledges Evaluation
- ✓ Staff Share input
- ➔ Manager Provides Final Feedback

**5. Manager provides final comments
after employee provides their final
comments**

1. Click **My Team** to display your manager functions.
2. Click the **Performance** icon.



3. Click **Probationary/Trial Evaluation** for the employee who is being evaluated.



Probationary/Trial Evaluation

Client Services Specialist-
Youth Engagement Specialist

Current Task	Task Completion
Manager Provides Final Feedback	4 / 5

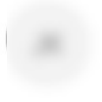
Manager Rating

★★★★★

All Tasks

Manager Rating

- ✓ Manager Evaluation of Workers
- ✓ Manager Shares Performance Document
- ✓ Staff Reviews and Acknowledges Evaluation
- ✓ Staff Share input
- ➔ Manager Provides Final Feedback



Probationary/Trial Evaluation

Client Service Specialist-
Youth Engagement Specialist

Current Task	Task Completion
Manager Evaluation of Workers	0 / 5

4. If applicable, click the **View** button to review the Competencies.



5. Manager Provides Final Comments

5. Scroll to the bottom of the page to review the employee's **final comments**.

Final Feedback

Manager Comments

Employee Comments
I agree with my evaluation and have no additional comments.
✓ By clicking on this box, I verify that I am [Signed In](#)

6. Scroll to the top of the page and click the **Continue** button.



Information
Review the performance document and continue to provide any final feedback comments on the employee's evaluation.
Continue

Document Details

Evaluation Topics

Competencies
8 of 8 rated | 8 of 8 commented
Manager Rating
★★★★☆ | Exceeds Standards
Manager Comments
Sample manager comments entered here.
View

7. Enter the final **Comments** for the employee's annual evaluation.

8. Click the **Submit** button.

Note: This is the last step for the manager in the annual evaluation process.

Manager Provide Final Feedback

Save and Close

Submit

Cancel

Comments

Manager Comments

Tahoma 2 B I U

Employee and manager have completed the annual evaluation.

Paragraphs: 1, Words: 8, Characters (with HTML): 58

Employee Comments

I agree with my evaluation and have no additional comments.

☒ By clicking on this box, I verify that I am

5. Manager Provides Final Comments

Note: By default, the manager's **Evaluate Performance** page displays open, in-progress evaluations.

To view the employee's completed evaluation, click the **Completed** link at the bottom of the page.

^ Employees Clear

All Evaluatees

Directs Only

^ Document Type Clear

☒ Standard

☐ Anytime

^ Tasks

☐ Assigned to me

^ Assignment Type Clear

☐ Nonprimary

☒ Primary

^ Assignment Status Clear

☒ Active

☐ Inactive

☐ Suspended

^ Document Status Clear

In progress

Completed

Canceled

All Tasks

☒ Set Goals
 ☐ Staff Self-Evaluation
 ☐ Manager Evaluation of Workers
 ☐ Manager Share Performance Document
 ☐ Staff Reviews and Acknowledges Performance Document
 ☐ Staff Share input
 ☐ Manager Provide Final Feedback



Annual Performance Review

Chris Patton

RESIDENT TECHNICIAN

Current Task

Set Goals

Task Completion

0 / 7



Annual Performance Review

Roberta Williams

RESIDENT TECHNICIAN

Current Task

Set Goals

Task Completion

0 / 7

9. Click **Probationary/Trial Evaluation** for the employee's completed evaluation.

Note: The employee's completed evaluation can be viewed or printed any time but not updated.

End of Procedure.



Probationary/Trial Evaluation

Client Services Specialist-
Youth Engagement Specialist

Manager Rating
★★★★★

Overall Summary

Manager Rating
★★★★★ | Outstanding
Manager Comments
Show Additional Info

Evaluation Topics

Competencies
0 of 8 rated | 0 of 8 commented
Manager Rating
★★★★★ | Outstanding
Manager Comments

View