On-line Academic Performance Evaluation System

User Manual for Evaluators and Administrators

Academic Affairs Office
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>LOGGING IN</td>
</tr>
<tr>
<td>4</td>
<td>HOME PAGE</td>
</tr>
<tr>
<td>5</td>
<td>TENURE-STREAM</td>
</tr>
<tr>
<td>5.1</td>
<td>Creating an Evaluation</td>
</tr>
<tr>
<td>5.2</td>
<td>Filling in the form</td>
</tr>
<tr>
<td>5.3</td>
<td>Submitting the form</td>
</tr>
<tr>
<td>5.4</td>
<td>Editing a form</td>
</tr>
<tr>
<td>5.5</td>
<td>Deleting a form</td>
</tr>
<tr>
<td>6</td>
<td>CONTRACT ACADEMIC STAFF – RESEARCH/PROFESSIONAL/TEACHING</td>
</tr>
<tr>
<td>6.1</td>
<td>Creating an Evaluation</td>
</tr>
<tr>
<td>6.2</td>
<td>Filling in the form</td>
</tr>
<tr>
<td>6.3</td>
<td>Submitting the form</td>
</tr>
<tr>
<td>6.4</td>
<td>Editing a form</td>
</tr>
<tr>
<td>6.5</td>
<td>Deleting a form</td>
</tr>
<tr>
<td>7</td>
<td>CAS FULL-TIME CLINICAL EVALUATIONS</td>
</tr>
<tr>
<td>7.1</td>
<td>Creating an Evaluation</td>
</tr>
<tr>
<td>7.2</td>
<td>Filling in the form</td>
</tr>
<tr>
<td>7.3</td>
<td>Submitting the form</td>
</tr>
<tr>
<td>7.4</td>
<td>Editing a form</td>
</tr>
<tr>
<td>7.5</td>
<td>Deleting a form</td>
</tr>
<tr>
<td>8</td>
<td>ACADEMIC ASSOCIATES UNRANKED CAS</td>
</tr>
<tr>
<td>8.1</td>
<td>Creating an Evaluation</td>
</tr>
<tr>
<td>8.2</td>
<td>Filling in the form</td>
</tr>
<tr>
<td>8.3</td>
<td>Submitting the form</td>
</tr>
<tr>
<td>8.4</td>
<td>Editing a form</td>
</tr>
<tr>
<td>8.5</td>
<td>Deleting a form</td>
</tr>
<tr>
<td>9</td>
<td>ACKNOWLEDGING AN EVALUATION</td>
</tr>
</tbody>
</table>
3 LOGGING IN

The web link to the on-line evaluation system can be found on the Faculty of Medicine website under Performance Evaluation.

http://www.mcgill.ca/medicine-academic/performance

Click on the “LOGIN” button – for Departmental Chairs/Directors to create an evaluation

Your McGill credentials are required for login to the system.

Username:  firstname.lastname@mcgill.ca
Password:  email password

If you need assistance activating or accessing your McGill e-mail address, please visit the following site for instructions:
http://kb.mcgill.ca/kb/article?ArticleId=1016&source=Article&c=12&cid=2
or contact the McGill ICS Service Desk at 514-398-3398. You will need your McGill Staff I.D. number when you call.
4 HOME PAGE

Once logged in, the Evaluator will be able to see on the HOME page all 5 types of evaluations. The numbers in the columns next to the evaluation type will indicate if there are evaluations waiting to be done in that type. An evaluation is required for all of the following academic types.

**Faculty of Medicine - Academic Performance Evaluation**

![Evaluation Table]

There are 5 types of evaluation forms depending on the academic appointment.

