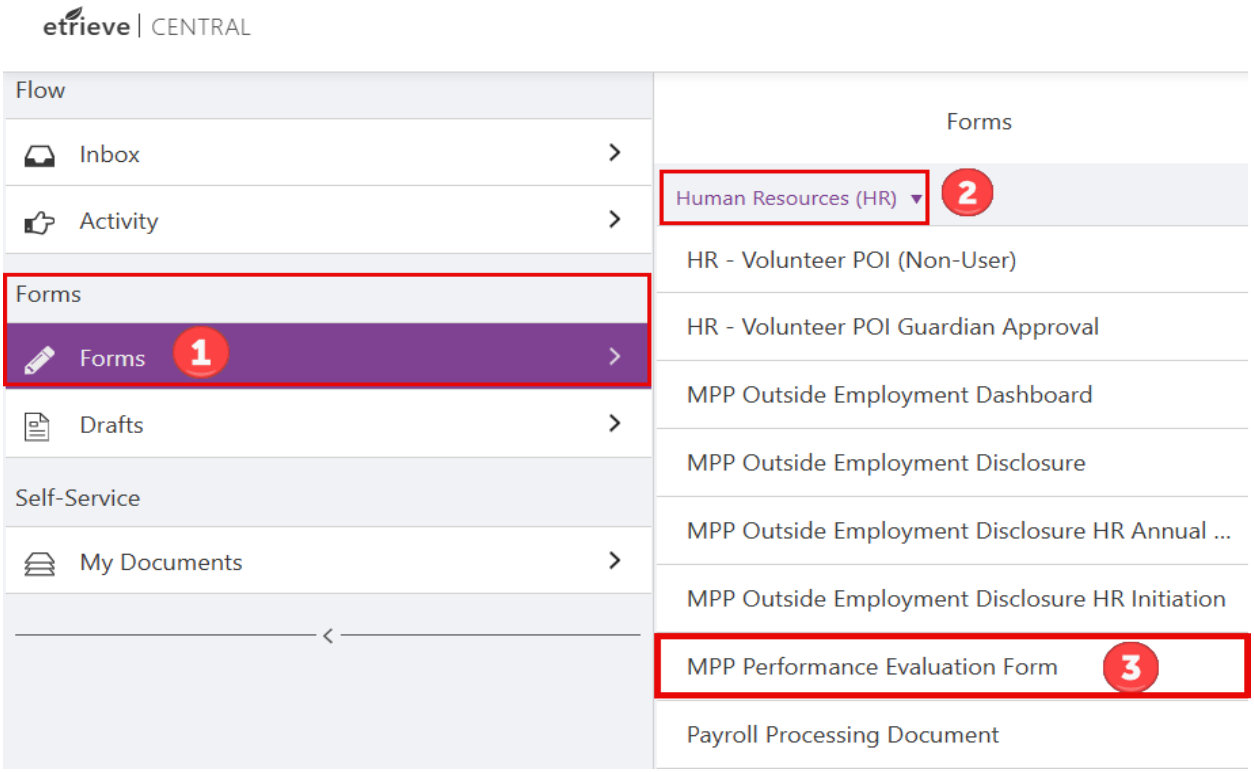
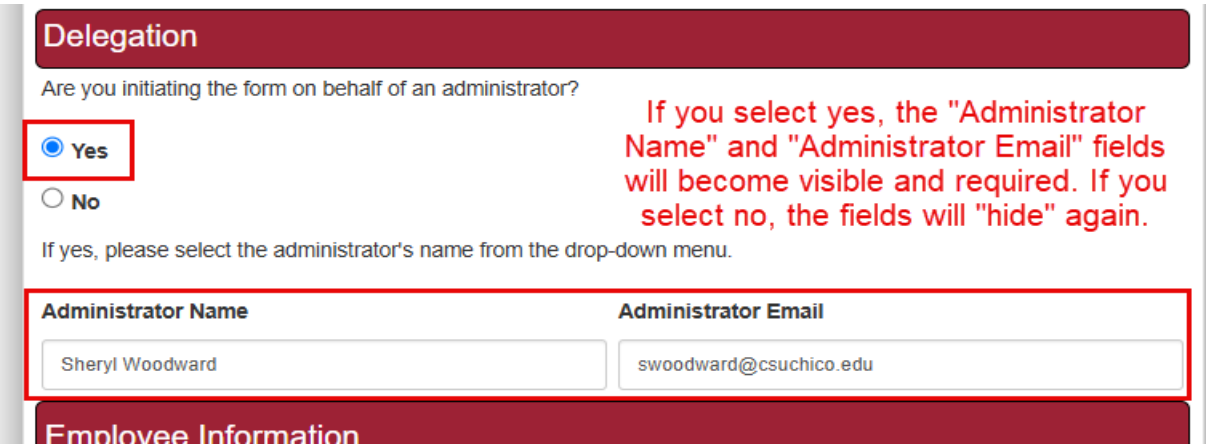
MPP Performance Evaluation Instructions – Administrator

