



STAFF PERFORMANCE EVALUATIONS

University of Montevallo Human Resources

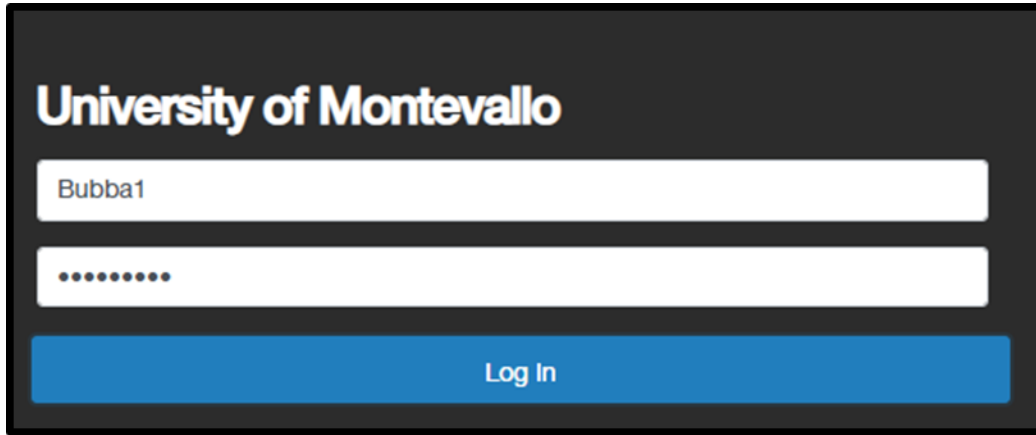
2020

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How to Log-In

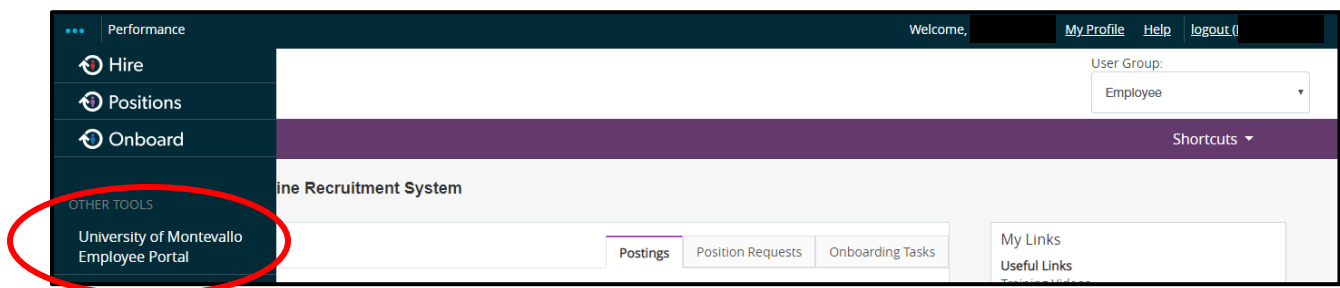
1. Go to: <https://jobs.montevallo.edu/hr/>



2. Log in using your UM username and password (Note: Your screen color and menu choices may look different than the one pictured based on your user roles and defaults).
3. Click on the "three dots next to Performance." If you do not see this icon, call Human Resources at 6055.



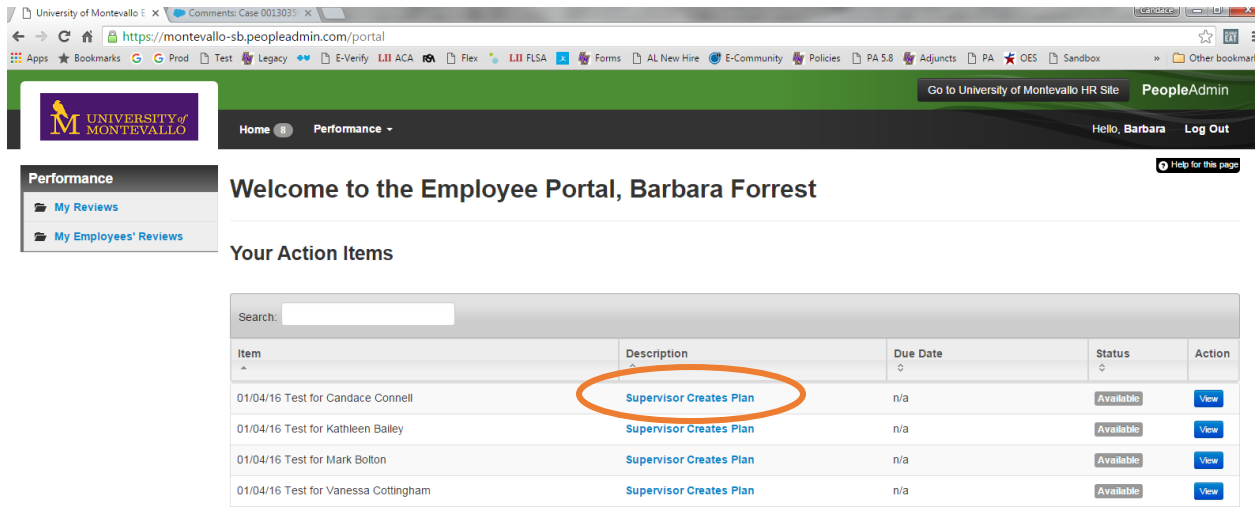
4. Click "University of Montevallo Employee Portal." If you do not see this icon, call Human Resources at 6055.



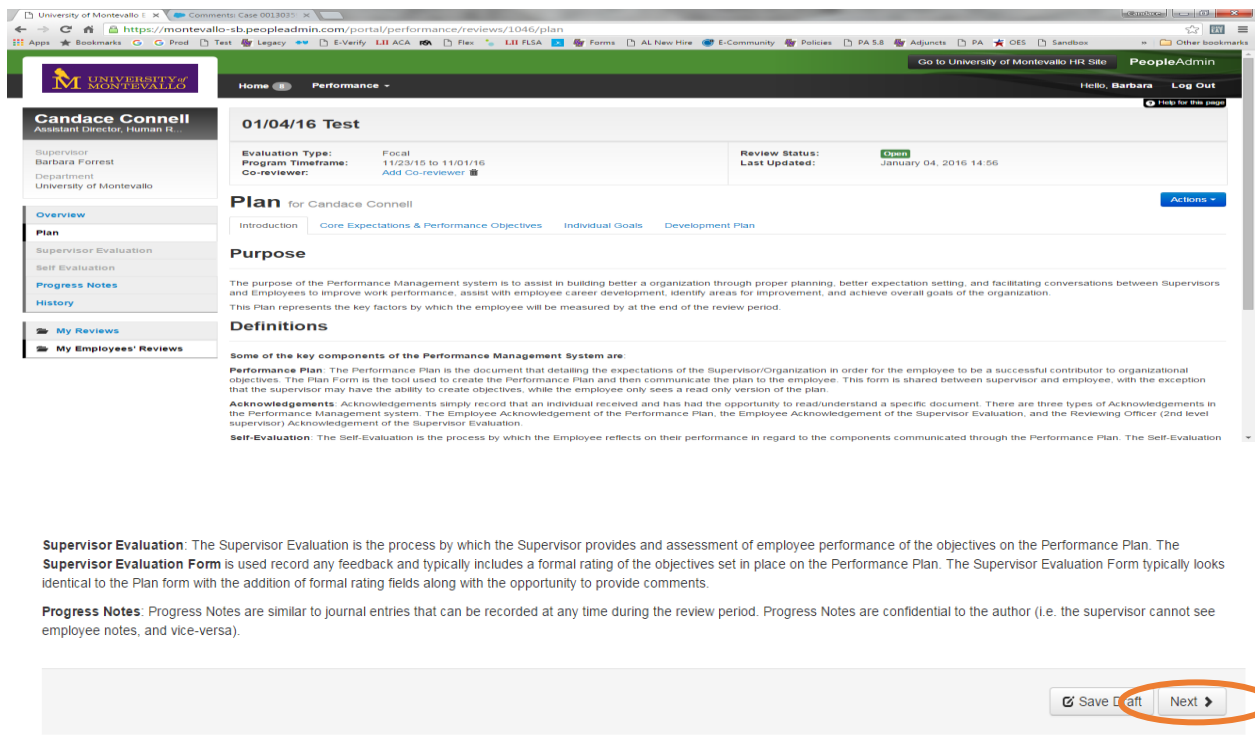
5. The system will default to your open action items.

STEP 1: SUPERVISOR CREATES THE PLAN (New Employees Only)

1. If you are a supervisor, your first step will be “Supervisor Creates Plan” for each employee you supervise. **This step must be completed before the employee can acknowledge the plan and begin his or her self-evaluation.** Click on “Supervisor Creates Plan” to open the plan.



2. You may review the purpose and definitions. Scroll to the bottom of the page and click “Next.”



3. Core Expectations & Performance Objectives list the competencies by which all UM employees will be rated on during the self-evaluation and supervisor evaluation processes. There is no action to take on these items during the planning process.