1. **Chairs and Directors**: this evaluation type is reserved for the Dean and is used to evaluate the academic leaders

2. **Tenure-stream**: used for tenure-track and tenured faculty
   - All tenure-stream staff including GFT-U and those on the Clinician-Scientist program
     - all eligible for salary policy

3. **Full-time CAS clinical**: all full-time clinical staff members – this category is not eligible for salary policy

4. **Academic Associates Unranked CAS**: all including part-time are eligible for salary policy even if paid on a restricted fund

5. **Contract Academic Staff – Research/Professional/Teaching**:
   - All full-time CAS (Research or Professional) staff regardless of salary and part-time if paid by McGill
     - only eligible for salary policy if they have a salary paid from McGill
There are 3 columns that provide a quick glimpse as to the status for each evaluation type:

1. **# of completed evaluations by Chair:** indicates how many evaluations have already been submitted by the Chair
2. **Total # of evaluations:** indicates how many evaluations are required in this type
3. **% evaluations completed:** indicates the percentage of evaluations completed by the Chair

**5  TENURE-STREAM**

5.1  Creating an Evaluation

Click on the Icon of the type to access the list of names of academic staff member

**Faculty of Medicine - Academic Performance Evaluation**

- Select a name from the list.

**Faculty of Medicine - Academic Performance Evaluation**

- Report-Elgible Academics
  - Karkatsoulis/Angelo No 99999 X 20 JAN-2016
  - Oracle/Medicine No 99999 X
Press on the EDIT/VIEW button to the left of the name to open the performance evaluation form for the individual.

- Complete the form as per instruction in next section: “Filling in the form”
- If the name of the academic staff member for whom you wish to create an evaluation does not appear in the list, contact the Academic Affairs Office for assistance.
- At any time, if you would like to go back to the HOME Page, Click on the FACULTY OF MEDICINE title.

5.2 Filling in the form

The form is automatically populated with the evaluation period dates, name, and department. The previous 3 years evaluations, if applicable, are also available directly on the form for reference.

To fill out the performance evaluation, the following rules apply:

- All fields are mandatory EXCEPT the Clinical Contribution section. This section is used only for GFT-U/Clinican-Scientist staff and does not factor in the merit calculation.
The evaluation is done using a scale of 1 to 6, where 1 is the “lowest” and 6 is the “highest”.

For the weight:
1. You can select “0” only once per evaluation. Please note a “0” weight should never be applied to “Professionalism & Collegiality”.
2. You can select “2” (“double up”) only once per evaluation.
3. The total of the weight must add up to 9.

To enter the scores, click on the radio button next to the corresponding “Score” in each of the six sub-categories.

Select the “Weight” for each of the six sub-categories. 1 is set as the default. To change the weight, choose a value of 0, 1 or 2 from the pick list. A weight of 2 and 0 may be used each only once per evaluation when opting to “double up”. See the explanation below for “doubling-up”.

Enter any “Comments/Major Achievements” as well as “Goals and Objectives for the coming year”, as required.

Click on “Cancel” to erase the form if you want to start over. The academic’s name will still appear in the drop-down list on the Introduction page.

**DO NOT USE the “BACK” button.** To return to the home page, click on the Faculty of Medicine title.

**When to use “2” and “0” weighting**

When warranted by unusual circumstances, the evaluator can opt to give double weighting on only ONE sub-category.