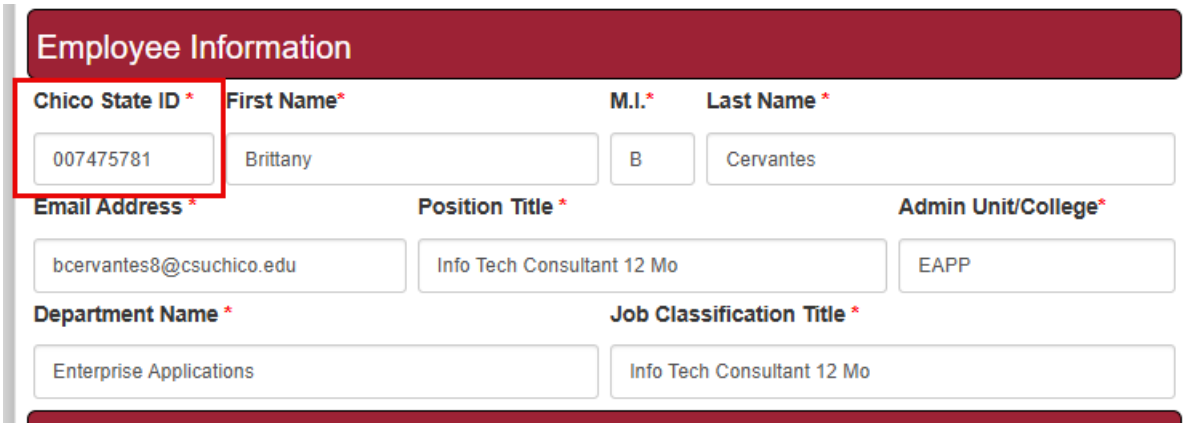
1. Log in to Softdocs. You will use your Chico State credentials and authenticate with DUO.
2. Once you are logged in and viewing the homepage, follow these steps to locate the form:
    1. Click the “Forms” tab on the left side of the screen.
    2. Scroll down to the “Human Resources” section.
    3. Select the “MPP Performance Evaluation Form.”



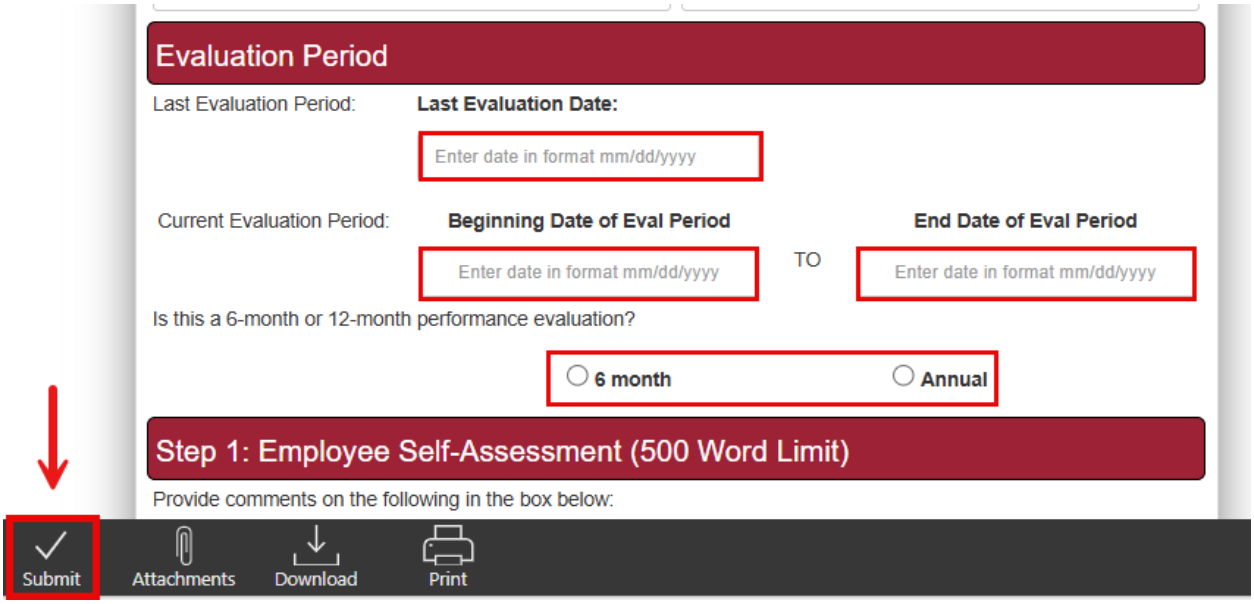
2. The MPP Performance Evaluation Form will populate on the right side of the page. Next, you will select “Yes” or “No” in the “Delegation” section. If you select “Yes”, please select the Administrator from the “Administrator Name” field. The form will populate the email on the right side of the screen.