4. Scroll to the bottom of the page and click “Next.”

Plan for Candace Connell Actions ▾

[Introduction](#) [Core Expectations & Performance Objectives](#) [Individual Goals](#) [Development Plan](#)

Core Expectations are those competencies by which everyone in the organization is measured. These Core Expectations allow The University of Montevallo to drive organizational goals, enforce cultural and behavioral attitudes, and set the entire organization on the same path toward success.

Core Expectations & Performance Objectives

Competency
PRODUCTIVITY:
Type
CORE EXPECTATIONS
Description
Consider the amount of work the employee produces.

Competency
WORK QUALITY:
Type
PERFORMANCE OBJECTIVE
Description
Consider the accuracy, thoroughness and timeliness of the employee's work.

[Save Draft](#) [Next >](#)

5. Individual goals must be established during the planning process. **Supervisors are expected to develop goals and development activities with employee input before submitting them into the system.** A minimum of three goals are highly recommended. Enter all required information for the first goal. You may also set a “Target Completion Date” (not required). Click “Add Entry” and enter all required information for the second goal. Continue this process until all goals have been entered. Click “Next.” Your 2018 goals established in 2018 will automatically fee into your 2018 self-evaluation.

This section is to be completed as a collaborative assessment by the supervisor and employee. Goals and Development Activities should align with the University's mission, vision, values, goals and objectives (from an institutional and unit perspective).

Introduction Core Expectations & Performance Objectives Individual Goals Development Plan

Required fields are indicated with an asterisk (*).

Check spelling

Individual Goals

* Individual Goal Name
Implement online performance evaluation

* Goal Type
Professional

* Individual Goal Description
Develop online evaluations through PeopleAdmin and train all users on the new system.

Target Completion Date
02/12/2018

Remove Entry?

Add Entry

Save Draft

Next

- 6. Development Activities are optional. If desired, enter the information for the first activity. If you do not need to enter a second activity, Click "Complete." If you want to enter more than one activity, click "Add Entry" and enter all required information for the second activity. Continue this process until all activities have been entered. Click "Complete."

Development Activities

The purpose of recording developmental activities is to formalize and track any activities toward performance improvement, career advancement, training, education, etc. Developmental Activities are NOT rated at the end of the review period, but will be reviewed for progress and future planning.

* Development Activity
Attend annual employment law update

* Development Activity Description
Attend Birmingham SHRM Legal Update to learn about employment law changes that may affect the University.

* Target Completion Date
05/31/2016

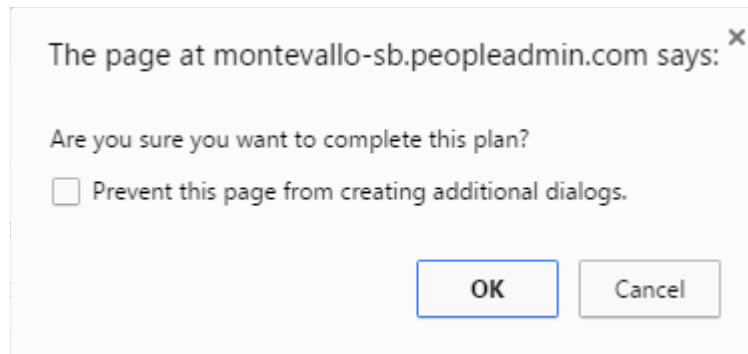
Remove Entry?

Add Entry

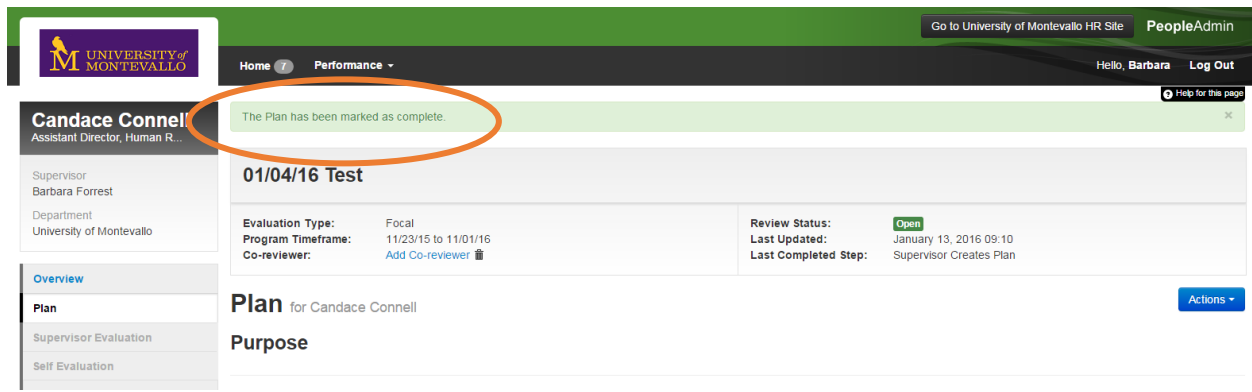
Save Draft

Complete

7. A pop-up warning will appear. Click “Ok.” Please note that you will not be able to make changes to the plan after clicking “Ok.” If you need to make changes and do not wish to proceed, click “Cancel.”

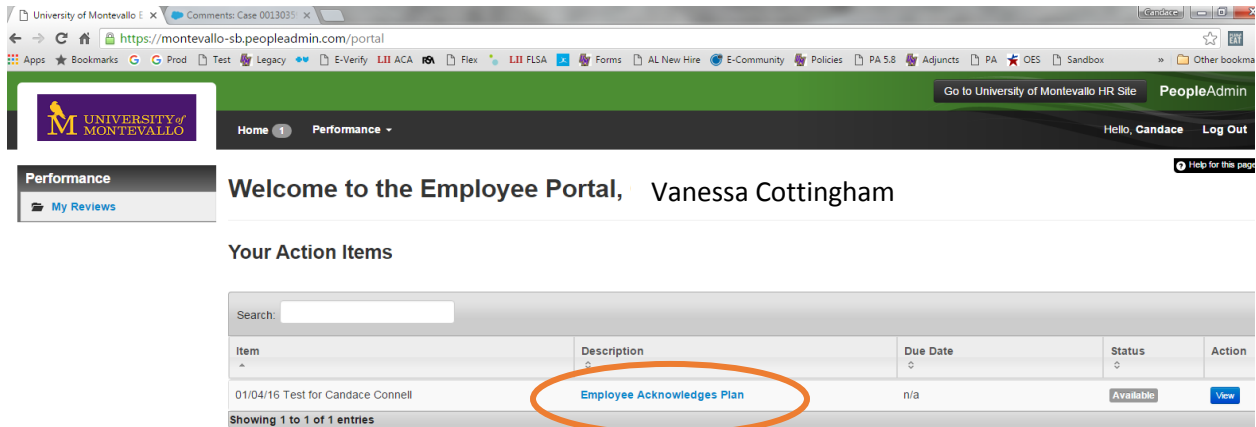


8. You will see a note that the plan was created successfully.



STEP 2: EMPLOYEE ACKNOWLEDGES PLAN

1. From “Your Action Items” on the Employee Portal, click “Employee Acknowledges Plan.” If you do not see this action item, contact your supervisor.