“2″ and “0″ weighting must be used together and only once per evaluation. This weighting is used for academic staff members who may not perform one of the three categories of: Teaching, Research or Administrative Contributions & Clinical Administration to the same extent or not at all, as compared to the other two categories. In this case, one sub-category where activity is greater may be double weighted but another sub-category where activity is lower must be “zeroed out”. This allows for more emphasis where the academic staff member contributes most and is an attempt to ensure a “balanced” evaluation. A “0″ weight should never be applied to “Professionalism & Collegiality”.
Sample evaluation form:

```
Faculty of Medicine - Academic Performance Evaluation

ACADEMIC PERFORMANCE EVALUATION
EVALUATION PERIOD: 01-JAN-2010 TO 31-DEC-2010

Academic:  Ezen/Helene/OI
Org:  Faculty

Previous years evaluations

<table>
<thead>
<tr>
<th>Evaluation Year</th>
<th>Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Evaluation 2014</td>
<td></td>
</tr>
<tr>
<td>Performance Evaluation 2013</td>
<td></td>
</tr>
</tbody>
</table>

Notes
* When warranted by unusual circumstances, the evaluator can opt to give double weighting on only ONE sub-category, if a double weighting of 2 is used, another sub-category must be marked as 0. Thus, all sub-categories must be rated for a weight of 2. ** The Clinical Contribution section applies to clinical faculty only and does not factor in merit calculation.

Please answer the questions below, using a scale of 1 to 6, where 1 is "Lowest" and 6 is "Highest":

<table>
<thead>
<tr>
<th>TEACHING</th>
<th>SCORE</th>
<th>WEIGHT*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of Teaching</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantity of Teaching</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESEARCH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality and Quantity of Publications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants &amp; Awards Received</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scientific &amp; Scholarly Activities</td>
<td>(eg: CIHR, journal reviews, journal editor, etc.)</td>
<td></td>
</tr>
<tr>
<td>ADMINISTRATIVE CONTRIBUTIONS &amp; CLINICAL ADMINISTRATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department Administration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty, Clinical Service and University</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outside Organizations (eg: Conference planning, executive of professional bodies, advice to governments, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROFESSIONALISM &amp; COLLEGIETY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionalism &amp; Collegiarity</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Updated: January 2020 FV
5.3 Submitting the form

- Click on “Apply Changes” at the bottom to save the form and submit it to the academic staff member.

- The academic staff member will automatically receive an email informing them that the evaluation has been submitted and instructing them to login to the ACADEMIC STAFF PORTAL to view and acknowledge their evaluation.

- The evaluation will remain available in the Chair’s list however an “X” will now appear in the “Eval Exists” column.

5.4 Editing a form

- The evaluation can be edited by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.
- Modify the evaluation form and click on “Apply Changes” at the bottom of the form. You can only modify the evaluation if an academic did not acknowledge it yet. If the academic staff member acknowledged the form and you wish to edit it please contact Academic Affairs office (consent from the academic will be required to modify an already acknowledged evaluation).

- Click on CANCEL to cancel changes made while in Edit in order to retain the original evaluation. The form closes and can be re-selected again by going back to the Introduction page and clicking on EDIT/VIEW, as necessary.

- Once the Chair submits, the staff member will receive a new email instructing them to login and view their evaluation and acknowledge. The previous evaluation will no longer be available.

- Once acknowledged by the staff member, the evaluation is locked and can only be viewed by clicking on the PDF at the far right. The evaluation can no longer be edited.

### 5.5 Deleting a form

- The evaluation can be deleted by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.

- Once the form is open, click on DELETE at the bottom of the page.

- Clicking on “Delete” while in Edit has the effect of deleting the evaluation form entirely and it will no longer be available to the staff member.

- The name of the academic staff member will remain on the list to be evaluated but the “X” under EVAL EXISTS will be gone and the evaluation must be re-done.

