

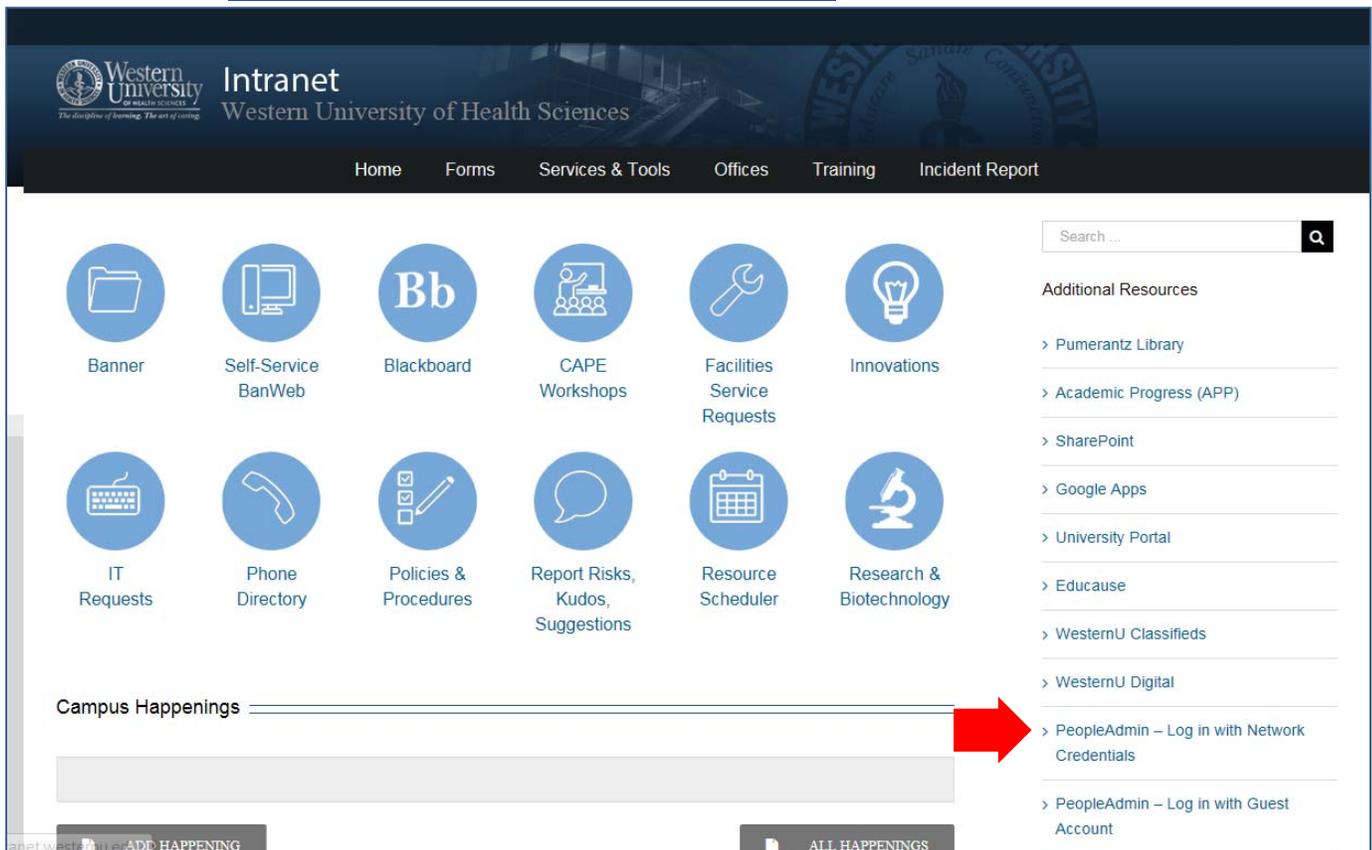
Supervisor's Quick Guide to the Evaluation Process

Part I: Accessing the PeopleAdmin system:

Step 1. Log in to the **WesternU PeopleAdmin** system using a) emailed link; b) intranet or c) off-site login.

- a) **Email** from PerformanceReviews@westernu.edu.
(Don't see it? Check Outlook folder labeled "Other").
- b) **Intranet Log in** at: <https://intranet.westernu.edu/>

Click on the **PeopleAdmin-Log In with Network Credentials** link on the right column:



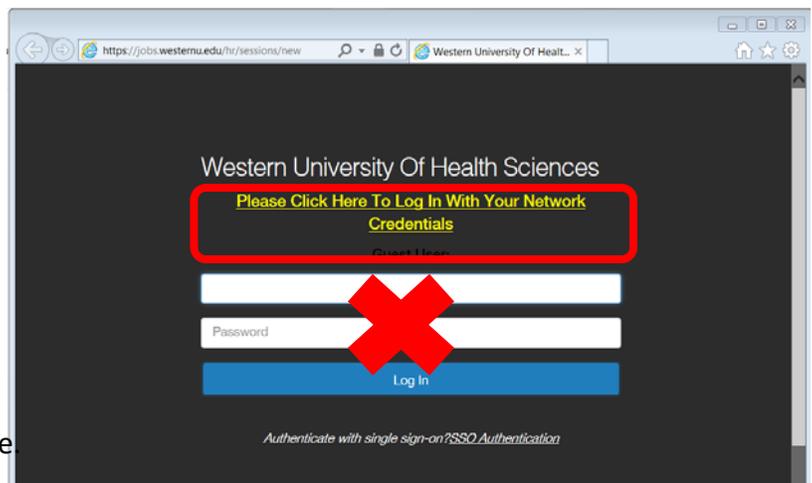
Click on the yellow text link:
Please Click Here to Log In With your Network Credentials

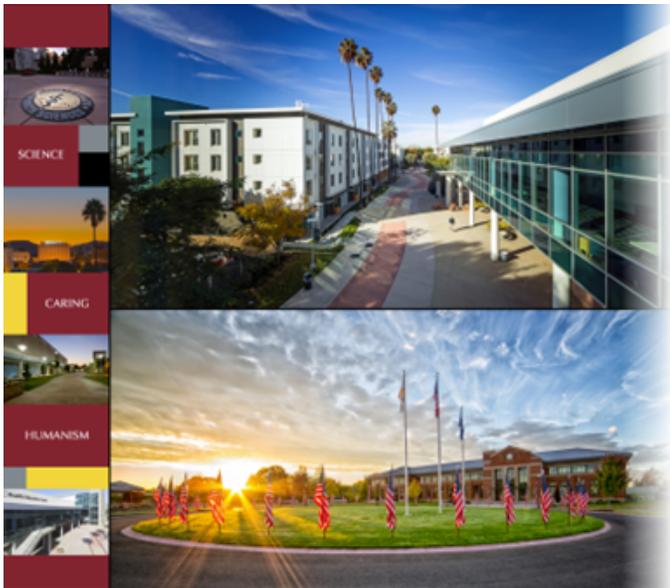
NOTE: do NOT use the white fields shown in the window to log in.

(c) **Off-site Log in** at

<https://jobs.westernu.edu/hr>

Click on the yellow text link as above





Sign in with your organizational account

[Sign in](#)

[Acquire Multi-Factor Authentication](#)

Please remember to sign in using your fully qualified account name (example: someone@westernu.edu).

[Can't access your account? Forgot password?](#)

[Employee Device Enrollment](#)

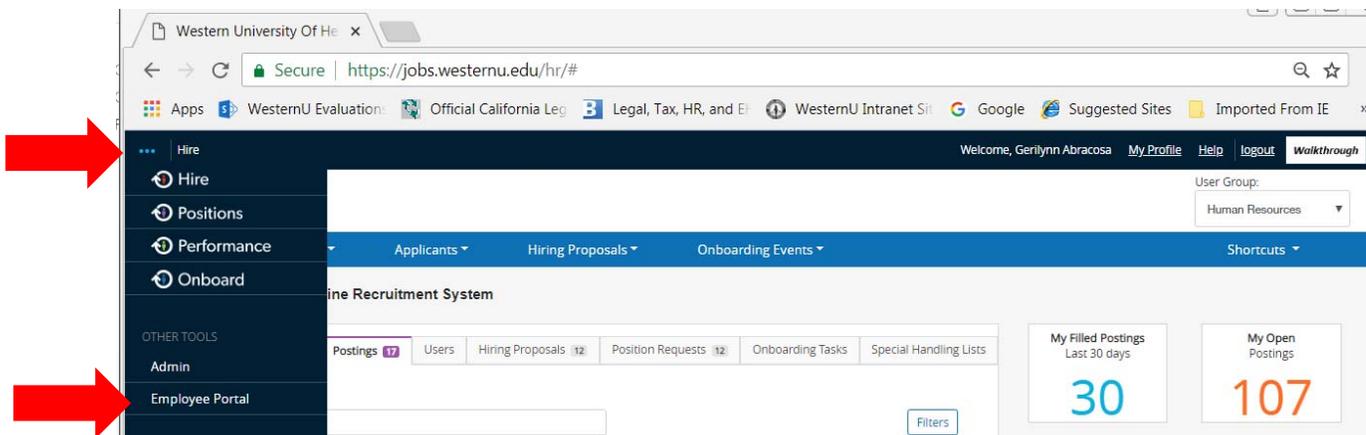
[Android](#) | [iOS](#) | [Windows](#)

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Enter your system Username and Password.

Click the **LOGIN** button.