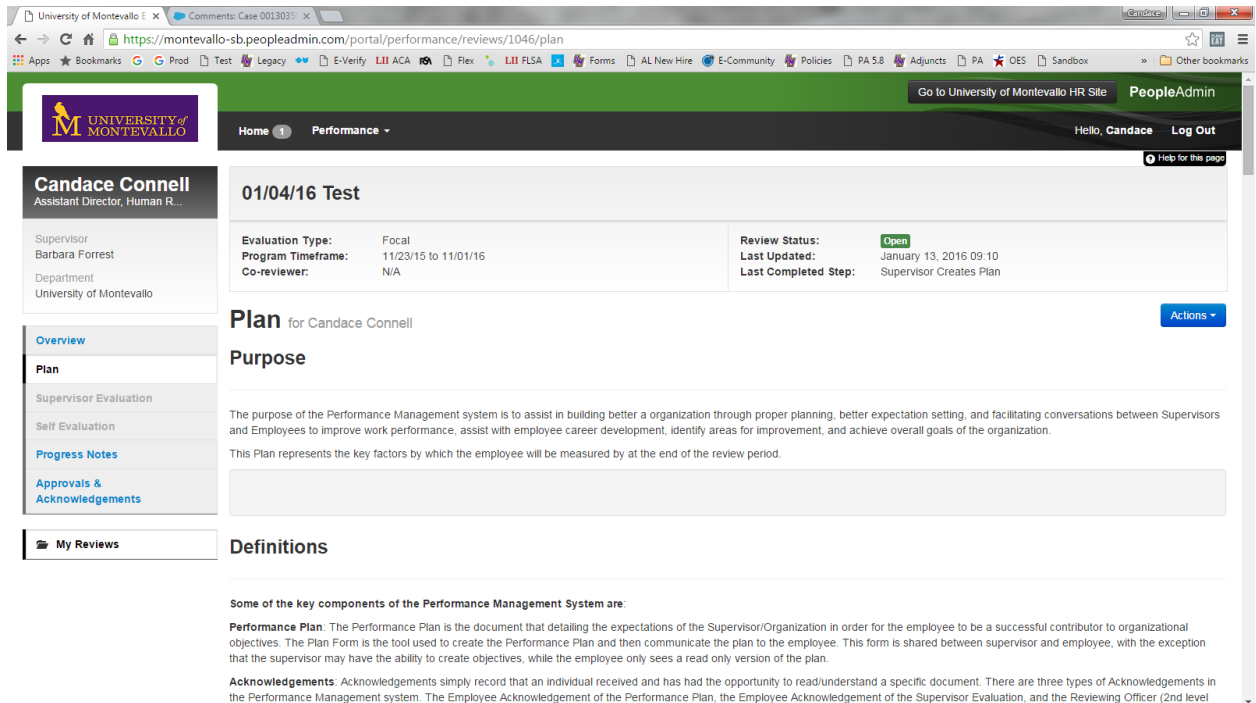


The screenshot shows the University of Montevallo Employee Portal. The user is logged in as Candace. The page title is "Welcome to the Employee Portal, Vanessa Cottingham". Under the "Your Action Items" section, there is a table with one entry:

Item	Description	Due Date	Status	Action
01/04/16 Test for Candace Connell	Employee Acknowledges Plan	n/a	Available	View

The "Employee Acknowledges Plan" link is circled in orange.

2. Scroll through the page to view the Purpose, Definitions, Core Expectations & Performance Objectives, Goals, and Development Activities. Please note that you are not rated on any of these items during the planning process.



The screenshot shows the "01/04/16 Test" page for Candace Connell. The page includes a sidebar with navigation options: Overview, Plan, Supervisor Evaluation, Self Evaluation, Progress Notes, Approvals & Acknowledgements, and My Reviews. The main content area shows the "Plan" for Candace Connell, including the "Purpose" and "Definitions" sections.

Purpose

The purpose of the Performance Management system is to assist in building better a organization through proper planning, better expectation setting, and facilitating conversations between Supervisors and Employees to improve work performance, assist with employee career development, identify areas for improvement, and achieve overall goals of the organization. This Plan represents the key factors by which the employee will be measured by at the end of the review period.

Definitions

Some of the key components of the Performance Management System are:

- Performance Plan:** The Performance Plan is the document that detailing the expectations of the Supervisor/Organization in order for the employee to be a successful contributor to organizational objectives. The Plan Form is the tool used to create the Performance Plan and then communicate the plan to the employee. This form is shared between supervisor and employee, with the exception that the supervisor may have the ability to create objectives, while the employee only sees a read only version of the plan.
- Acknowledgements:** Acknowledgements simply record that an individual received and has had the opportunity to read/understand a specific document. There are three types of Acknowledgements in the Performance Management system. The Employee Acknowledgement of the Performance Plan, the Employee Acknowledgement of the Supervisor Evaluation, and the Reviewing Officer (2nd Level

3. Enter any comments into the comment box at the bottom of the page. These comments are not private; your supervisor and reviewing officer will be able view these comments.

4. Click “Acknowledge.”

Development Activities

The purpose of recording developmental activities is to formalize and track any activities toward performance improvement, career advancement, training, education, etc. Developmental Activities are NOT rated at the end of the review period, but will be reviewed for progress and future planning.

Development Activity
Attend annual employment law update

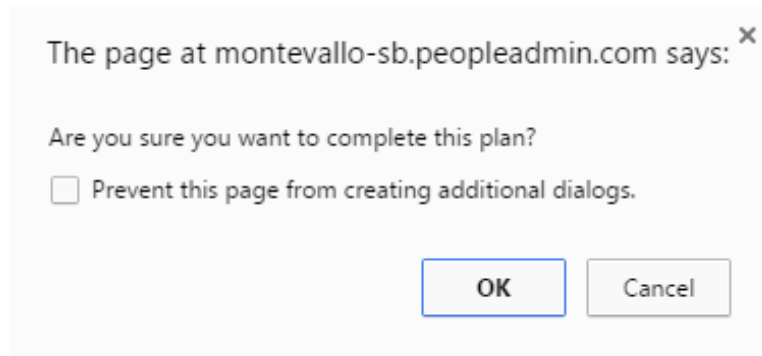
Development Activity Description
Attend Birmingham SHRM Legal Update to learn about employment law changes that may affect the University.

Target Completion Date
2016-05-31

Comment

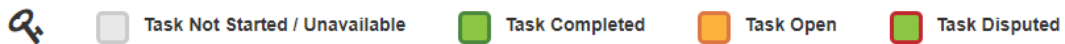
[Acknowledge](#)

5. A pop-up warning will appear. Click “OK.” Please note that you will not be able to make changes to your comment after clicking “OK.” If you need to make changes and do not wish to proceed, click “Cancel.”



6. You will see the message, “Your acknowledgement was recorded.” You can see the status and the responsible parties for each step in the review process.

Review Detail Dashboard Key



STEP 3: MID-YEAR CHECK-IN (OPTIONAL)

1. From “Your Action Items” on the Employee Portal, click “Mid-Year Check-In.”

Welcome to the Employee Portal, Barbara Forrest

Your Action Items

Item	Description	Due Date	Status	Action
01/04/16 Test for Candace Connell	Mid-Year Check-In	n/a	Available	View
01/04/16 Test for Kathleen Bailey	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Mark Bolton	Supervisor Creates Plan	n/a	Available	View

2. Click “Complete.” The Mid-Year Check-In is to confirm that you had a performance meeting with the employee. It is strongly encouraged that the items discussed during this meeting be documented through the Progress Notes or some other form of documentation for your files.

01/04/16 Test

Evaluation Type: Focal	Review Status: Open
Program Timeframe: 11/23/15 to 11/01/16	Last Updated: January 13, 2016 09:18
Co-reviewer: Add Co-reviewer	Last Completed Step: Employee Acknowledges Plan

Mid-Year Check-In

[Complete](#)

STEP 4: SELF-EVALUATION (Start here)

1. From “Your Action Items” on the Employee Portal, click “2019 Evaluation for ...”

Welcome to the Employee Portal, Vanessa Cottingham

Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018 Evaluation Period for Vanessa Cottingham	Employee Self-Evaluation	2019-04-10 Due in 3 months	Upcoming

Showing 1 to 1 of 1 entries

You may review the purpose and definitions. Scroll to the bottom of the page and click “Next.”

Definitions

Some of the key components of the Performance Management System are:

Performance Plan: The Performance Plan is the document that detailing the expectations of the Supervisor/Organization in order for the employee to be a successful contributor to organizational objectives. The Plan Form is the tool used to create the Performance Plan and then communicate the plan to the employee. This form is shared between supervisor and employee, with the exception that the supervisor may have the ability to create objectives, while the employee only sees a read only version of the plan.

Acknowledgements: Acknowledgements simply record that an individual received and has had the opportunity to read/understand a specific document. There are three types of Acknowledgements in the Performance Management system. The Employee Acknowledgement of the Performance Plan, the Employee Acknowledgement of the Supervisor Evaluation, and the Reviewing Officer (2nd level supervisor) Acknowledgement of the Supervisor Evaluation.

Self-Evaluation: The Self-Evaluation is the process by which the Employee reflects on their performance in regard to the components communicated through the Performance Plan. The Self-Evaluation Form is used to record the self-assessment and typically looks identical to the **Plan Form** with the addition of a field to record feedback on how the employee perceives they have performed in relation to the stated objective.

Supervisor Evaluation: The Supervisor Evaluation is the process by which the Supervisor provides an assessment of employee performance of the objectives on the Performance Plan. The **Supervisor Evaluation Form** is used to record any feedback and typically includes a formal rating of the objectives set in place on the Performance Plan. The Supervisor Evaluation Form typically looks identical to the Plan form with the addition of formal rating fields along with the opportunity to provide comments.

Progress Notes: Progress Notes are similar to journal entries that can be recorded at any time during the review period. Progress Notes are confidential to the author (i.e. the supervisor cannot see employee notes, and vice-versa).

Save Draft Next >

2. Carefully review each competency and rate yourself accordingly (using whole numbers only). Ratings can be entered by clicking on the rating scale or by entering the number in the number box. **Each rating of a 1 or 4 requires supporting narrative and documentation.** When you have finished each competency, click “Next.”

Core Expectations & Performance Objectives

Competency:

PRODUCTIVITY:

Description:

Consider the amount of work the employee produces.

Type

Rating

1 2 3 4 3

Comments

Don't forget - each score of 1 or 4 requires a narrative or supporting documentation!

Competency:

WORK QUALITY:

Description:

Consider the accuracy, thoroughness and timeliness of the employee's work.