- Use “Delete” only when absolutely certain that a performance evaluation should be deleted rather than edited.
6 CONTRACT ACADEMIC STAFF – RESEARCH/PROFESSIONAL/TEACHING

6.1 Creating an Evaluation

Click on the Icon of the type to access the list of names of academic staff member

- Select a name from the list.

- Press on the EDIT/VIEW button to the left of the name to open the performance evaluation form for the individual.

- Complete the form as per instruction in next section: “Filling in the form”

- If the name of the academic staff member for whom you wish to create an evaluation does not appear in the list, contact the Academic Affairs Office for assistance.
At any time, if you would like to go back to the HOME Page, Click on the FACULTY OF MEDICINE title.

6.2 Filling in the form

The form is automatically populated with the evaluation period dates, name, and department. The previous 3 years evaluations, if applicable, are also available directly on the form for reference.

To fill out the performance evaluation, the following rules apply:

- At least 2 of the 3 categories as well as the “Professionalism & Collegiality” MUST be completed.
  
  **Categories:**
  1) **Teaching**
  2) Research & Other Scholarly Activities (evaluate either 2a OR 2b)
     a) Research
     b) Educational Scholarship (primarily for CAS (Teaching))
  3) **Administrative Contributions**

- The evaluation is done using a scale of 1 to 6, where 1 is the “lowest” and 6 is the “highest”.
- To enter the scores, click on the radio button next to the corresponding “Score” in the appropriate sub-category
- Complete as many sub-categories as is appropriate depending on the profile of the staff member being evaluated.

- Enter any “Comments/Major Achievements” as well as “Goals and Objectives for the coming year”, as required.

- Click on “Cancel” to erase the form if you want to start over. The academic’s name will still appear in the drop-down list on the Introduction page.

- **DO NOT USE the “BACK” button.** To return to the home page, click on the Faculty of Medicine title.

Sample evaluation form:
6.3 Submitting the form

- Click on “Create” at the bottom to save the form and submit it to the academic staff member.

- The academic staff member will automatically receive an email informing them that the evaluation has been submitted and instructing them to login to the ACADEMIC STAFF PORTAL to view and acknowledge their evaluation.

- The evaluation will remain available in the Chair’s list however an “X” will now appear in the “Eval Exists” column.
6.4 Editing a form

- The evaluation can be edited by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.

- Modify the evaluation form and click on “Create” at the bottom of the form.
  - You can only modify the evaluation if an academic did not acknowledge it yet. If the academic staff member acknowledged the form and you wish to edit it please contact Academic Affairs office (consent from the academic will be required to modify an already acknowledged evaluation).

- Click on CANCEL to cancel changes made while in Edit in order to retain the original evaluation. The form closes and can be re-selected again by going back to the Introduction page and clicking on EDIT/VIEW, as necessary.

- Once the Chair submits, the staff member will receive a new email instructing them to login and view their evaluation and acknowledge. The previous evaluation will no longer be available.

- Once acknowledged by the staff member, the evaluation is locked and can only be viewed by clicking on the PDF at the far right. The evaluation can no longer be edited.

6.5 Deleting a form

- The evaluation can be deleted by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.

- Once the form is open, click on DELETE at the bottom of the page.

- Clicking on “Delete” while in Edit has the effect of deleting the evaluation form entirely and it will no longer be available to the staff member.
The name of the academic staff member will remain on the list to be evaluated but the “X” under EVAL EXISTS will be gone and the evaluation must be re-done.

Use “Delete” only when absolutely certain that a performance evaluation should be deleted rather than edited.

7 CAS FULL-TIME CLINICAL EVALUATIONS

7.1 Creating an Evaluation

Click on the Icon to access the list of names of academic staff member.

For this evaluation type, it is a 2 step process. Most clinical departments have chosen to initiate the evaluation process at the Division level. The Division Director will create the evaluation and then submit for the Chair’s review and final approval.

2 sections will appear when you enter the CAS Clinical evaluations:
1. **Members to be evaluated by Dept. Chair:** this list is usually the Division Directors themselves as the Chair must evaluate them OR if the Chair chose not to use Division Directors then the full list of staff members to be evaluated will appear here and the second section will be empty.

2. **Evaluations submitted by Directors for approval by Dept. Chair:** this list will include all staff members who must first be evaluated by a Division Director.

There are 2 levels of evaluators for the CAS Clinical evaluations:

- Division Director Level
- Chair Level

**For DIVISION DIRECTORS level:**

- The top section should be blank; the names of those to be evaluated should only appear on the bottom section.
- If the name of the academic staff member for whom you wish to create an evaluation does not appear in the list, contact your AEC administrator or the Academic Affairs Office for assistance.
- Press on the EDIT/VIEW button to the left of the name to open the performance evaluation form for the individual.
- Complete the form as per instructions in next section “Filling in the form”.
- The evaluation is now ready to be reviewed by the Chair.

**For CHAIRS (2 separate lists):**

**Top section (Members to be evaluated by Dept. Chair):**

- This section will list everyone that is to be evaluated directly by the Chair.
- If the name of the academic staff member for whom you wish to create an evaluation does not appear in the list, contact your AEC administrator or the Academic Affairs Office for assistance.

- Press on the EDIT/VIEW button to the left of the name to open the performance evaluation form for the individual.

- Complete the form as per instruction in next section “Filling in the form”.

**Bottom Section (Evaluations submitted by Directors for approval by Dept. Chair):**

- This section will list everyone that is to be evaluated first by a Division Director.

- When an “X” appears in the column called “Eval Exists”, then the Division Director has already submitted the evaluation and it is ready for the Chair’s review.

- Press on the EDIT/VIEW button to the left of the name to open the performance evaluation form for the individual.

- The Chair must review the evaluation and submit as per detailed instructions in the next section “Filling in the form”.

- The evaluation is only complete once the Chair submits. Only then will the staff member be notified that the evaluation is ready.
7.2 Filling in the form

As mentioned in the previous section, there are 2 levels of evaluators for the CAS Clinical evaluations: Chair Level and Division Director Level.

For departments that have chosen to include both levels for the evaluation process, there are 2 steps to completing the evaluation form for a clinical staff member.

**STEP 1: INITIATING THE EVALUATION**

- The form is automatically populated with the evaluation period dates, name, and department.
- The previous 3 years evaluations, if applicable, are also available directly on the form for reference.
- To fill out the performance evaluation, the following rules apply:
  1. All fields are mandatory and must be scored.
  2. “Not applicable” may be used **ONLY** for Administration and Research.
  3. The evaluation is done using a scale of 1 to 6, where 1 is the “lowest” and 6 is the “highest”.
- To enter the scores, click on the radio button next to the corresponding “Score” in each of the six sub-categories.
- Enter any “Comments/Major Achievements” as well as “Goals and Objectives for the coming year”, as required.
- Click APPLY CHANGES/SUBMIT
- Click on “Cancel” to erase the form if you want to start over. The academic’s name will still appear in the drop-down list on the HOME page.
- If the submitter is identified as a Division Director level, then once he/she hits SUBMIT, the evaluation is now ready for the Chair’s review – Step 2.
- If the submitter was the Chair level, then the evaluation process proceeds to the “Submitting the form section”

**STEP 2: CHAIR’S REVIEW**

Once a Division Director has completed the form and submitted, the form must then be reviewed by the Chair.

- Click on EDIT/VIEW next to the person’s name to open the form
- The Chair can make any changes he/she feels necessary to the scores or comments etc.
• To submit, the Chair must click on the “I have reviewed the evaluation” at the bottom of the page and the hit APPLI CHANGES/SUBMIT

![Image of submission interface]

**NOTE:** If the Chair initiates and completes an evaluation for a staff member that was initially assigned to evaluate by a Division Director, the Division Director will be bypassed completely.

**DO NOT USE the “BACK” button.** To return to the home page, click on the Faculty of Medicine title.
Sample CAS clinical evaluation form:

![Clinical Evaluation Form](image)