3. Next, you will need to enter the employee’s 9-digit Chico State ID. **This is not their CHRS ID.** Softdocs will populate the remaining information fields.
    1. The Chico State ID field must contain exactly nine digits. If the ID number is automatically cleared when you attempt to proceed, it is likely because the entry does not meet the required nine-digit format. Without a valid nine-digit ID, Softdocs will be unable to populate name and job information.
    2. If you enter all 9-digits and Softdocs not populating the remaining fields, please double check the ID number is correct.



4. Complete the Evaluation Period section and fields. Once this is complete, select "Submit" from the menu bar at the bottom of the window.



5. The form is now routed to the employee's inbox. They will complete the Self-Assessment section and enter at least one SMART goal in section 5.
6. Once the employee has completed their self-assessment and entered a SMART goal, the form is routed back to your inbox. You will receive an email notifying you it is time to complete the next sections of the form.
    1. The sender on all Softdocs-related emails is **ChicoState-Softdocs-no-reply.**

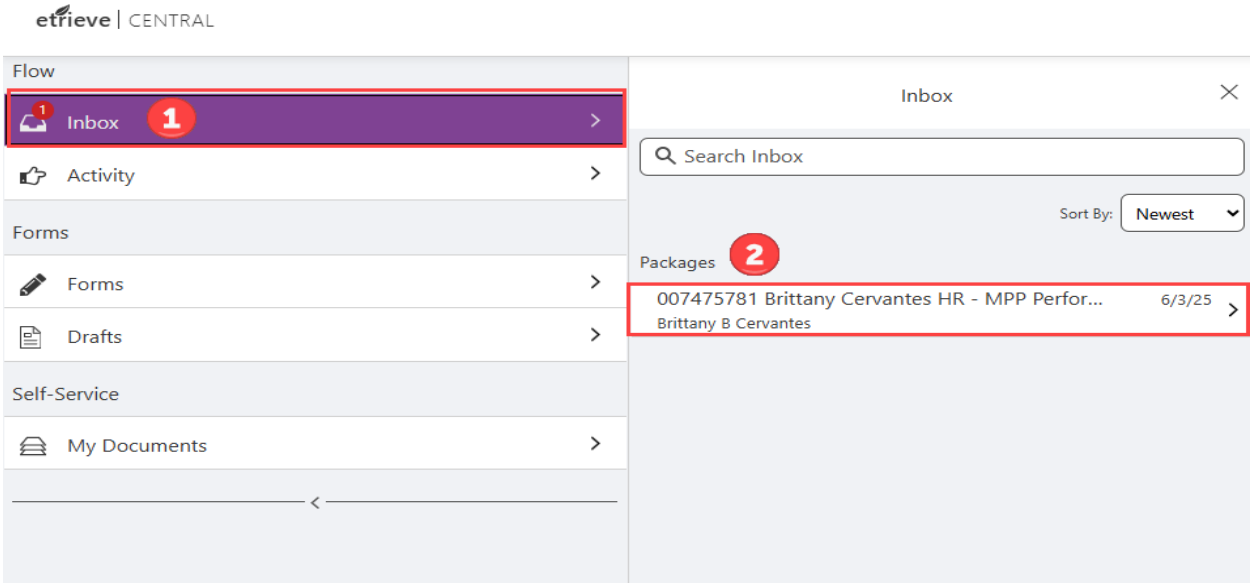
Subject: Brittany Has Completed the MPP Performance Self Evaluation

