



Staff Employee Guide:

WesternU Annual Performance Evaluation Using PeopleAdmin

Last update: 3/17/2025

Overview of the Process

1. Your supervisor reviews your goals from last year and creates the plan for the 2024-2025 year.
 2. You meet with your supervisor to look at last year's goals and the **plan for this year's Performance Evaluation**.
 3. You respond to the goals for next year that you planned with your supervisor. Log in and you will simply **Acknowledge** the goals.
 - 4, 5, & 6 can happen at the same time.
 4. Do a **self-evaluation** of your performance.
 5. Your supervisor evaluates your job performance.
 6. You may have a 2nd supervisor or client whom your supervisor needs to ask about your performance to complete the evaluation. If so, your supervisor can request feedback from that person.
 7. You **meet with your supervisor** to discuss your performance evaluation.
 8. You **acknowledge** that you have met with your supervisor.
- This is an acknowledgement, and not a statement that you agreed with everything. You may make additional comments in the form about the evaluation as well.

PeopleAdmin Step

Set Goals

- 1 Supervisor Creates the Plan
- 2 Supervisor/Employee Goal/Plan Review Meeting
- 3 Employee Acknowledges the Plan

Evaluate Performance

- 4 Employee Completes Self Evaluation
- 5 Supervisor Evaluation
- 6 Multi Rater Feedback
- 7 Supervisor/Employee Evaluation Meeting
- 8 Employee Acknowledges Evaluation

Questions?

<https://westernu.sharepoint.com/sites/2024perf>

Email: PerformanceReviews@westernu.edu

Reference Guide for Employees: Performance Self-Evaluation Using People Admin

Contents:

- A. Instructions: Summary
- B. Instructions: Details with Screen Shots and Where to Click

A. Instructions: Summary

1. Begins at PeopleAdmin Step **3** - that is, after you have met with your supervisor.
2. Click on the link and **log in** to the Employee Portal to access your evaluation form.
3. Click on **My Reviews**. Then click on your name to go to the next step.
4. Your next "Action Item" is to read and **Acknowledge the Plan**. Click on the link.
5. Review the Plan (Should be what was reviewed with you during the meeting).
6. In most cases you will now click **Agree and Acknowledge**, as you have already met with your supervisor about them.
7. Next, work on your self-evaluation – PeopleAdmin step **4**. Start with the **Performance Factors**.
8. Click on the **Essential Job Duties and Responsibilities** tab.
9. Click on the **Goals** tab to evaluate your goals from the prior year. Write comments.
10. Near the bottom of the page, answer the questions about your **Career Objectives** and at least one **Proposed Goal** for the next year.
11. After you meet with your supervisor about the evaluation and plans for next year -- PeopleAdmin step **7** -- you will receive a notice from PeopleAdmin to **Acknowledge the Evaluation**. **8**
12. When you are done with this section, select **Complete** at the top or bottom of the screen.
After you Acknowledge, the evaluation is done.

B. Instructions: Details with Screen Shots and Where to Click

1. Begin at PeopleAdmin Step **3** - that is, after you have met with your supervisor.

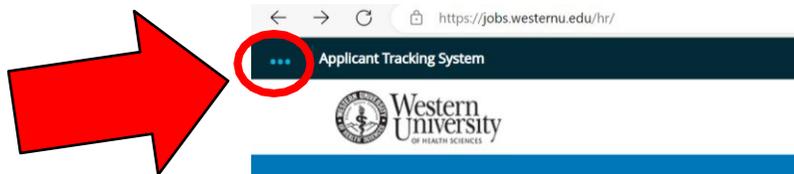
- You receive an email from **PerformanceReviews@westernu.edu**. The email has a link to PeopleAdmin, reading [View your Action item in the Employee Portal »](#)
- **Important:** You must be at **Step 3** before PeopleAdmin will email you the link. If you do not receive it, make sure that your supervisor has marked the Goal/Plan meeting as Complete in the PeopleAdmin system, so that you will be at **Step 3**.

