

Instructions for Completing the PES Planning Form for 2019-2020

Open last year's planning form from your network drive and change the Performance Year and Evaluation Period to 7/1/2019 - 6/30/2020. Skip to #4 below.

Below are detailed instructions for completing the 2019-2020 PES Planning form, if needed.

1. **Page 1:** [Click here](#) to open the form. Note the light grey shaded areas of the form. You will be able to enter information directly into these areas.
 - a. Employee Information: Enter your department, employee's W number, employee's name and title. The Performance Year and the Evaluation Period have already been entered.
 - b. Initial Planning Session: Skip this until you've completed page 3.
2. **Page 2:** Skip completely.
3. **Page 3:**
 - a. Enter the Employee's name and W number at the top of the page.
 - b. Agency Mission/Goals/Standards: Skip; Southeastern's mission has already been entered.
 - c. Department Mission/Goals: Enter your departmental mission/goals.
 - d. Work and Behavior Expectations:
 - i. You must list an expectation for the 8 required factors on the form: Compliance, Customer Service, Communication, Dependability, Initiative, Interpersonal, Professionalism, and Work Product.
 - ii. The expectations for Compliance and Customer Service have already been entered. These are University standards and must be used as shown, but you may add expectations to these two factors.
 - iii. For all other factors, you may create your own expectations or you may use those found by clicking on the Bank of Expectations link on the form.
 - iv. Work Product expectations should reflect the employee's duties and may refer to the position description.
 - v. You may add other factors and expectations, but there must be at least one expectation for the 8 required factors.
 - e. Documentation/Comments: Skip this section.
4. **Page 1:**
 - a. Initial Planning Session:
 - i. ALL dates in the Initial Planning Session must be on or before September 16, 2019. The Planning Session should be conducted on or before September 16, 2019.
 - ii. Step #1: Sign, enter your W number as the Personnel #, and list the date you give or send the form to the Second Level Evaluator.
 - iii. Step #2: The Second Level Evaluator signs, dates, and enters his/her W number as the Personnel #.
 - iv. Step # 3: Meet with the employee to review the expectations beginning on page 3. After reviewing the expectations with the employee, the employee signs and dates the form.
5. Make two copies of the entire signed document. Give one copy to the employee and send the other copy to your HR Partner by Monday, September 16, 2019. The original should be kept in your supervisory file or other secure location until the evaluation period ends on June 30, 2020.