California State University Chico

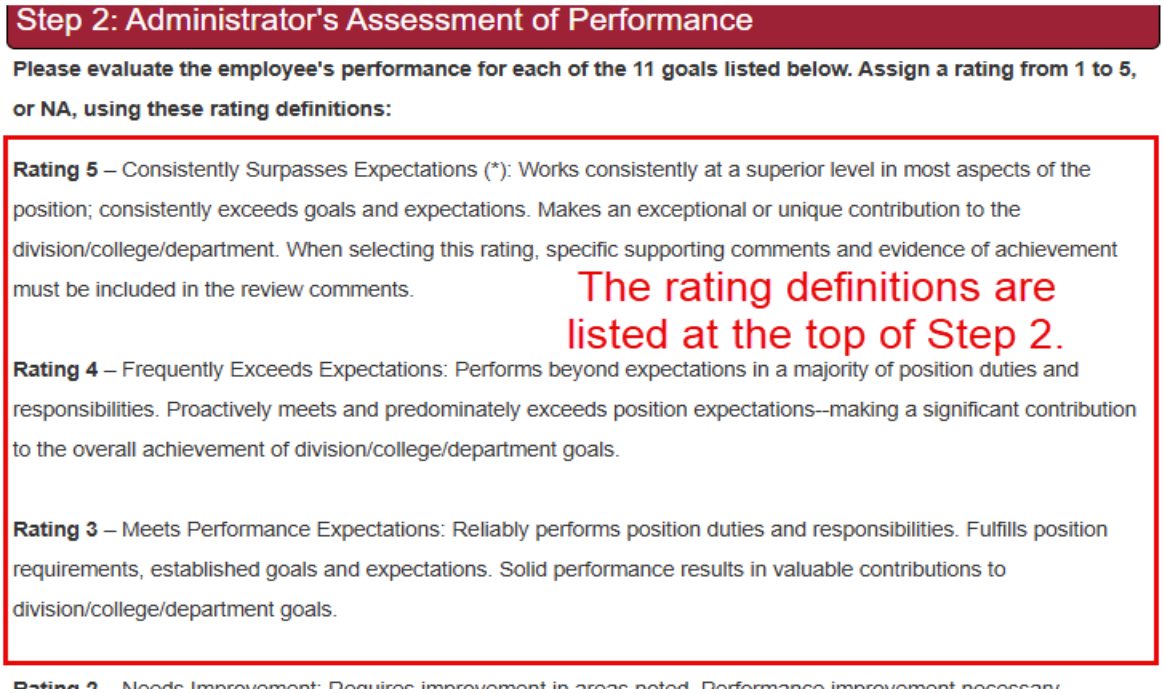
Dear Brittany B Cervantes,

Brittany has completed the Self-Assessment portion of their MPP Performance Evaluation. The form has been sent to your Softdocs inbox and is ready for further review. Please log into the Softdocs homepage to view your Softdocs inbox and complete the assessment sections. If you have any questions, please contact us.

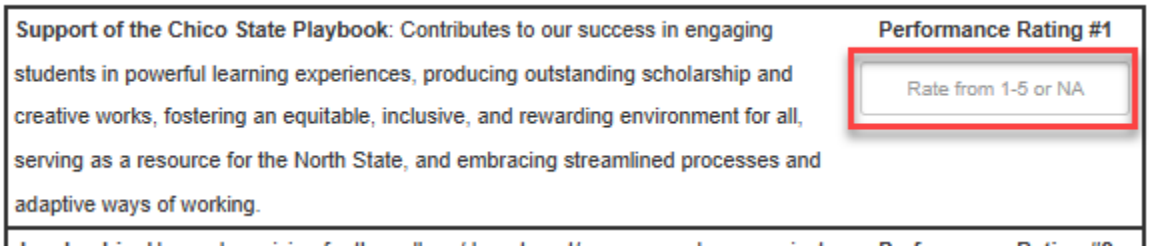
7. Log in to Softdocs and follow these steps to locate the item in your inbox:
    1. Click the “Inbox” tab on the left side of the screen.
    2. Select the performance evaluation form in the center tab. The performance evaluation packages in Softdocs follow this naming convention: Chico State ID #, First Name Last Name, MPP Performance Evaluation.



