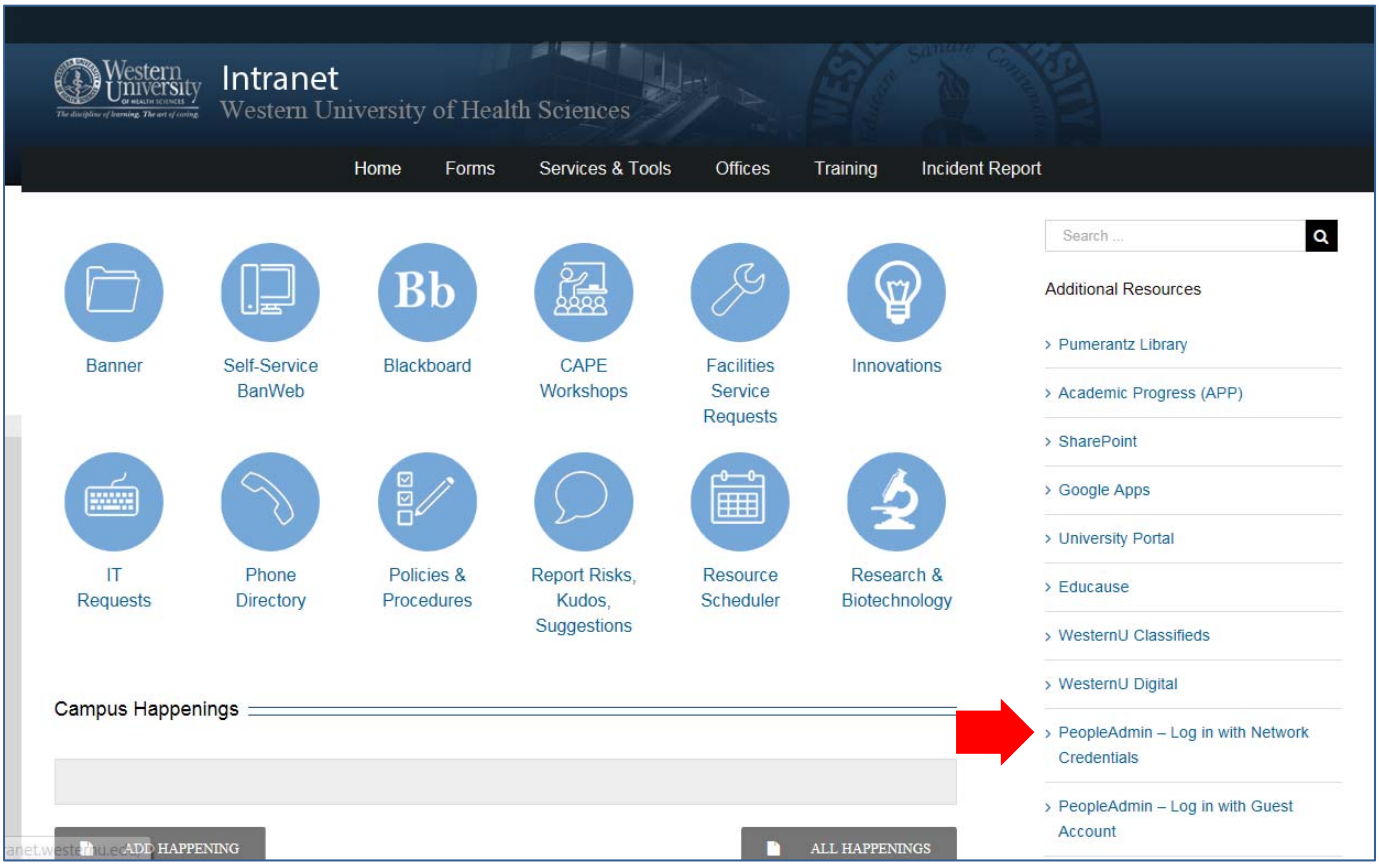
Quick Guide to the Employee Evaluation Process