**Faculty of Medicine - Academic Performance Evaluation**

**Academic:** Clinical Medicine  
**Org:** MedT Testing Cogn (R&I/UCD)

**Previous years evaluations**  
no data found

**Teaching (must be evaluated)**

- Quality of Teaching Classroom (Clinical)
- Quality of Teaching (Including Graduate Students)
- Clinical Contributions (must be evaluated)
- Quality of Clinical Contributions (Good decision making and compassionate care)
- Quality of Clinical Contributions (Clinical text)
- Clinical Innovation
- Reliability/Punctuality

**Administration**

- Clinical Site Administration
- University Administration
- Outside Organizations (eg: Conference planning, execution of professional bodies, consulting to governments, community service)

**Professionism & Collegenality (must be evaluated)**

- Professionalism & Collegenality

**Research**

- Quantity and Quality of Publications
- Grants & Awards Received
- Scientific & Scholarly Activities (eg: grant panels, editorial or review activities, invitations to present research)

**Comments/Other Achievements:**

**Goals and objectives for the coming year:**

**I have reviewed the evaluation:**

[ ] Yes  
[ ] No

[Delete] [Apply changes/Submit] [Cancel]
7.3 Submitting the form

- Click on “Apply Changes/Submit” at the bottom to save the form and submit it to the academic staff member.

- The academic staff member will automatically receive an email informing them that the evaluation has been submitted and instructing them to login to the ACADEMIC STAFF PORTAL to view and acknowledge their evaluation.

- The evaluation will remain available in the Chair’s list however an “X” will now appear in the “Eval Exists” column.

7.4 Editing a form

- The evaluation can be edited by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.

- Modify the evaluation form and click on “Apply Changes” at the bottom of the form. You can only modify the evaluation if an academic did not acknowledge it yet. If the academic staff member acknowledged the form and you wish to edit it please contact Academic Affairs office.

- Click on CANCEL to cancel changes made while in Edit in order to retain the original evaluation. The form closes and can be re-selected again by going back to the Introduction page and clicking on EDIT/VIEW, as necessary.

- Once the Chair submits, the staff member will receive a new email instructing them to login and view their evaluation and acknowledge. The previous evaluation will no longer be available.

- Once acknowledged by the staff member, the evaluation is locked and can only be viewed by clicking on the PDF at the far right. The evaluation can no longer be edited.
7.5 Deleting a form

- The evaluation can be deleted by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.

- Once the form is open, click on DELETE at the bottom of the page.

- Clicking on “Delete” while in Edit has the effect of deleting the evaluation form entirely and it will no longer be available to the staff member.

- The name of the academic staff member will remain on the list to be evaluated but the “X” under EVAL EXISTS will be gone and the evaluation must be re-done.

- Use “Delete” only when absolutely certain that a performance evaluation should be deleted rather than edited.
8  ACADEMIC ASSOCIATES UNRANKED CAS

8.1  Creating an Evaluation

Click on the Icon of the type to access the list of names of academic staff member

**Faculty of Medicine - Academic Performance Evaluation**

<table>
<thead>
<tr>
<th>Performance Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click on image</td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td>Full-time tenure-stream and Full-time CAS (Research or Professional)</td>
</tr>
<tr>
<td>Full-time CAS (clinical)</td>
</tr>
<tr>
<td>Academic Associate Unranked CAS</td>
</tr>
</tbody>
</table>

- Select a name from the list.

- Press on the EDIT/VIEW button to the left of the name to open the performance evaluation form for the individual.

- Complete the form as per instruction in next section: “Filling in the form”

- If the name of the academic staff member for whom you wish to create an evaluation does not appear in the list, contact your AEC administrator or the Academic Affairs Office for assistance.

- To go back to the HOME Page, Click on the FACULTY IF MEDICINE Title.
8.2 Filling in the form

The form is automatically populated with the evaluation period dates, name, and department. The previous 3 years evaluations, if applicable, are also available directly on the form for reference.

To fill out the performance evaluation, the following rules apply:

- A score is required for each of the 9 categories. Include comments;
- The evaluation is done using a scale of 1 to 6, as follows:

  1 = Fails to Achieve Expectations  
  2 = Needs Improvement  
  3 = On track to meeting expectations  