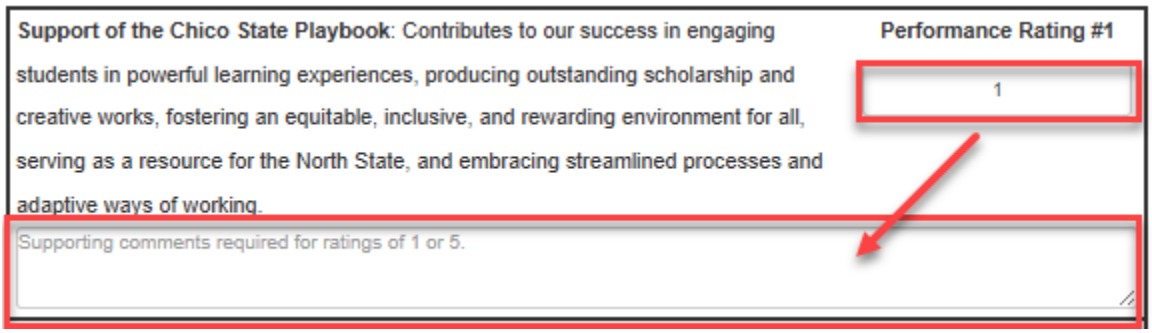
8. You will now complete **Step 2.** In this step, there are 11 performance goals that each need a rating. Use the rating definitions to rate each goal. You may rate the employee using numbers 1-5, **or** Not Applicable (NA). A rating of 1 or 5 requires supporting comments.



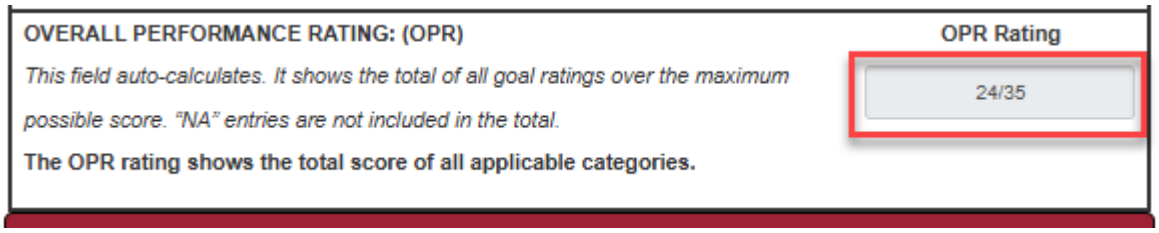
9. To enter a performance rating, click into the text field box. Enter a rating of 1-5, or NA.



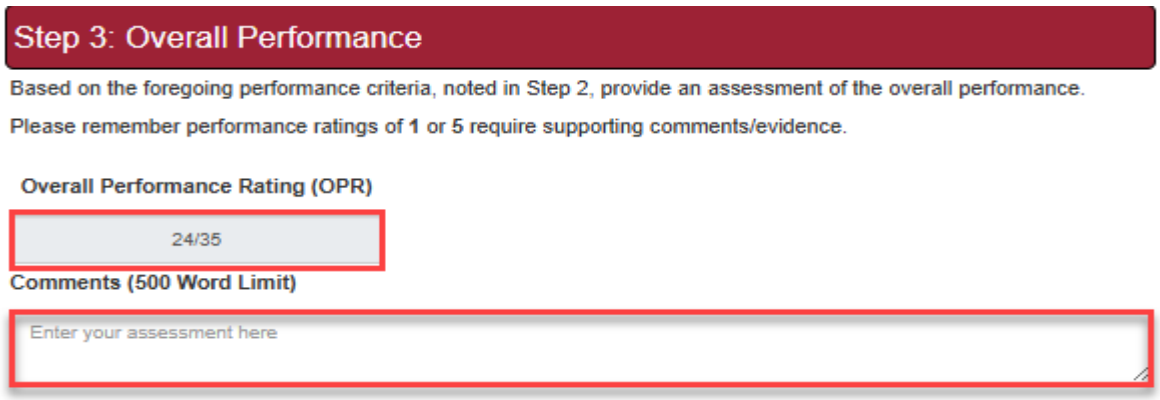
10. If you enter a rating of 1 or 5, an additional text box is displayed, and you are prompted to enter supporting comments.