Type

Rating

1 2 3 4 3

Comments

Comments for a score of 2 or 3 are optional.

Save Draft

3. Review the Individual Goals. Complete the assessment and comments for each goal listed. Click "Next" when complete.

Individual Goals

Individual Goal Name:

Implement online performance evaluations

Individual Goal Description:

Develop online evaluations through PeopleAdmin and train all users on the new system.

Goal Type:

Professional

Self-Assessment
Accomplished

Comments

Save Draft Next >

4. Review the Development Plan. Complete the assessment and comments for each activity listed. Click "Next" when complete.

Development Plan

The purpose of recording developmental activities is to formalize and track any activities toward performance improvement, career advancement, training, education, etc. Developmental Activities are NOT rated at the end of the review period, but will be reviewed for progress and future planning.

Development Activity Description:

Attend Birmingham SHRM Legal Update to learn about employment law changes that may affect the University.

Development Activity:

Attend annual employment law update

Target Completion Date:

2016-05-31

Comments

Save Draft Next >

5. Enter required information for Performance Competencies.

Self Evaluation for Candace Connell Actions ▾

[Introduction](#) [Core Expectations & Performance Objectives](#) [Individual Goals](#) [Development Plan](#) [Overall Performance](#) [Attachments](#)

Required fields are indicated with an asterisk (*).

Performance Competencies

* 1. What qualities do you have as an employee that contribute to your effectiveness?

* 2. Describe areas of your performance where you think improvement may be needed.

* 3. Describe any training or instruction that you believe would assist your performance.

Remove Entry?

6. The Overall Rating does not calculate on the Self Evaluation. Enter any comments regarding your overall performance for the year. Click "Complete."

Overall Rating

Comments

7. Individual goals for the next evaluation year can be established during this planning process. **Remember Supervisors are expected to develop goals with employee input and will be submitted into the system on the Supervisors evaluation document (2019 goals).**

Future Goals

Individual Goal Name

Individual Goal Description

Goal Type

Please select ▾

Target Completion Date

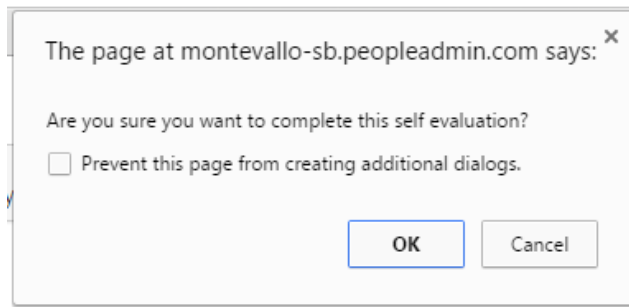
Comments

Remove Entry?

[Add Entry](#) [Save Draft](#) [Complete](#)

Attachments are optional, but remember to attach them before completing the self-evaluation! See “Attaching Supporting Documentation” in this document for more information.

- 8. A pop-up warning will appear. Click “OK.” Please note that you will not be able to make changes to your evaluation after clicking “OK.” If you need to make changes and do not wish to proceed, click “Cancel.”

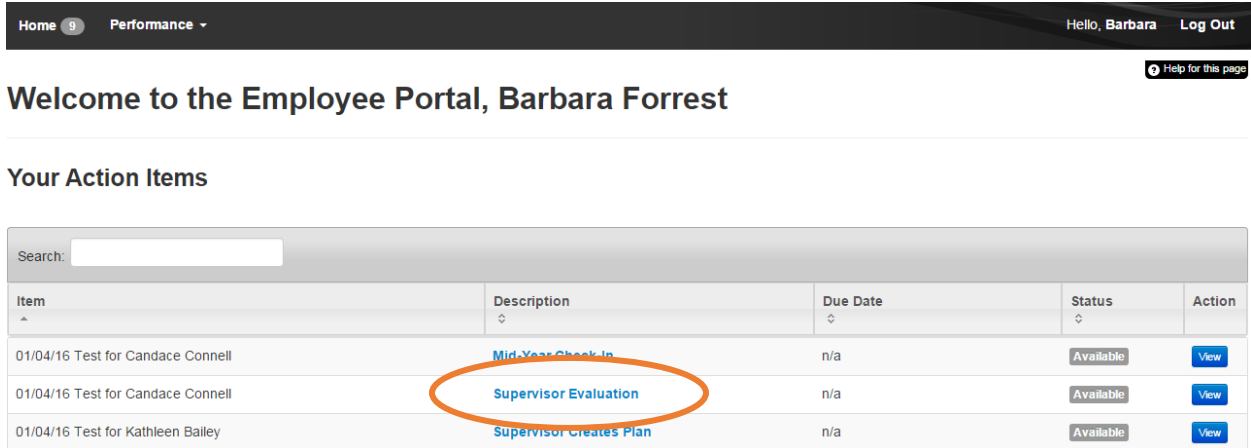


- 9. You will see the message, “The Self Evaluation has been marked as complete.”

Candace Connell Assistant Director, Human R...	01/04/16 Test
Supervisor: Barbara Forrest Department: University of Montevallo	Evaluation Type: Focal Program Timeframe: 11/23/15 to 11/01/16 Co-reviewer: N/A
	Review Status: Open Last Updated: January 13, 2016 10:27 Last Completed Step: Employee Self-Evaluation

STEP 5: SUPERVISOR EVALUATION

1. From “Your Action Items” on the Employee Portal, click “Supervisor Evaluation.”



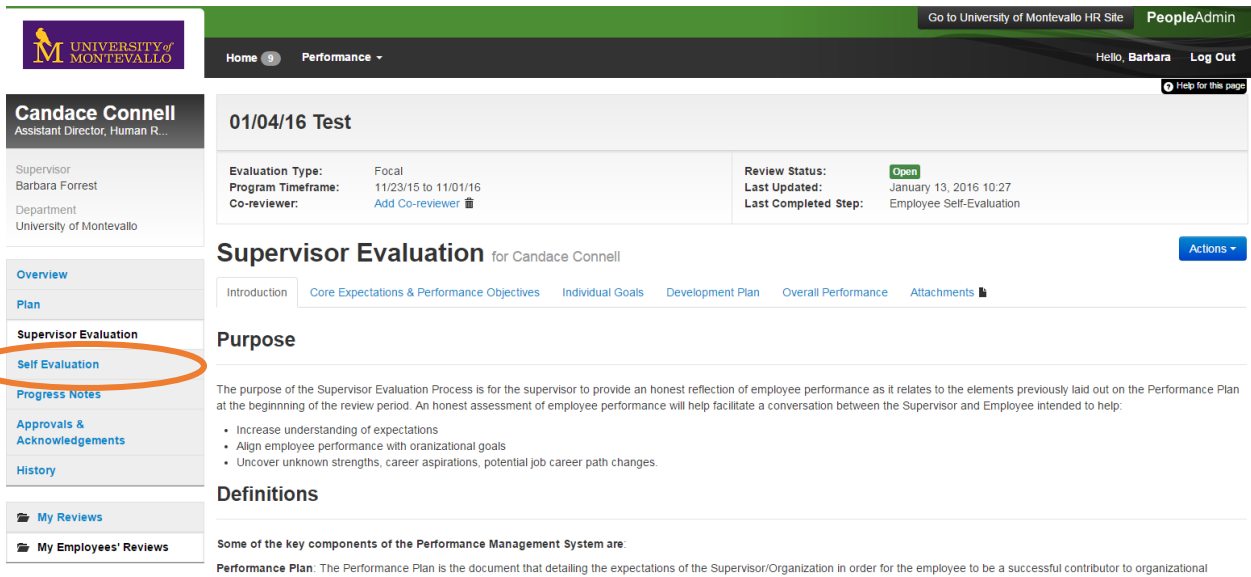
Home 9 Performance ▾ Hello, Barbara Log Out

Welcome to the Employee Portal, Barbara Forrest

Your Action Items

Item	Description	Due Date	Status	Action
01/04/16 Test for Candace Connell	Mid-Year Check-In	n/a	Available	View
01/04/16 Test for Candace Connell	Supervisor Evaluation	n/a	Available	View
01/04/16 Test for Kathleen Bailey	Supervisor Creates Plan	n/a	Available	View

2. The system will open up the Supervisor Evaluation. Click “Self-Evaluation” to review the employee’s own evaluation of his or her performance before proceeding with the Supervisor Evaluation.



Go to University of Montevallo HR Site PeopleAdmin

Home 9 Performance ▾ Hello, Barbara Log Out

Candace Connell
Assistant Director, Human Resources

Supervisor: Barbara Forrest
Department: University of Montevallo

01/04/16 Test

Evaluation Type: Focal
Program Timeframe: 11/23/15 to 11/01/16
Co-reviewer: [Add Co-reviewer](#)

Review Status: **Open**
Last Updated: January 13, 2016 10:27
Last Completed Step: Employee Self-Evaluation

Supervisor Evaluation for Candace Connell

Introduction Core Expectations & Performance Objectives Individual Goals Development Plan Overall Performance Attachments

Purpose

The purpose of the Supervisor Evaluation Process is for the supervisor to provide an honest reflection of employee performance as it relates to the elements previously laid out on the Performance Plan at the beginning of the review period. An honest assessment of employee performance will help facilitate a conversation between the Supervisor and Employee intended to help:

- Increase understanding of expectations
- Align employee performance with organizational goals
- Uncover unknown strengths, career aspirations, potential job career path changes.

