

2/20/2024

**INSTRUCTIONS FOR COMPLETING PERFORMANCE EVALUATIONS**

Annual Performance Evaluations are due for submission by **June 30, 2024** for classified and non-faculty contract employees. To streamline the process, we have developed a digital-friendly “EZ” form. This **form** can be found on the Employee and Labor Relations (E&LR) [web site](http://www.montana.edu/hr/EmployeeRelations.html).

**Steps:**

1. **Supervisors can download the form from the E&LR** [**web site**](http://www.montana.edu/hr/EmployeeRelations.html)**. Change file name to**

**“EMPLOYEE LAST NAME\_FIRST NAME\_EVAL.2024”**

1. **Supervisor e-mails blank evaluation template to employee to add employee comments.**
2. **Employee e-mails evaluation back to supervisor to add supervisor comments.**
3. **Supervisor sets up a meeting to discuss the evaluation.**
4. **Supervisor sends complete evaluation to employee prior to meeting.**
5. **Supervisor makes any changes/adds notes during the meeting.**
6. **Supervisor uploads document to DocuSign\* and routes for signatures (Employee “Needs to**

**Sign,” Supervisor “Needs to Sign,” courtesy copy to “performanceevaluations@montana.edu”**

*\*Assistance on how to use DocuSign is available* [*here*](http://www.montana.edu/uit/docusign/)

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