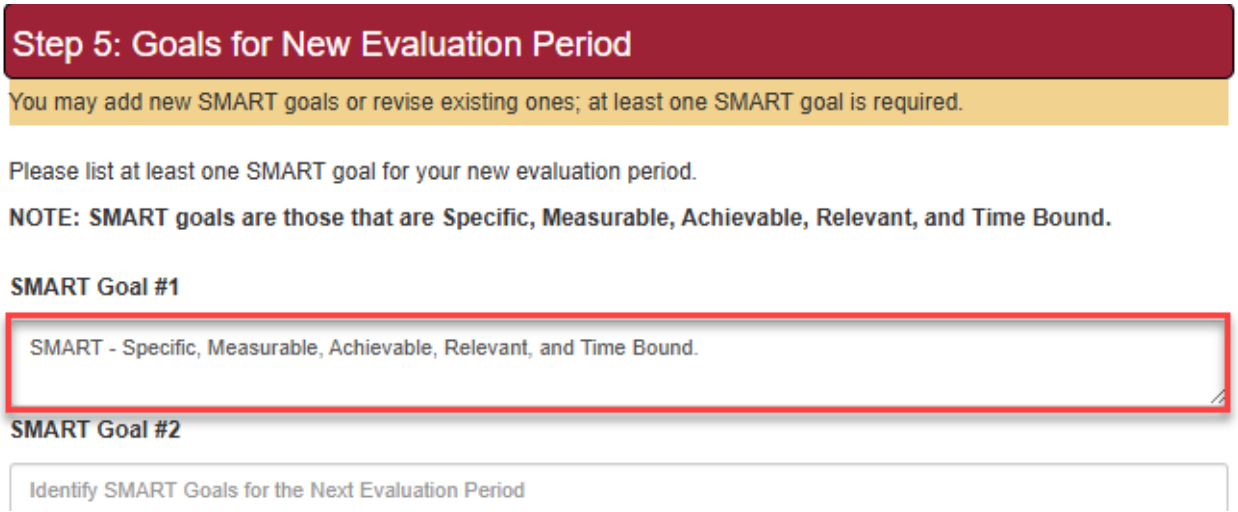
11. Enter a performance rating for all 11 goals. At the end of **Step 2**, Softdocs will calculate the Overall Performance Rating (OPR). This is a read-only field. It displays the total score of all *applicable* categories and does not include ratings of NA.



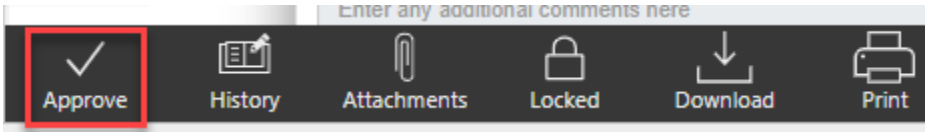
12. Next, you will complete **Step 3** in the performance evaluation. Softdocs will copy the OPR rating from Step 2; you do not need to calculate anything. Use the text box in this step to provide an assessment of the employee's overall performance.



13. Once you have completed **Step 3,** you have the option to enter SMART goals in **Step 5.** You may add additional SMART goals or revise the existing ones entered by the employee. To enter or edit a SMART goal, click into the textbox under SMART Goal #1, SMART Goal #2, etc.



14. Once you have completed Steps 2 and 3, and potentially entered any SMART goals, select "Approve" from the menu bar at the bottom of the window.