2. Click on the link and **log in** to the Employee Portal to access your evaluation form.

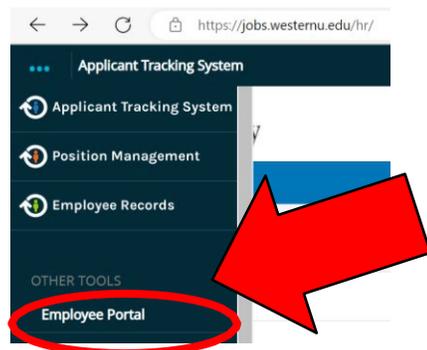
Troubleshooting: "I don't have the email with the link!"

If the email is not in your "Focused" folder in Outlook, look in your "Other" folder. You can also access your evaluation by going to <https://jobs.westernu.edu/hr/>.

Then click on the 3 dots on the **top left** of the screen.



Then click on **Employee Portal** on the upper left side of the screen.



3. Click on **My Reviews**. Then click on your name to go to the next step.

4. Your next “Action Item” is to read and **Acknowledge the Plan**. Click on the link.

| Item | Description | Due Date | Status |
|-------------------------------|--------------------------------|----------|-----------|
| 2023 Evaluation for Your Name | Employee Acknowledges the Plan | n/a | Available |

5. Next, work on your self-evaluation – PeopleAdmin step **4**. Start with the **Performance Factors**.

- No numerical ratings are required
- Comments are optional
- Click **Save & Continue** when done

Department: 0001-FK Organization

Performance Factors Essential Job Duties and Responsibilities Goals Attachments 0

[Performance Factors Guide](#) [Check spelling](#)

Performance Factors

Please complete your self evaluation by adding comments as it relates to your accomplishments in each factor.
Provide specific examples of excellent or outstanding performance and enter the appropriate narrative to provide details.
Select "Save Draft" and then attach support documents, if desired.
Select "Complete" to send the finalized Self Assessment to your supervisor.

Factor:

JOB KNOWLEDGE: The understanding of the complete scope and related functions of the job. Knowledge of one's specialized and technical field of work.

Comments

6. Click on the **Essential Job Duties and Responsibilities** tab.

- No numerical ratings are required
- Comments are optional
- Click **Save & Continue** when done

Department: 0001-FK Organization

Performance Factors Essential Job Duties and Responsibilities Goals Attachments 0

Required fields are indicated with an asterisk (*). [Check spelling](#)

Overview

Plan

Supervisor Evaluation

Self Evaluation

Approvals & Acknowledgements

Progress Notes

My Reviews

Job Duties

Please complete your self-evaluation by adding comments as it relates to your accomplishments in each job duty & responsibility.

Provide specific examples of excellent or outstanding performance and enter the appropriate narrative to provide details.

Select "Save Draft" and then attach support documents, if desired.

Select "Complete" to send the finalized Self-Evaluation to your supervisor.

Job Duty:

- Researches external sources and analyzes internal data to formulate, plan and implement successful student support programs and services; collaborates with faculty and staff to design and produce special events contributing to student success
- Advises prospective and current students regarding academic programs, student support services and transfer information; provides career information to small groups, prospective and current students; utilizes career interest assessments to include but not limited to Strong Interest Inventory and AZ CIS

Comments

7. Click on the **Goals** tab to evaluate your goals from the prior year. Write comments.

- Comments are **required**
- Click **Save & Continue** when done

Department: 0001-FK Organization

Performance Factors Essential Job Duties and Responsibilities Goals Attachments 0

Required fields are indicated with an asterisk (*). [Check spelling](#)

Overview

Plan

Supervisor Evaluation

Self Evaluation

Approvals & Acknowledgements

Progress Notes

My Reviews

Goals

Please complete your self-evaluation by adding comments as it relates to your accomplishments in each area.

Provide specific examples of excellent or outstanding performance and enter the appropriate narrative to provide details.

