



Classified Staff Performance Appraisal

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Using the Classified Staff Performance Appraisal (Acrobat PDF Form)

Getting Started:

Using a Web Version vs. a Downloaded Copy:

To fill-in the appraisal form, you have the option of using an Internet browser or downloading the form to your local computer. PDF forms work either way but downloading (saving) the appraisal form is recommended for several reasons. Because the appraisal form includes a number of features, the size of the file is large (over 1 MB) so performance varies in different computing environments. In addition some of the essential features of Adobe Acrobat supervisors will need are not available within a web browser. Also those who share a microcomputer with other employees may not realize that the contents of a form remain saved in a web browser unless the form is cleared.

Downloading the Form:

For downloading there are files in three different formats. Two of these are compressed specifically for downloading, one for each platform. In order to decompress these files, a *recent* version of a decompression application is required. StuffIt Expander for the Macintosh and WinZip for the PC are the supported applications for this purpose. The third file is a self-extracting executable for Windows users that will automatically run and place the form on the computer. A final, less expeditious way to download the form would be to, on the link to the web browser version, click and hold while using a Macintosh or right click with a Windows machine. This brings up a menu you can use to “save the link” or save the file to the local computer.

Using Adobe Acrobat or Adobe Acrobat Reader:

If you plan to use Adobe Acrobat Reader and you do not have Adobe Acrobat installed, you can open the form by double-clicking on the icon. If you have both Adobe Acrobat and Adobe Acrobat Reader installed on your system, you need to make sure you are using the appropriate software. Otherwise you may not be able to save the data or the file once it is filled in. The program launched when you just click on the icon is currently set as your default application. If that is not the program you need to use, launch the application first and then open the file from inside the application.

Note: Those using Adobe Acrobat Reader to fill in their data should NOT close the file before completing and printing their form or the data will be lost.

Filling out the Form:

Entering Data:

To begin filling in the form after opening it, make sure that the “hand tool” is selected. (Generally, the hand tool is selected by default upon opening Acrobat.) Then click in the place where the employee’s name belongs and begin to type. The text will appear as typed. Any text entered into a text area will wrap as a line is filled.

Moving through the Form:

To continue to the next item in the form, either press the tab key or click within the box in the next position. .

Selecting a Rating:

When you move your mouse over a specific rating circle, the name of the rating associated with that number will be displayed. This is accomplished through JavaScript.

Clearing the Form:

In order to clear the entire form at any point (basically to start over), click the “Clear Form” button at the top or bottom of the entire form. Doing this will erase all information included on the form.

Zooming In/Out:

To better view items within the form, one may use the magnifying glass button on the toolbar to zoom in and out on the form.

Deselecting Items:

One important thing to note is that information entered into the form will only be recognized after that item is deselected. Deselecting an item can be done through pressing the tab key, pressing return, or clicking outside of the box.

Text Limitations:

Only text seen after an item has been deselected will be printed in the form. Therefore, the amount of text entered cannot exceed the size of the box being filled in. However, the form was designed to have plenty of space for comments so overflow of the text boxes should not be a problem.

Other items to note:

- When entering information, the dates may be provided in a variety of formats as long as they are in month, day, year order. Once entered, the date will result in a standard format (MM/DD/YY).
- The totals and averages are “read-only” and, therefore, cannot be edited.
- The signatures and dates associated with them may only be filled in once the form has been printed.

Mathematical Calculations:

Determining Section Totals and Averages:

The section totals come from adding all of the points for that section together. The values for each individual question range from 5 (for outstanding performance) to 1 (for unsatisfactory performance). A response of not applicable would be given a value of 0. The total comes from summing these values. A section average is determined by dividing this total by the number of general factors with a rating of 1-5. Not applicable ratings and non-answered questions are not included. For example, if an employee receives ratings of 5, 4, 5, na, 3, and 3, the total would be 20 and the average would be 4 (20 / 5).

Determining the Final Total and Average:

Intuitively, the grand total is derived through adding all of the section totals. The final average is determined through dividing the total points by the total number of general factors with a rating from 1-5. This average is NOT an average of the section averages!

Completing the Form:

Once the form has been finished, the information must somehow be stored to possibly be viewed at a later time.

Printing the Form:

The only option for 'saving' information through the use of Adobe Acrobat Reader is through printing the completed form. Acrobat Reader DOES NOT have a "save" option for form data. To print the form, click the "Print" button at the top or bottom of the form or choose Print from the File menu. With the full version of Adobe Acrobat, you can use the same methods to print the completed form; however, other more appropriate options exist for saving the information.

Saving the Form:

In order to save a completed (or partially completed) form, use the Save As (or Save) function under the File menu. Make sure that a different name is used for the evaluation forms of separate employees in order to not lose data. Also, it may be wise to save the form periodically as with any computer file.

Saving Data in FDF Format:

Another option for saving form data is to export the form information as an FDF file. An FDF file is essentially a type of file containing only the data entered into a form and not the form information itself. This FDF file creates a special association with the original form. When opened, the FDF file populates the PDF form with the saved data. This feature is a powerful one as it greatly decreases the size of the file and, in essence, eases the job of a supervisor who supervises multiple employees. In order to use this option, choose Export and then Form Data from the File Menu of the full version of Adobe Acrobat.