Definitions

Some of the key components of the Performance Management System are:

Performance Plan: The Performance Plan is the document that detailing the expectations of the Supervisor/Organization in order for the employee to be a successful contributor to organizational

Overview
Plan
Supervisor Evaluation
[Self Evaluation](#)
Progress Notes
Approvals & Acknowledgements
History

My Reviews
My Employees' Reviews

3. Review the employee’s Self Evaluation. Click “Supervisor Evaluation” to proceed.

UNIVERSITY of MONTEVALLO

Go to University of Montevallo HR Site PeopleAdmin

Home Performance

Hello, Barbara Log Out

Help for this page

Candace Connell
Assistant Director, Human R...

Supervisor
Barbara Forrest
Department
University of Montevallo

01/04/16 Test

Evaluation Type: Focal
Program Timeframe: 11/23/15 to 11/01/16
Co-reviewer: [Add Co-reviewer](#)

Review Status: **Open**
Last Updated: January 13, 2016 10:27
Last Completed Step: Employee Self-Evaluation

Self Evaluation for Candace Connell Actions

Purpose

The purpose of the Self-Evaluation is to have the employee provide an honest reflection of their performance as it relates to the elements previously laid out on the Performance Plan at the beginning of the review period.

An honest self-assessment will help facilitate a conversation between the Supervisor and Employee intended to help:

- Increase understanding of expectations
- Align employee performance with organizational goals
- Uncover unknown strengths, career aspirations, potential job career path changes.

Overview
Plan
Supervisor Evaluation
Self Evaluation
Progress Notes
Approvals & Acknowledgements
History

4. You may review the Purpose and Definitions. Scroll to the bottom of the page and click “Next.”

UNIVERSITY of MONTEVALLO

Go to University of Montevallo HR Site PeopleAdmin

Home Performance

Hello, Barbara Log Out

Help for this page

Candace Connell
Assistant Director, Human R...

Supervisor
Barbara Forrest
Department
University of Montevallo

01/04/16 Test

Evaluation Type: Focal
Program Timeframe: 11/23/15 to 11/01/16
Co-reviewer: [Add Co-reviewer](#)

Review Status: **Open**
Last Updated: January 13, 2016 10:27
Last Completed Step: Employee Self-Evaluation

Supervisor Evaluation for Candace Connell Actions

Introduction **Core Expectations & Performance Objectives** Individual Goals Development Plan Overall Performance Attachments

Purpose

The purpose of the Supervisor Evaluation Process is for the supervisor to provide an honest reflection of employee performance as it relates to the elements previously laid out on the Performance Plan at the beginning of the review period. An honest assessment of employee performance will help facilitate a conversation between the Supervisor and Employee intended to help:

- Increase understanding of expectations
- Align employee performance with organizational goals

Overview
Plan
Supervisor Evaluation
Self Evaluation
Progress Notes
Approvals & Acknowledgements

Definitions

Some of the key components of the Performance Management System are:

Performance Plan: The Performance Plan is the document that detailing the expectations of the Supervisor/Organization in order for the employee to be a successful contributor to organizational objectives. The Plan Form is the tool used to create the Performance Plan and then communicate the plan to the employee. This form is shared between supervisor and employee, with the exception that the supervisor may have the ability to create objectives, while the employee only sees a read only version of the plan.

Acknowledgements: Acknowledgements simply record that an individual received and has had the opportunity to read/understand a specific document. There are three types of Acknowledgements in the Performance Management system. The Employee Acknowledgement of the Performance Plan, the Employee Acknowledgement of the Supervisor Evaluation, and the Reviewing Officer (2nd level supervisor) Acknowledgement of the Supervisor Evaluation.

Self-Evaluation: The Self-Evaluation is the process by which the Employee reflects on their performance in regard to the components communicated through the Performance Plan. The Self-Evaluation Form is used to record the self-assessment and typically looks identical to the **Plan Form** with the addition of a field to record feedback on how the employee perceives they have performed in relation to the stated objective.

Supervisor Evaluation: The Supervisor Evaluation is the process by which the Supervisor provides an assessment of employee performance of the objectives on the Performance Plan. The **Supervisor Evaluation Form** is used to record any feedback and typically includes a formal rating of the objectives set in place on the Performance Plan. The Supervisor Evaluation Form typically looks identical to the Plan form with the addition of formal rating fields along with the opportunity to provide comments.

Progress Notes: Progress Notes are similar to journal entries that can be recorded at any time during the review period. Progress Notes are confidential to the author (i.e. the supervisor cannot see employee notes, and vice-versa).

Save Draft **Next**

5. Carefully review each competency and the employee accordingly (using whole numbers only). Ratings can be entered by clicking on the rating scale or by entering the number in the number box. **Each rating**

of a 1 or 4 requires supporting narrative and documentation. When all competencies are complete click “Next.”

Core Expectations & Performance Objectives

Competency:

PRODUCTIVITY:

Description:

Consider the amount of work the employee produces.

Type

* Rating

1 2 3 4

Comments

Remember - each score of a 1 or 4 must be justified in the narrative and accompanying documentation.

Competency:

WORK QUALITY:

Description:

Consider the accuracy, thoroughness and timeliness of the employee's work.

Type

* Rating

1 2 3 4 1.0

Comments

Save Draft Next >

6. Review the Individual Goals. Complete the assessment and comments for each goal listed. Click “Next” when complete.

Individual Goals

Individual Goal Name:

Implement online performance evaluations

Individual Goal Description:

Develop online evaluations through PeopleAdmin and train all users on the new system.

Goal Type:

Professional

Self-Assessment
Accomplished

Comments

Save Draft Next >

7. Review the Development Plan. Complete the assessment and comments for each activity listed. Click "Next" when complete.

Development Plan

The purpose of recording developmental activities is to formalize and track any activities toward performance improvement, career advancement, training, education, etc. Developmental Activities are NOT rated at the end of the review period, but will be reviewed for progress and future planning.

Development Activity Description:

Attend Birmingham SHRM Legal Update to learn about employment law changes that may affect the University.

Development Activity:

Attend annual employment law update

Target Completion Date:

2016-05-31

Comments

Save Draft Next >

8. Enter required information for Performance Competencies.

Supervisor Evaluation for Candace Connell Actions ▾

[Introduction](#) [Core Expectations & Performance Objectives](#) [Individual Goals](#) [Development Plan](#) [Overall Performance](#) [Attachments](#)

Required fields are indicated with an asterisk (*).

Performance Competencies

* 1. List the employee's strengths that contribute to effective job performance.

* 2. List areas that require improvement for better job performance.

* 3. What is needed to improve the employee's effectiveness in completing assigned job duties (i.e. training, tools/equipment, etc.)?

Remove Entry?

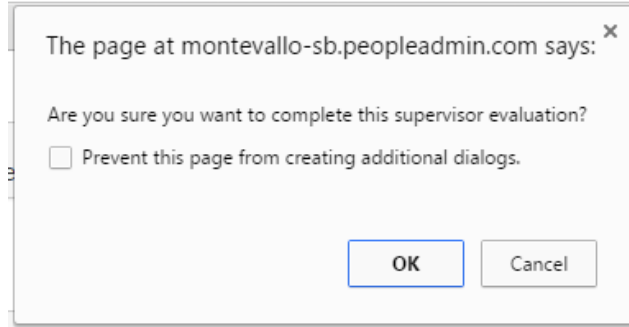
9. The Overall Rating does not calculate on the Supervisor Evaluation until the evaluation has been completed. Enter any comments regarding your overall performance for the year. Click "Complete."

Overall Rating

Comments

Attachments are optional, but remember to attach them before completing the self-evaluation! See "Attaching Supporting Documentation" in this document for more information.

10. A pop-up warning will appear. Click "OK." Please note that you will not be able to make changes to the evaluation after clicking "OK." If you need to make changes and do not wish to proceed, click "Cancel."



11. You will see the message, "The Supervisor Evaluation has been marked as complete."



01/04/16 Test			
Evaluation Type:	Focal	Review Status:	Open
Program Timeframe:	11/23/15 to 11/01/16	Last Updated:	January 13, 2016 11:39
Co-reviewer:	N/A	Last Completed Step:	Supervisor Evaluation

Supervisor Evaluation for Candace Connell

Actions ▾

Purpose

The purpose of the Supervisor Evaluation Process is for the supervisor to provide an honest reflection of employee performance as it relates to the elements previously laid out on the Performance Plan at the beginning of the review period. An honest assessment of employee performance will help facilitate a conversation between the Supervisor and Employee intended to help:

UNIVERSITY of MONTEVALLO

Home Performance ▾

Go to University of Montevallo HR Site PeopleAdmin

Hello, Candace Log Out

The Self Evaluation has been marked as complete.