Step 2. (a) Click on the **three-dots** at the top of the menu bar to see the drop-down menu. (b) From the drop-down menu, click on the **Employee Portal** link.



Part II: The Performance Evaluation Process:

Basic Steps for the Performance Evaluation Process:

1. Supervisor Creates the Plan
2. Supervisor/Employee Goal/Plan Review Meeting - **Offline**
3. Employee Acknowledges the Plan
4. 6 Month Progress Check-In - **Offline, Optional but Recommended**
5. Multi Rater Feedback - **Optional**
6. Employee Completes Self Evaluation
7. Supervisor Evaluation
8. Supervisor/Employee Evaluation Meeting
9. Reviewing Officer Evaluation Review - **Offline, Optional**
10. Employee Acknowledges Evaluation

*Steps 5 through 9 can take place simultaneously.
The other steps happen in order.*

Step 1. Once in the employee portal you will see **Your Action Items** screen as seen below. Start the process by selecting the **Item (e.g. Exempt Annual Review 2022-2023 for -----)**.

The screenshot shows the Western University Employee Portal. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes'. The main content area is titled 'Your Action Items' and contains a search bar and a table with the following data:

Item	Description	Due Date	Status
Exempt Annual Review 2019 for	Supervisor Creates the Plan	n/a	Available
Non-Exempt Annual Review 2019	Supervisor Creates the Plan	n/a	Available

A red arrow points to the first item in the table. The page also shows 'Showing 1 to 2 of 2 entries'.

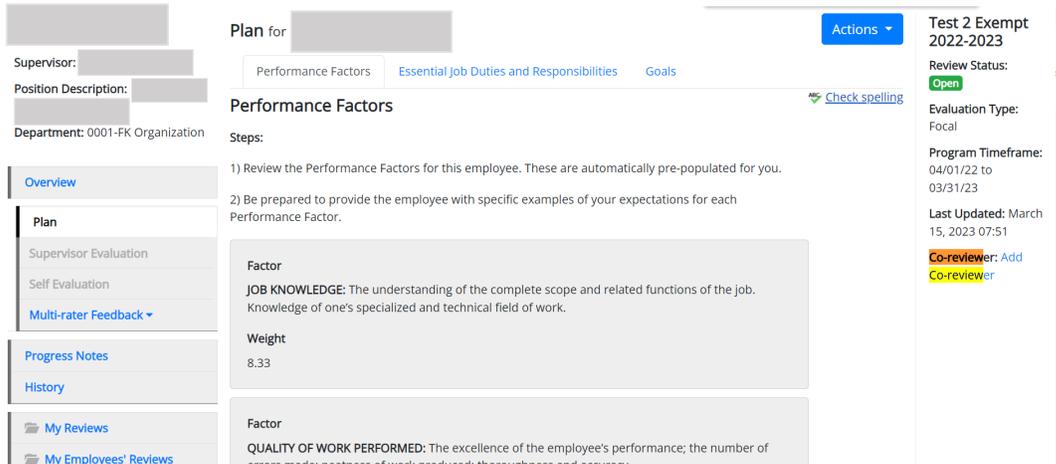
Note: Anytime you are in PeopleAdmin and you don't see **Your Action Items** screen, click on the **Home** tab on the menu bar.

This screenshot is identical to the one above, but with a red arrow pointing to the 'Home' tab in the top navigation bar, illustrating the instruction to click 'Home' if the 'Your Action Items' screen is not visible.

Step 2. Complete all the Tabs:

- 1) **Performance Factors** – no action required – factors are preset.
- 2) **Essential Job Duties and Responsibilities** - pulls in from the employee position – **must add job duty weight.**
- 3) **Goals** –**Must add a minimum of 2 goals.** (If you completed last year and uploaded to Sharepoint can be found at: <https://westernu.sharepoint.com/sites/hrreviews/Lists/2022PerformanceReview/AllItems.aspx>)

Once you have all the employees' goals in the plan - **Click Complete** (or **Save Draft** if you still need to work on it).



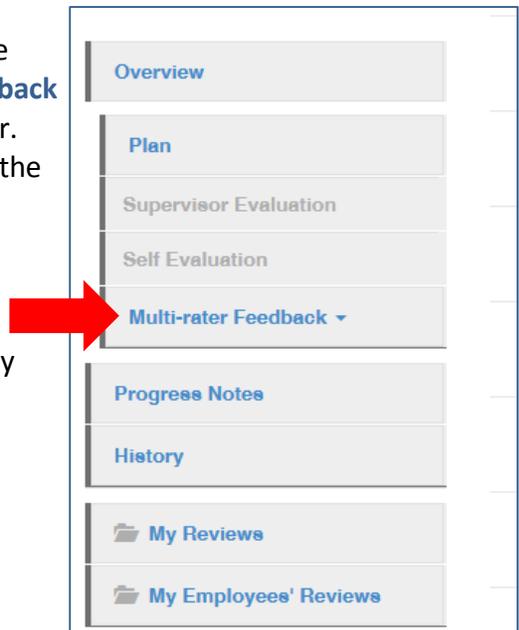
Step 3- Supervisor/Employee Goal/Plan Review Meeting – Schedule this outside the system – log in and click the **Complete** button.

