

Employee Performance Appraisal Process

In compliance with the applicable bargaining agreement and Title 5, each year all regular and long term temporary employees should be provided with an official performance appraisal:

Management Personnel Plan Employees

For employees who are part of the Management Personnel Plan (MPP), the evaluation is completed each year for the period of July 1, through June 30. Evaluations are due to the office of the Director of Human Resources by July 15 of each year. Individual who have been employed as an MPP for 6 months of more as of June 30 should be evaluated.

The performance appraisal form must be completed by the employee's MPP. Once completed, the appraisal should be reviewed with the employee. Once the appraisal is finalized, it should be signed by both the MPP and the employee and then forwarded to either the Provost or appropriate VP, or directly to the Office of the Director of Human Resources; depending on the departments normal processing procedures.

For the form that should be used to document the performance of the MPP can be found at:

<http://www.csufresno.edu/humres/Forms/MPP.Appraisal.Form.072904.2.doc> This is a word document that can be completed on-line then printed.

Staff Employees, Units 2, 5, 6, 7, 8 and 9

All regular employees and long term¹ temporary employees in all bargaining units, except Unit 4, are to be provide with an official performance evaluation for the year period of October 1 through September 30. Evaluations are due to the Office of Employment Services by October 31 of each year.

The performance appraisal form must be completed by the employee's MPP. The MPP can obtain information for the evaluation the employee's working supervisor or lead person. Once the appraisal is completed in draft form, it should be discussed with the employees. Employees in CSEA (Units 2, 5, 7, and 9) must be given 5 days from the time the draft appraisal is presented to them, until the time the appraisal is finalized. If during this review time, the employee provides the MPP with additional information that is directly related to the employee's performance, the MPP should take this information into consideration before finalizing the appraisal form. Once the appraisal is finalized, it should be signed by both the MPP and the employee. The form should then be forwarded to the Department Director, the Provost, or VP; depending on the departments normal processing procedures.

The form that should be used to document performance for all staff employees except, Unit 3 and 4, can be found in **Informed Filler**. The name of the form is "Performance Appraisal". There are directions below to access **Informed Filler** documents.

Staff Employees, Unit 4

All regular employees and long term¹ temporary employees in bargaining Unit 4 are to be provided with an official performance evaluation for the year period of October 1 through September 30. Evaluations are due to the Office of Employment Services by October 31 of each year.

The performance appraisal form must be completed by the employee's MPP. The MPP can obtain information for the evaluation the employee's working supervisor or lead person. Once the appraisal is completed in draft form, it should be discussed with the employees. Employees in Unit 4 must be given 14 calendar days from the time the draft appraisal is presented to them, until the time the appraisal is finalized. If during this review time, the employee provides the MPP with additional information that is directly related to the employee's performance, the MPP should take this information into consideration before finalizing the appraisal form. Once the appraisal is finalized, it should be signed by both the MPP and the employee. The form should then be forwarded to the Department Director, the Provost, or VP; depending on the departments normal processing procedures.

The form that should be used to document performance for all Unit 4 employees can be found in **Informed Filler**. The name of the form is "Performance Appraisal Unit 4!". There are directions below to access **Informed Filler** documents.

Other forms for Unit 4 employees that are available to be used with the performance appraisal, or at other times of the year are:

Key Incidents Form – In accordance with Article 18.1A3 of the Unit 4 collective bargaining agreement, performance evaluations shall refer to key incidents documented in the personnel file. The purpose of this form is to document key incidents that may affect a specific evaluation rating, positively or negatively.

Skill Enhancement Form – This form is provided to document a specific skill enhancement plan. This is typically completed after the performance evaluation is finalized.

Position Description Form – This form is required for all positions and must be updated annually. This form must be completed by the appropriate administrator and documents the expectations of the position. It may be updated at any time and should be reviewed at the time the performance evaluation is completed.

Informed Filler Instructions

Below are the instructions to load these new forms into **Informed Filler**. If you have any problems loading the forms or need to have the program added to your computer, please contact the ITS help desk at campus extension 8-5000.

1. Start the **Informed Filler** application and select New Document from the File menu. NOTE: You must be in the Filler application menu. If you DO NOT have New Document as a choice under the File menu, try opening any existing form first then selecting New Document from the File menu.
2. From the pull-down menu (default is set to Local Templates), choose Services. After selecting Services you should see "FTP Server A" and/or "FTP Server Z" in the left side box.
3. Select FTP Server A and click open. Please be patient, it may take a few moments to make the connection.
4. Scroll down the list in the left side box and select the form(s) you wish to download. Use to file names listed below to select the document and click the button labeled New.

PERFAPPR.ITP . . .	Performance Appraisal (For all Units Except Unit 4)
PERFAPP4.ITP . . .	Performance Appraisal Unit 4
UNIT4KEY.ITP	Unit 4 Key Incidents
UNIT4SKILL.ITP . . .	Unit 4 Skill Enhancement Plan
POSNDESC.ITP . . .	Position Description