Candace Connell
Assistant Director, Human R...

Supervisor
Barbara Forrest

Department
University of Montevallo

Overview

01/04/16 Test			
Evaluation Type:	Focal	Review Status:	Open
Program Timeframe:	11/23/15 to 11/01/16	Last Updated:	January 13, 2016 10:27
Co-reviewer:	N/A	Last Completed Step:	Employee Self-Evaluation

STEP 6: REVIEWING OFFICER ACKNOWLEDGES EVALUATION

1. From “Your Action Items” on the Employee Portal, click “Reviewing Officer Acknowledges Evaluation.”

The screenshot shows the 'Performance' section of the PeopleAdmin portal for Mary Heuton. A table titled 'Your Action Items' lists several evaluation tests. The item '01/04/16 Test for Candace Connell' with the description 'Reviewing Officer Acknowledges Evaluation' is circled in orange.

Item	Description	Due Date	Status	Action
01/04/16 Test for Barbara Forrest	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Benjamin Hayes	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Bridgett Teague	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Britney Dickson	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Candace Connell	Reviewing Officer Acknowledges Evaluation	n/a	Available	View

2. Scroll through the page to view the Overall Rating Numerical Score, Purpose, Definitions, Core Expectations & Performance Objectives, Goals, Development Activities, Performance Competencies, Overall Rating, and Attachments. Please note the numerical rating shows at the top of the page and not within the Overall Rating Section.

The screenshot shows the details for the '01/04/16 Test' for Candace Connell. The 'Overall Rating: 3.0' is circled in orange. The page includes a sidebar for Candace Connell, a supervisor information section, and a 'Purpose' section.

01/04/16 Test Overall Rating: 3.0

Supervisor Evaluation for Candace Connell

Purpose

The purpose of the Supervisor Evaluation Process is for the supervisor to provide an honest reflection of employee performance as it relates to the elements previously laid out on the Performance Plan at the beginning of the review period. An honest assessment of employee performance will help facilitate a conversation between the Supervisor and Employee intended to help.

- Increase understanding of expectations
- Align employee performance with organizational goals

3. Enter comment for the supervisor as needed. These comments will NOT be visible to the employee. Click “Return” if the evaluation needs to be sent back to the supervisor for correction. Click “Approve” if the evaluation does not need to be returned for correction.

Overall Rating

Comments

I am pleased with Candace's performance this year.

Attachments

Customer Service Em...

Download

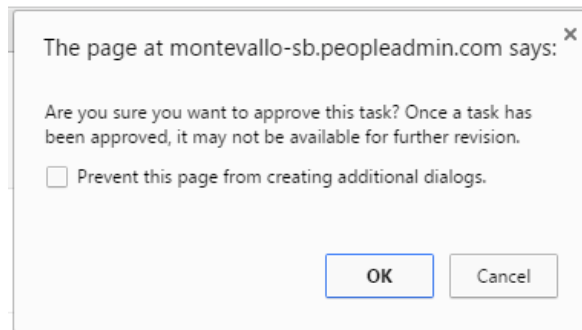
This email demonstrates exemplary customer service.

Comment

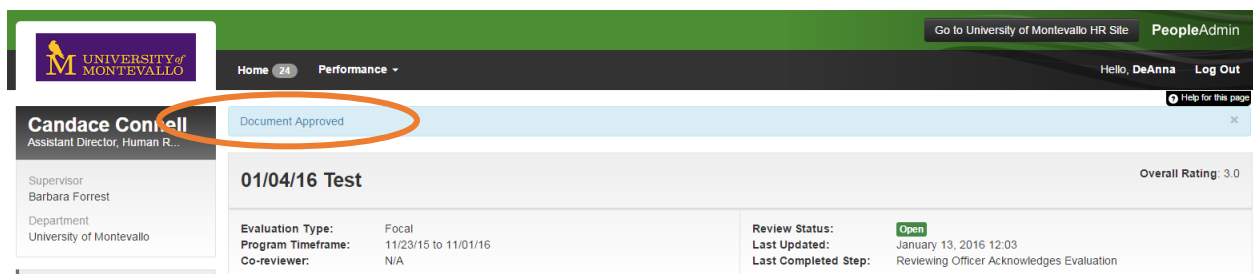
I agree with your assessment, Barb.

Return Approve

4. A pop-up warning will appear. Click "OK."



5. You will receive the message, "Document Approved."



The screenshot shows the PeopleAdmin interface for Candace Connell. A notification banner at the top reads "Document Approved". The main content area displays details for the "01/04/16 Test" evaluation, including the supervisor Barbara Forrest, the program timeframe from 11/23/15 to 11/01/16, and the overall rating of 3.0. The evaluation type is Focal, and the review status is Open, last updated on January 13, 2016 at 12:03. The last completed step is "Reviewing Officer Acknowledges Evaluation".

STEP 7: EVALUATION REVIEW MEETING

1. From “Your Action Items” on the Employee Portal, click “Reviewing Officer Acknowledges Evaluation.”

Help for this page

Welcome to the Employee Portal, Barbara Forrest

Your Action Items

Search:

Item	Description	Due Date	Status	Action
01/04/16 Test for Candace Connell	Mid-Year Check-In	n/a	Available	View
01/04/16 Test for Candace Connell	Evaluation Review Meeting	n/a	Available	View

2. The purpose of this step is to document that you met with your employee to review the Supervisor Evaluation; there is no information to enter. Click “Complete.”

Help for this page

01/04/16 Test

Overall Rating: 3.0

Evaluation Type: Focal	Review Status: Open
Program Timeframe: 11/23/15 to 11/01/16	Last Updated: January 13, 2016 12:03
Co-reviewer: N/A	Last Completed Step: Reviewing Officer Acknowledges Evaluation

Evaluation Review Meeting

[Complete](#)

If dispute do press complete! Supervisor and employee must communicate offline.

STEP 8: EMPLOYEE ACKNOWLEDGES EVALUATION

1. From “Your Action Items” on the Employee Portal, click “Employee Acknowledges Evaluation.”

Welcome to the Employee Portal, Candace Connell

Your Action Items

Search: <input type="text"/>				
Item	Description	Due Date	Status	Action
01/04/16 Test for Candace Connell	Employee Acknowledges Evaluation	n/a	Available	View

Showing 1 to 1 of 1 entries

2. Review the completed Supervisor Evaluation. Your supervisor should have gone over the evaluation items during your review meeting. Enter any final comments regarding your evaluation (comments are optional). Click “Acknowledge.”

Comment

[Acknowledge](#)

TIP 1: ATTACHING SUPPORTING DOCUMENTATION

1. From the Self Evaluation or Supervisor Evaluation, click “Attachments.” Enter the information for your file, choose the file location and click “Upload File.”

The screenshot shows the PeopleAdmin interface for Candace Connell. The main content area is titled "01/04/16 Test" and includes details about the evaluation type, program timeframe, and review status. Below this, the "Attachments" section is active, showing a form with fields for Name, Description, and File. The "Upload file" button is circled in orange. A "New Attachment" button is also visible in the top right of the form area.

2. You will see that the file was uploaded. To add an additional attachment, click “New Attachment.” To delete a file, click the delete icon.

Attachments

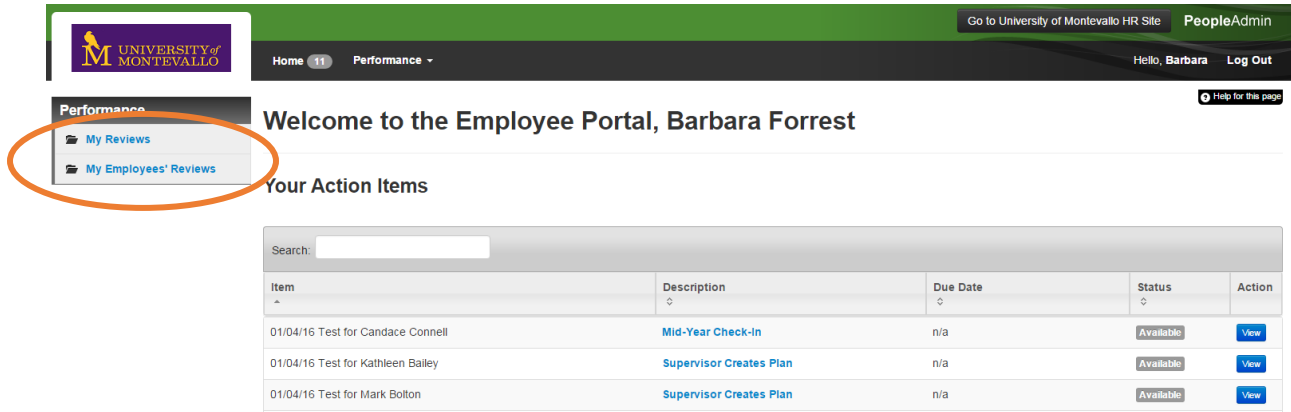
The screenshot shows the Attachments table with one entry. The "New Attachment" button is circled in orange. The delete icon for the existing attachment is also circled in orange.