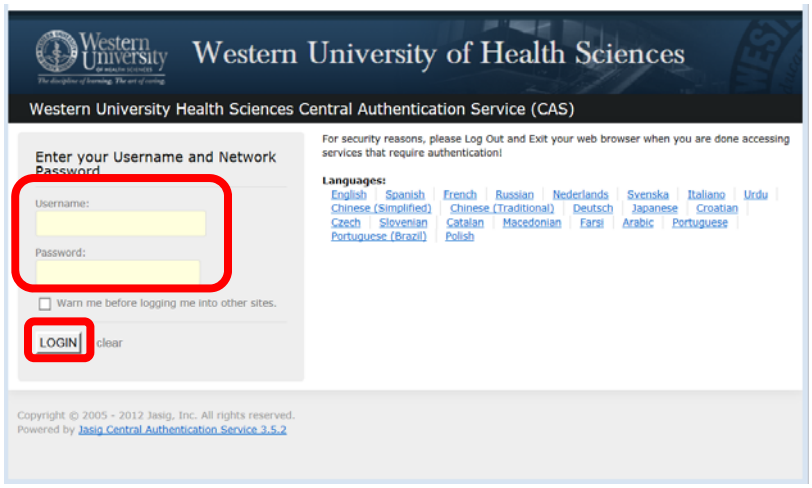
Part I: Accessing the PeopleAdmin system:

Step 1. Log in to the **WesternU PeopleAdmin** system either through our (a) Intranet or (b) off-site:

(a) Intranet Log in at: https://intranet.westernu.edu/

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

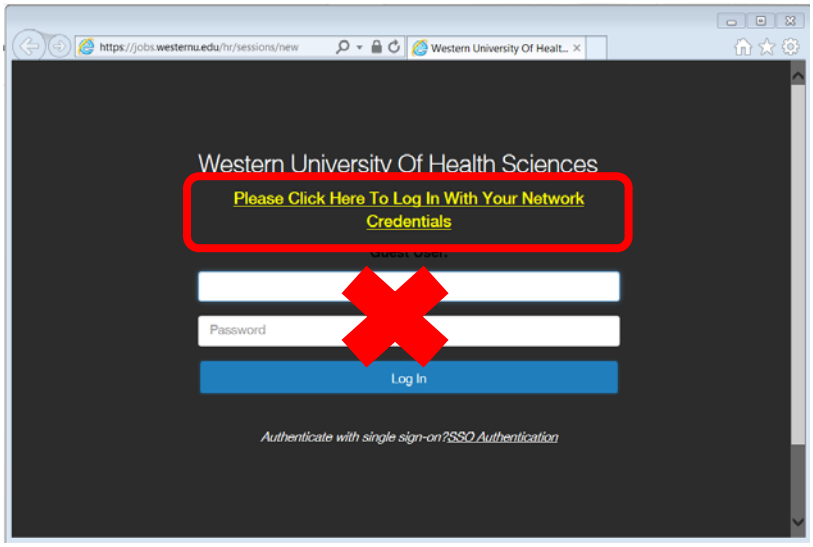




Enter your system Username and Password.

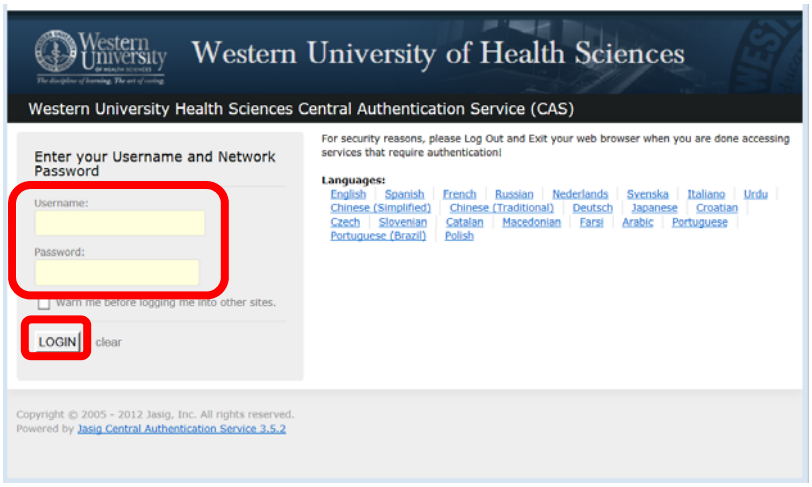
Click the **LOGIN** button.