  4 = Fully Achieves Expectations  
  5 = Consistently Surpasses Expectations  
  6 = Exceptional Performance

- To enter the scores, click on the radio button next to the corresponding “Score” in each of the 9 sub-categories.

- Click on “Cancel” to erase the form if you want to start over. The academic’s name will still appear in the drop-down list on the Home page.

- **DO NOT USE the “BACK” button.** To return to the home page, click on the Faculty of Medicine title.
Sample Academic Associate Evaluation form:

Faculty of Medicine - Academic Performance Evaluation

ACADEMIC PERFORMANCE EVALUATION
EVALUATION PERIOD: 01 JAN 2015 TO 31 DEC 2015

Academic: Karkatsouki/Angela
Org: Testing Orgn

Previous years evaluations
no data found

SKILLS FOR SUCCESS - APPRAISAL AND DEVELOPMENT

The following key skills are essential for all staff in achieving success in their positions. Depending upon position requirements, other job-specific skills may be required of a staff member.

Instructions: Select and comment on the performance level demonstrated by the staff member during the review period for the following skill areas using the following scale of 1-6

1 = Falls to Achieve Expectations
2 = Needs Improvement
3 = On track to meeting expectations
4 = Fully Achieves Expectations
5 = Consistently Surpasses Expectations
6 = Exceptional Performance

Categories of Evaluation

1. Job Knowledge
   - Demonstrates the knowledge and skills required to perform the job, including administrative policies and procedures, technical and/or specialized knowledge/expertise and managerial/leadership skills.
   - Understands position goals, responsibilities, and expectations.
   - Is current on professional/technical developments related to position.

2. Stewardship
   - Demonstrates accountability in all work responsibilities.
   - Exercises sound and ethical judgment when acting on behalf of the university.
   - Exercises appropriate confidentiality in all aspects of work.
   - Shows commitment to work and to consequences of own actions.

3. Communication
   - Demonstrates the ability to express thoughts clearly, both orally and in writing.
   - Demonstrates effective listening skills.
   - Shares knowledge and information.
   - Ask's questions and offers input for positive results.

4. Motivation
   - Shows initiative, anticipates needs and takes actions.
   - Demonstrates innovation, creativity and informed risk-taking.
   - Engages in problem-solving; suggests ways to improve performance and be more efficient.
   - Stresses to achieve individual, unit, and university goals.

5. Teamwork
   -

Click here to enter comments
8.3 Submitting the form

- Click on “Apply Changes” at the bottom to save the form and submit it to the academic staff member.
- The academic staff member will automatically receive an email informing them that the evaluation has been submitted and instructing them to login to the [ACADEMIC STAFF PORTAL](#) to view and acknowledge their evaluation.
- The evaluation will remain available in the Chair’s list however an “X” will now appear in the “Eval Exists” column.
8.4 Editing a form

- The evaluation can be edited by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.

- Modify the evaluation form and click on “Apply Changes” at the bottom of the form. You can only modify the evaluation if an academic did not acknowledge it yet. If the academic staff member acknowledged the form and you wish to edit it please contact Academic Affairs office.

- Click on CANCEL to cancel changes made while in Edit in order to retain the original evaluation. The form closes and can be re-selected again by going back to the Introduction page and clicking on EDIT/VIEW, as necessary.

- Once the Chair submits, the staff member will receive a new email instructing them to login and view their evaluation and acknowledge. The previous evaluation will no longer be available.

- Once acknowledged by the staff member, the evaluation is locked and can only be viewed by clicking on the PDF at the far right. The evaluation can no longer be edited.

8.5 Deleting a form

- The evaluation can be deleted by clicking on the EDIT/VIEW button to the left of the academic’s name as long as the staff member has yet to acknowledge.

- Once the form is open, click on DELETE at the bottom of the page.

- Clicking on “Delete” while in Edit has the effect of deleting the evaluation form entirely and it will no longer be available to the staff member.

- The name of the academic staff member will remain on the list to be evaluated but the “X” under EVAL EXISTS will be gone and the evaluation must be re-done.

- Use “Delete” only when absolutely certain that a performance evaluation should be deleted rather than edited.
9 ACKNOWLEDGING AN EVALUATION