Step 4- (Optional) – It is recommended to have a **6 Month Progress Check In.** However there will be no reminder. If you have the meeting, schedule outside the system.

Step 5 (Optional) – You can request other individuals who are in the PeopleAdmin system to provide you with feedback about your employee by using the **Multi-rater Feedback** option. Click on the **Multi-rater Feedback** link on the left column of the page and enter the name of the Multi-rater. Can add as many Multi-raters as you like. Send out a separate e-mail to the Multi-rater to inform them of your due date to receive their comments.

The Multi-rater will be able to provide comments on the Performance Factors and a general overall comment. The Multi-rater cannot make any changes to your evaluation.

The Multi-rater will not provide numerical ratings.



Step 6 – Your employee will receive an e-mail when it is time to complete their Self-Evaluation.

Step 7 - You will receive an email when it is time to conduct the **Supervisor Evaluation** of the employee -Click on the **Employee Portal** link (See Log in – Step 2).

Once in the employee portal you will see **Your Action Items** screen as shown on Step 1, above. Start the process by selecting the Action **Item** on your respective employees.

You will now enter comments and rate the employee by completing all the following:

Performance Factors – **comments required for ratings of 1 or 2 (lower) or 5 (highest).**

Essential Job Duties and Responsibilities – **comments optional.**

Current Goals – **comment required.**

Plan to Enhance Performance – add information to this area if necessary

Future Goal Planning – Add a minimum of 2 goals for the next review period

When you have completed your evaluation of the employee, click **Complete**.

Step 8 - Schedule Employee/Supervisor Review Meeting– this is a manual step – Please schedule a meeting with your employee to discuss the employee’s evaluation. Once you have completed this task, go to **Step 9** before marking the task **Complete**. Once you mark the task complete the evaluation will be sent to the employee to acknowledge the evaluation.

Step 9 - Reviewing Officer (Supervisor’s Supervisor) - This is **optional** this year, and a manual step. However, if your supervisor would like to review, you must print (paper copy or to PDF) and provide for review. Once your supervisor approves, click **Complete** to sent to the next step.

Step 10 – Employee Acknowledges Evaluation: The final step belongs to the Employee; the employee must acknowledge their review. Acknowledgement means the review has been conducted, not that the employee agrees with everything the supervisor has said in the review.

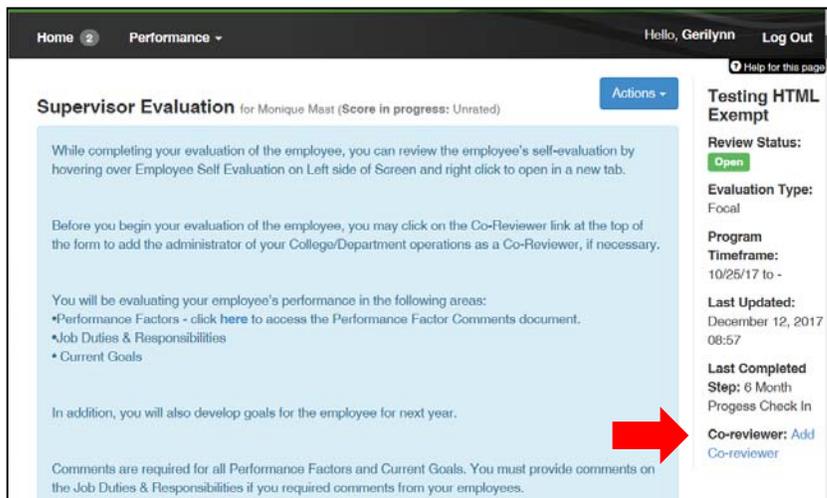
You have now finished the requirements for the Performance Evaluation Program.

Part III. Additional Information:

Co-Reviewer: A Co-Reviewer has the same privileges and access as the Supervisor. The Co-reviewer can be added to the **Plan** document and/or the **Supervisor Evaluation** form. Please check with your Director of Operations or Executive Officer if you need to add your PeopleAdmin administrator or Director of Operations as a Co-Reviewer. ***There can only be 1 Co-Reviewer.***

The Co-Reviewer can override your entries and ratings and/or delete/add to your comments. They can also complete processing the evaluation itself without your approval.

The Co-Reviewer link is on the right side of the screen.



Progress Notes: Progress Notes can be entered any time. The **Progress Notes** link is on the left column of the screen.