Name	Description	File Type	Size	Delete
Customer Service Email	This email demonstrates exemplary customer service.	application/pdf	4.97 MB	

TIP 2: PROGRESS NOTES

Progress Notes are a great way to keep track of performance throughout the year so that you don't forget important items when it comes time to write your Self Evaluation or Supervisor Evaluation.

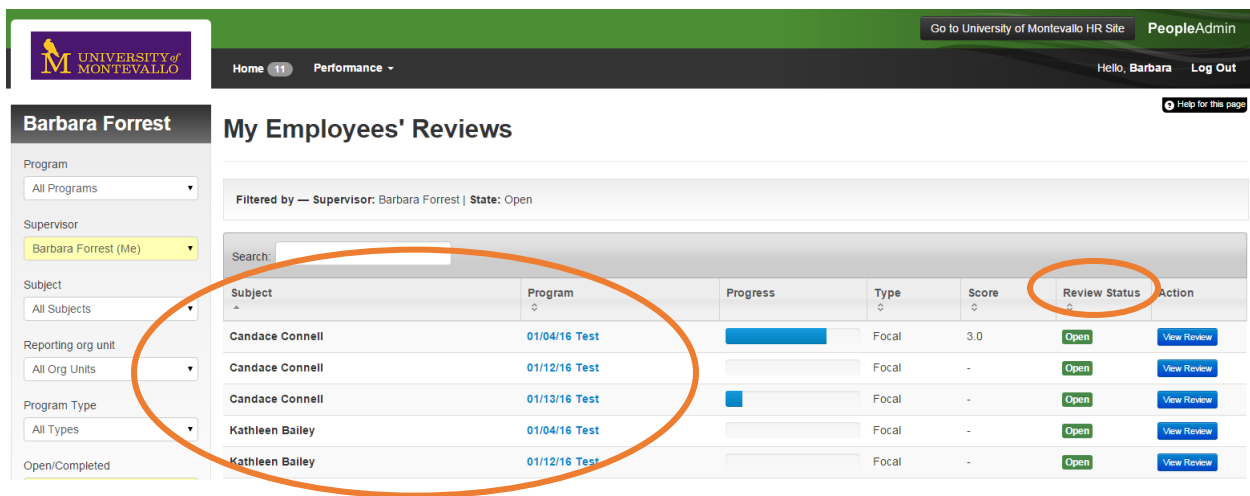
1. From the Employee Portal click on "My Reviews" to add notes about your own performance; click "My Employee's Reviews" to add notes about an employee's performance.



The screenshot shows the 'Performance' section of the Employee Portal. The user is Barbara Forrest. The left sidebar contains a 'Performance' menu with two items: 'My Reviews' and 'My Employees' Reviews', both of which are circled in orange. The main content area displays a 'Welcome to the Employee Portal, Barbara Forrest' message and a 'Your Action Items' table.

Item	Description	Due Date	Status	Action
01/04/16 Test for Candace Connell	Mid-Year Check-in	n/a	Available	View
01/04/16 Test for Kathleen Bailey	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Mark Bolton	Supervisor Creates Plan	n/a	Available	View

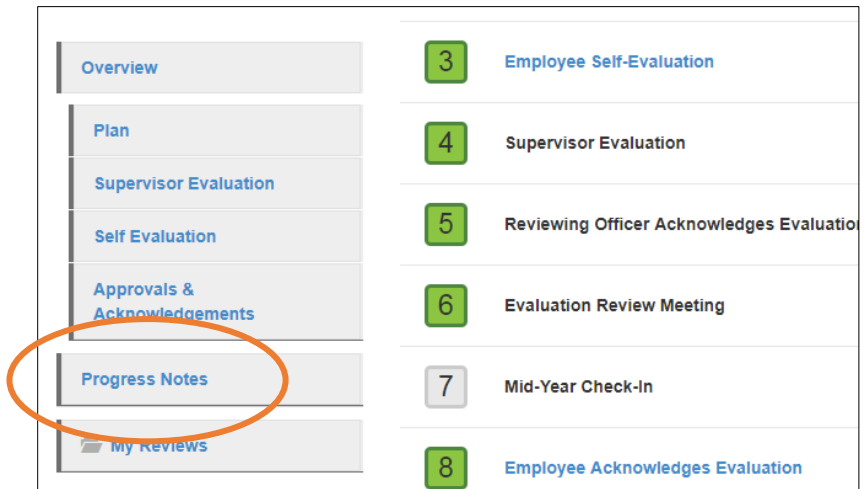
2. Select the review period for which you want to enter Progress Notes. You may only enter Progress Notes for a review cycle that has an open review status.



The screenshot shows the 'My Employees' Reviews' page for Barbara Forrest. The page is filtered by Supervisor: Barbara Forrest and State: Open. The table below shows a list of reviews for Candace Connell and Kathleen Bailey. The 'Review Status' column is circled in orange, and the entire table area is also circled in orange.

Subject	Program	Progress	Type	Score	Review Status	Action
Candace Connell	01/04/16 Test	<div style="width: 100%;"></div>	Focal	3.0	Open	View Review
Candace Connell	01/12/16 Test	<div style="width: 0%;"></div>	Focal	-	Open	View Review
Candace Connell	01/13/16 Test	<div style="width: 25%;"></div>	Focal	-	Open	View Review
Kathleen Bailey	01/04/16 Test	<div style="width: 0%;"></div>	Focal	-	Open	View Review
Kathleen Bailey	01/12/16 Test	<div style="width: 0%;"></div>	Focal	-	Open	View Review

3. Click on the “Progress Notes” box.



4. Enter the details for your note and upload attachments as needed. Click Save.

Progress Notes [New Progress Note](#)

Title (Optional)

Note

[Add attachment](#)

[Save](#)

5. Now, you can view the note that was entered. To delete the note, hover your mouse over the note and a delete button will appear. Click “Delete.” To add another note, click “New Progress Note.”

Progress Notes [New Progress Note](#)

Tardiness January 13, 2016 16:06 [Delete](#)

Candace was late for work three days this week.

TIP 3: VIEWING POSITION DESCRIPTIONS IN THE PERFORMANCE MODULE

1. From the Performance Review Menu, click on the title under the employee's name.

Vanessa Cottingham

Supervisor: Barbara Forrest
Position Description: Senior Human Resources Generalist
Department: University of Montevallo

Overview
Plan
Supervisor Evaluation

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Barbara Forrest Supervisor		2018-01-14	
2 Employee Acknowledges Plan	Vanessa Cottingham		2018-01-14	
3 Employee Self-Evaluation	Vanessa Cottingham	2018-01-08	2018-01-14	2018-04-10
4 Supervisor Evaluation	Barbara Forrest Supervisor		2018-01-14	2018-04-10
	Mary Barton			

2. A new tab will open in your browser with the position description.

Position Descriptions / Staff / Assistant Director, Human Resources

Position Description: Assistant Director, Human Resources (Staff)
Current Status: Active
Position Type: Staff
Department: Human Resources and Risk Management, Title IX, and EO/AA Department (Human Resources and Risk Management, Title IX, and EO/AA Department)

Print Preview (Employee View)
Print Preview
View Supervisor
Modify Position Description
Employee PD Certification Action

Summary History

Employee Details

Seated User

Details

First Name	Candace
Last Name	Connell
Work Email	emailaddress@zed.zed

Position Details

3. If you have Hiring Manager privileges in PeopleAdmin and are viewing the system in that role, you can click "Modify the Position Description" if you believe the description should be updated. The will allow you to make changes to the description and submit them through the position description workflow. Contact Human Resources at 6055 for more guidance on this process.