Select "Save Draft" and then attach support documents, if desired.

You must propose at least 1 professional goal for the coming year.

Select "Complete" to send the finalized Self-Evaluation to your supervisor.

Goal Name:

8. Near the bottom of the page, answer the questions about your **Career Objectives** and at least one **Proposed Goal** for the next year.

- These questions appear in the Goals tab

Employee Feedback

* What are your future career objectives in 1-3 years ?

If you are interested in pursuing a particular position or role at WesternU within the next 3-5 years, please indicate here.

Proposed Goals

* List your proposed development goals

(Provide at least 1 proposed goal).

Performance Criteria

Remove Entry?

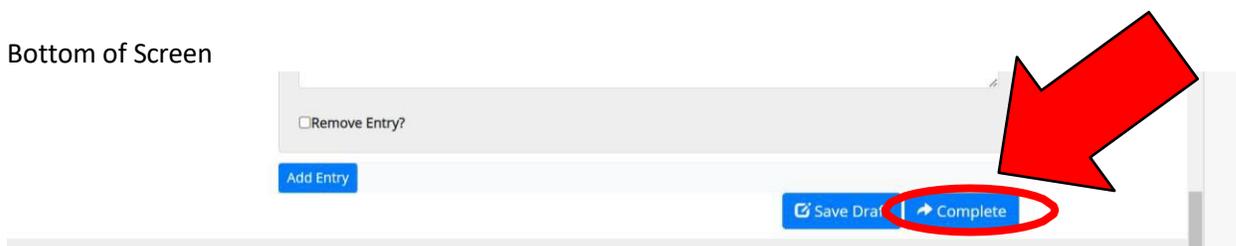
- Optional: At the end of the form there is an option to provide suggestions for improvement to the performance evaluation process.

9. When you are done with this section, select **Complete** at the top or bottom of the screen.

Top of Screen

The screenshot shows the top of the Western University Performance Evaluation form. The browser address bar displays the URL: https://jobs.westernu.edu/portal/performance/reviews/6510/evaluations/13268?selected_tab=%23tab-38192. The page header includes the Western University logo, navigation links (Home, Performance, Progress Notes), and user information (Hello, My Account, Log Out). The main content area shows the 'Goals' tab selected, with a 'Performance Factors' section. A red arrow points to the 'Complete' button in the 'Actions' dropdown menu, which is circled in red. Other buttons in the dropdown include 'Print', 'Save Draft', and 'Program Timeframe'.

Bottom of Screen



- **Important:** When you click **Complete**, the Goal your self-evaluation is final and you will not be able to make future changes.

10. After you meet with your supervisor about the evaluation and plans for next year -- PeopleAdmin step **7** -- you will receive a notice from PeopleAdmin to **Acknowledge the Evaluation.** **8**

- This is an acknowledgement, and not a statement that you agreed with everything.
- You also have the option to Disagree & Acknowledge if you choose.

- You may also make additional comments in the form, in the Progress Notes section (see below) or in the Comments section at the bottom of the form.

Congratulations, you have finished the performance evaluation process.

Questions? PerformanceReviews@westernu.edu

OPTIONAL: Progress Notes. This is an electronic record that can help you track your accomplishments and activities

- The **Progress Notes** link is on the top of the menu bar.

The screenshot shows a dark navigation bar with three items: 'Home' with a notification icon, 'Performance', and 'Progress Notes' which is highlighted with a red box. To the right of the navigation bar, it says 'Hello, Melissa'. Below the navigation bar, the main content area has a heading 'Welcome to the Employee Portal, Melissa Fierro'. Underneath is a section titled 'Your Action Items' with a search input field containing the text 'Start typing to search'. Below the search field is a table with the following data:

| Item | Description | Due Date |
|---|--------------------------------|----------|
| Introductory Non-Exempt (04/01/2018 to 06/30/2018) for Melissa Fierro | Employee Acknowledges the Plan | n/a |

Below the table, it says 'Showing 1 to 1 of 1 entries'.