15. After clicking submit, the form is routed to the employee to review the performance evaluation.
16. You will receive the email below once the employee has completed their review and moved the performance evaluation forward. **When you receive this email, please set up a meeting with your employee to discuss the performance evaluation further.**

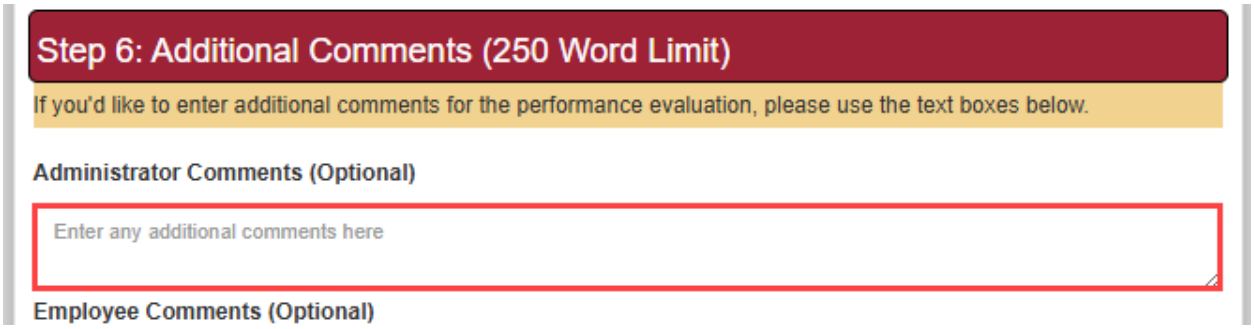
Subject: Performance Evaluation Ready for Manager Review and Signature

California State University Chico

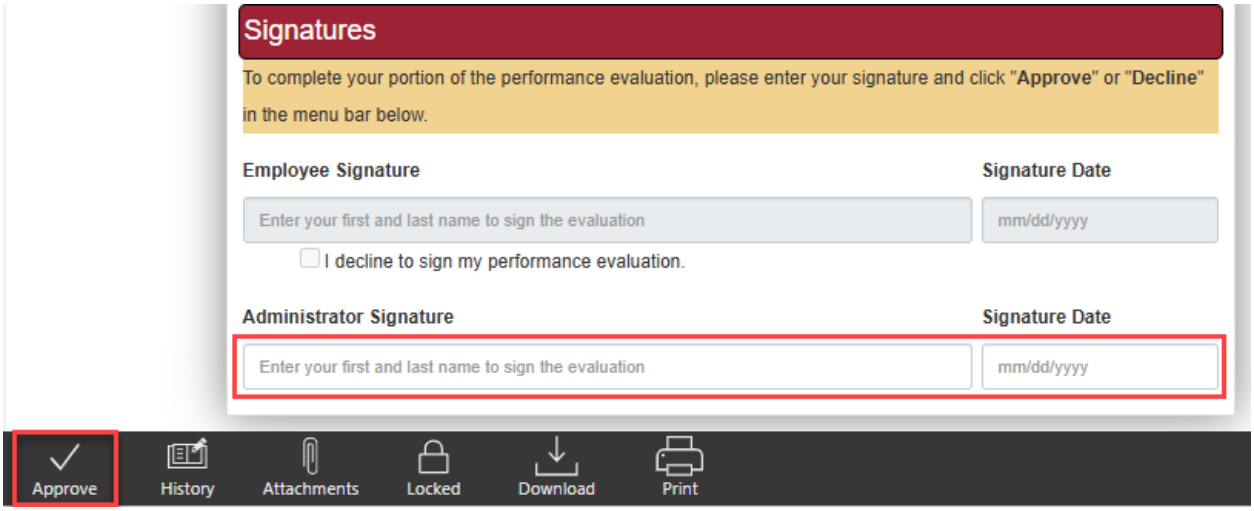
Dear Brittany B Cervantes,

Brittany has reviewed their performance ratings and overall comment. Please meet with your employee to review the evaluation together and make any necessary revisions. You will also have the opportunity to add comments and finalize SMART goals. Once this step is complete, please sign and date the performance evaluation. It will then be routed to the employee for final signature.

17. When you are ready to review the performance evaluation with the employee, you will find the form in your Softdocs inbox. In your meeting with the employee, you may update the ratings and comments in Steps 2 and 3. You may also add or edit the SMART goals in Step 5 and include any final comments in Step 6. The additional comments text box in Step 6 is *optional*.



18. Once you have finalized your review with the employee, enter your signature and date in the final section of the form. Click “Approve” to finalize your sections of the workflow.



19. After clicking “Approve”, the form is routed to the employee for additional comments and a signature. You will receive the email below once the employee has completed the signature portion. This evaluation will be placed in the employee's personnel file.