Once the Chair has submitted the evaluation, the staff member will automatically receive an email informing them that their evaluation has been submitted by their immediate supervisor and includes instructions on how to view the evaluation.

The staff member must log in to the ACADEMIC STAFF PORTAL (http://www.mcgill.ca/medicine-academic/academic-staff-portal) using their McGill credentials (firstname.lastname@mcgill.ca).
If logging in for the first time, the staff member will be asked to create their **Academic Profile**. Once completed the first time, it does not have to be redone again, although it can be edited.

There are 4 sections to be completed:

- Wellness Survey
- Code of Conduct
- Conflict of Interest
- Employment Equity Survey

**Academic Profile:**

**Faculty of Medicine Wellness Survey:** the staff member must respond to the two wellness-related questions presented. The second question refers to an “anonymous survey about workplace wellness”. If the staff member agrees to answer this anonymous survey by selecting “Yes”, they will be prompted by email to complete a follow up survey about workplace wellness using a provided web-link.

**Faculty of Medicine Code of Conduct:** the staff member must acknowledge that they have read and agree to adhere to the Faculty of Medicine’s Code of Conduct. A link to the Code of Conduct is provided.

**Conflict of Interest:** the staff member must acknowledge that they have read agreed to adhere to **McGill University's Regulation on Conflict of Interest**. A link to the policy is provided.
**Employment Equity Survey:** 4 short questions to complete in order for the Faculty to be able to provide statistical data for accreditation purposes. There is an option to opt out. A link to McGill’s Employment Equity policy is provided.

<table>
<thead>
<tr>
<th>SECTION A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Do you have a disability, that is, a significant or persistent physical, mental, psychiatric, sensory, developmental or learning impairment?</td>
</tr>
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</table>

<table>
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<tr>
<th>SECTION B</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Are you an aboriginal person? Inuit, Métis or North American Indian, status or non-status, are considered aboriginal peoples.</td>
</tr>
<tr>
<td>3. Are you an individual, other than an aboriginal person, who is visible by race or colour from the majority of Canadians?</td>
</tr>
<tr>
<td>4. If you answered &quot;No&quot; to questions 2 and 3, is your mother tongue (first language learned and still understood) a language other than French or English?</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>SECTION C</th>
</tr>
</thead>
<tbody>
<tr>
<td>I do not wish to complete the survey at this time.</td>
</tr>
</tbody>
</table>

- Once the Academic Profile is completed, the Performance Evaluation section will become available.
The evaluations appear chronologically by year and are always available to the staff member.

To view the evaluation, click on the PDF icon.

The evaluation will open in pdf format.

If an academic staff member disagrees with the performance evaluation, discussion should occur with the Chair or Director BEFORE acknowledging.

- If an evaluation is amended, a second email will be sent to the academic and the original evaluation is voided automatically. If the evaluation is not amended, the original evaluation is still active to acknowledge receipt.

To acknowledge the evaluation, click on the ACKNOWLEDGE link.

- By acknowledging the evaluation, the academic staff member acknowledges having seen the evaluation, but does not necessarily agree with its content.

The date of acknowledgment will automatically appear in the ACKNOWLEDGE ON column.

Once acknowledged by the staff member, the evaluation is locked and cannot be modified. The PDF will still be available and the evaluation can still be viewed at any time.
- The Chair can then view on the Academic Performance evaluation HOME page, the date the evaluation was acknowledged, next to the name of each academic staff member for whom a performance evaluation was created.

- Should the academic staff member never acknowledge the form, for whatever reason, the evaluation as completed by the Chair will be available to both the department and Academic Affairs; however the evaluation process remains incomplete. For those eligible for salary policy, it may affect their allocation and incomplete evaluation also has an impact on accreditation as this is one of the standards.

For assistance with the on-line system, please contact the Academic Affairs Office.

Faculty of Medicine - Academic Affairs Office
3605 de la Montagne, Montreal, QC H3G 2M1
Tel : (514) 398-5879
Email : acadsec.med@mcgill.ca