Position Descriptions / Staff / Assistant Director, Human Resources



Position Description: Assistant Director, Human Resources (Staff)

Current Status: Active

Position Type: Staff
Department: Human Resources and Risk Management, Title IX, and EO/AA Department (Human Resources and Risk Management, Title IX, and EO/AA Department)

Print Preview (Employee View)

Print Preview

Favorite

Modify Position Description

Employee PD Certification Action

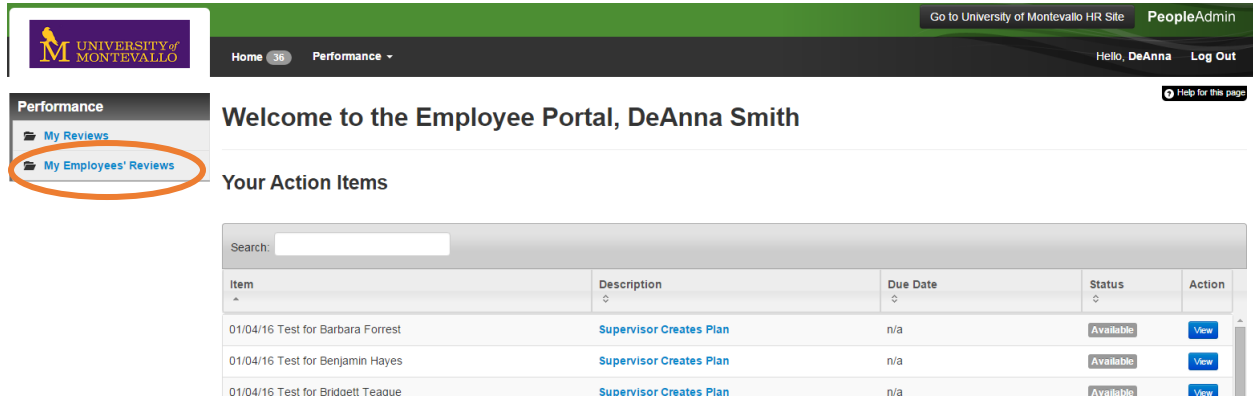
Summary | History

Employee Details

Seated User

TIP 4: MANAGING YOUR EMPLOYEES' EVALUATIONS

1. From the Employee Portal, click on “My Employees’ Reviews.”

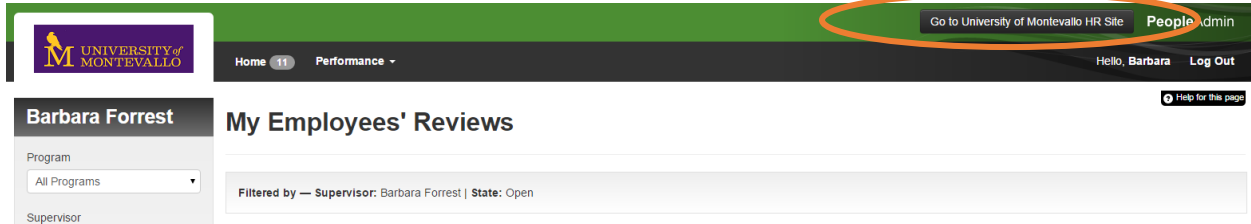


The screenshot shows the University of Montevallo PeopleAdmin Performance portal. The left sidebar has a 'Performance' section with two links: 'My Reviews' and 'My Employees' Reviews', the latter of which is circled in orange. The main content area displays a welcome message for DeAnna Smith and a section titled 'Your Action Items'. Below this is a search bar and a table with the following data:

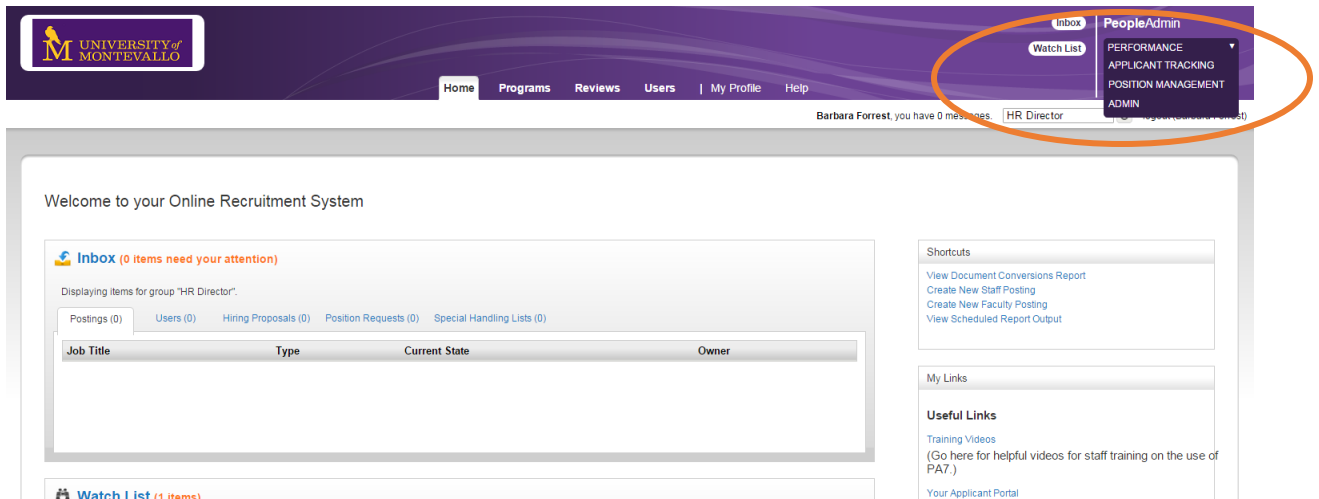
Item	Description	Due Date	Status	Action
01/04/16 Test for Barbara Forrest	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Benjamin Hayes	Supervisor Creates Plan	n/a	Available	View
01/04/16 Test for Bridgett Teague	Supervisor Creates Plan	n/a	Available	View

TIP 5: NAVIGATING TO PEOPLEADMIN FROM THE EMPLOYEE PORTAL

1. From the Employee Portal, click “Go to University of Montevallo HR Site.”



2. Navigate to the module you need to use next (Applicant Tracking or Position Management)



TIP 6: PERFORMANCE DASHBOARD

Performance dashboards allow admins to easily assess the status of programs and individual reviews.

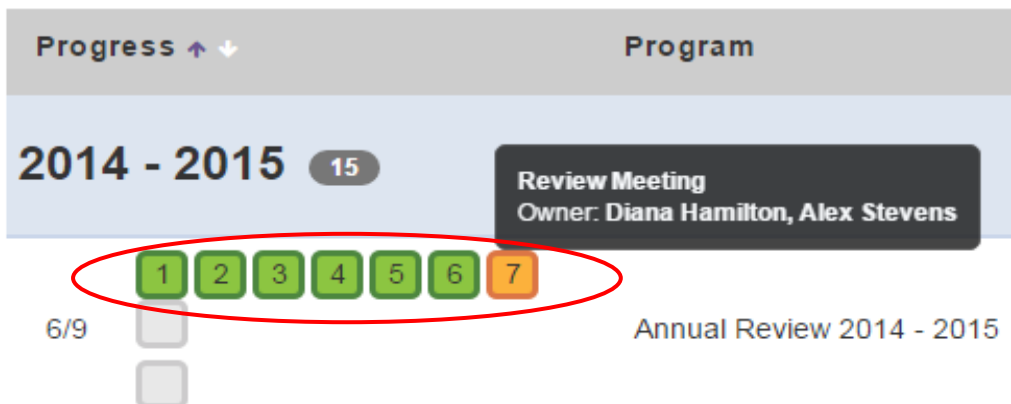
All reviews are automatically sorted within a tabbed interface; with a click, you can view all new, in-process, or completed reviews, as well as reviews with overdue or disputed steps.



Click **Advanced** to filter your search by program organizational unit, employee reporting organizational unit, program status, or supervisor.

The screenshot shows the "Advanced" search filter interface. It includes a "Reset" button, a "Filter" dropdown set to "Programs", an "Employee Name" search field, and a "Group" dropdown set to "Group By". A red circle highlights the "Advanced" button. Below these are four filter sections: "Program Org Unit" (All), "Reporting Org Unit" (All), "Program Status" (active), and "Supervisor" (Alex Stevens). At the bottom, a summary bar shows: All Employees (2), Not Started (0), In Process (2), Complete (0), Overdue (0), and Disputed (0).

Get at-a-glance info on a specific review by hovering over the numbered steps to reveal the step label and owner's name. Search results are sortable by employee name, anniversary date, review progress, program name, and overall score. Search results can also be grouped by program, anniversary date, and reporting organizational unit.




Review Dashboard

When you click on an individual review, the progress of the review is displayed in dashboard form on the **Overview** tab. **Completed tasks are marked with green boxes; in-progress tasks are marked with orange boxes.** Upcoming tasks are marked with a gray box.

The **Task Owner** tab will list the names of the owner, as well as their role in each step of the review process.

	Overview	Steps	Plan	Evaluations	Acknowledgements	HR Notes
	Task	Task Owner	Date Opened	Date Completed	Due Date	
1	Creates Objective Plan and Review Meeting	Kermit Randa Supervisor		03/08/2015		
2	Employee Acknowledgement of Plan	Tod Klubnik Subject				
3	Mid-Year Check-In	Kermit Randa Supervisor		03/08/2015		
4	Supervisor Evaluation	Kermit Randa Supervisor				
5	Reviewing Officer Evaluation Approval	Kermit Randa Reviewing Officer				
6	Review Meeting	Kermit Randa Supervisor				
7	Employee Acknowledgement of Review	Tod Klubnik Subject				
8	Self Evaluation	Tod Klubnik Subject				

Dashboard Key

 Task Not Started / Unavailable Task Completed Task Open Task Disputed