(b) Off-site Log in at https://jobs.westernu.edu/hr



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

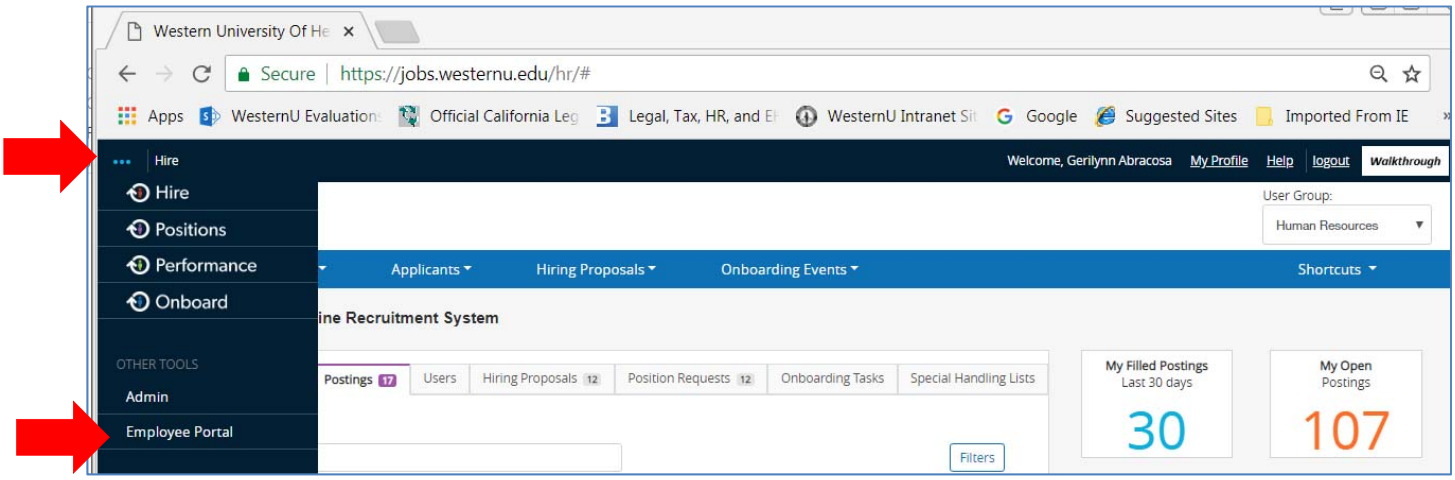
NOTE: *do NOT use the white fields shown in the window to log in.*



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.



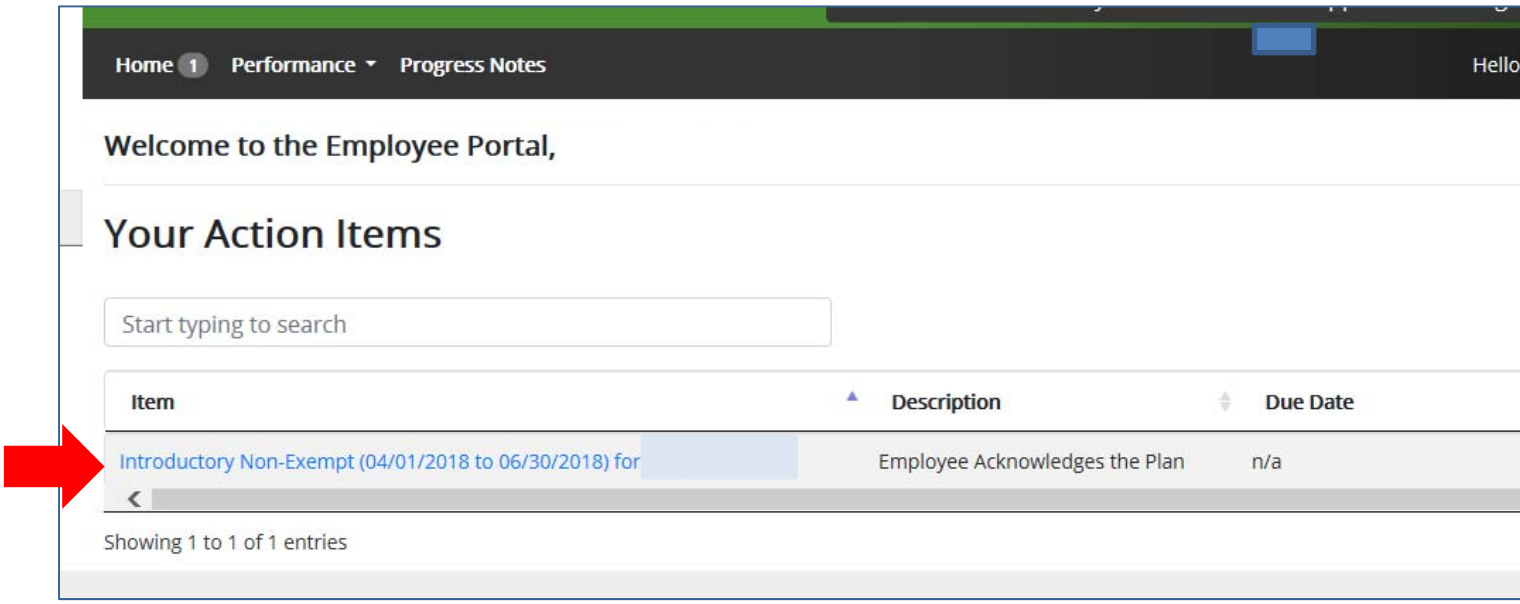
Part II: The Performance Evaluation Process:

Basic Steps for the Performance Evaluation Process:

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

The steps in red-font are the actions you will need to complete.

After you click on the **Employee Portal** link, your screen will show **Your Action Items.** This is the area you will locate the item you need to take action on:



Step 3. Your first action will be to complete the **Employee Acknowledge the Plan** step. You will receive an email notifying you when this action is available. You will log in as described above and click on the **Employee Acknowledges the Plan** link shown in Your Action Items List. This will bring up the Plan.

Review all the items on the plan and scroll to the bottom of the form. Enter a comment (optional) then click on **Acknowledge**. If the Plan needs to be modified, enter the needed modification on the Comment box and click on **Return**.

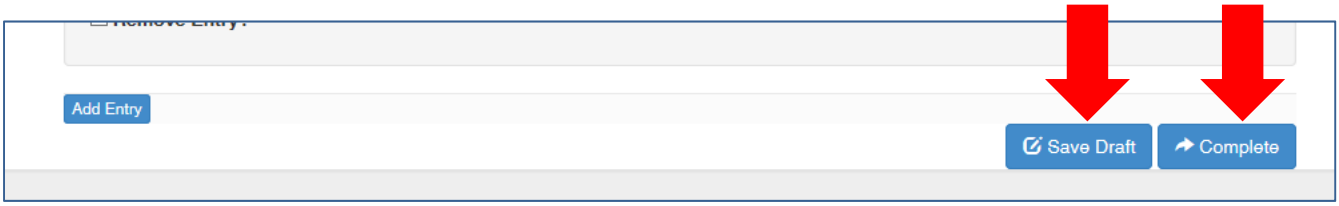
Steps 4 & 5 are for the Supervisor.

Step 6. Your next task will be to complete your **Employee Self-Evaluation** – you will receive an email notifying you when it is time to complete your self-evaluation.

You will now enter comments by completing all the following:

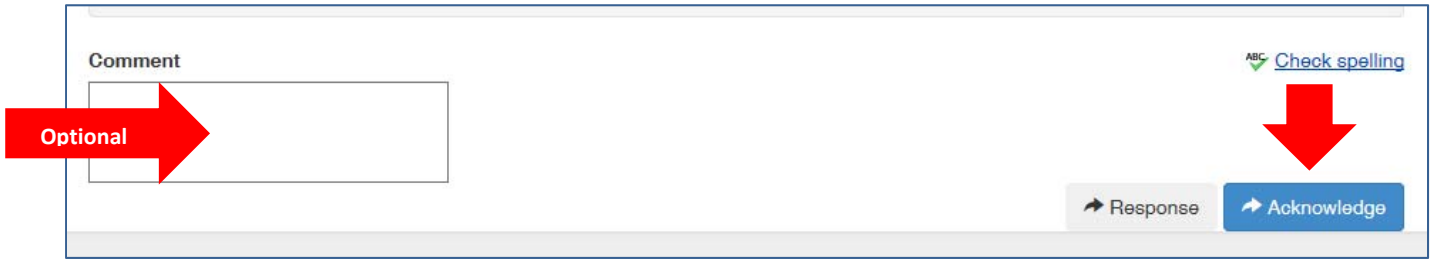
Performance Factors – **comments required**.
Essential Job Duties and Responsibilities – **comments optional unless required by your Supervisor**.
Goals – **comments required and at least 1 goal must be proposed for the next evaluation year.**

Click on **Complete** when you finish your self-evaluation. Click **Save Draft** if you want to continue working on it some more.



Steps 7-9 are for the Supervisor or the Reviewing Officer.

Step 10. Your final action will be to complete the **Employee Acknowledges Evaluation** step**.** You can enter Comments (optional) about your overall evaluation and your evaluation meeting and then click **Acknowledge**. Your evaluation is now complete.

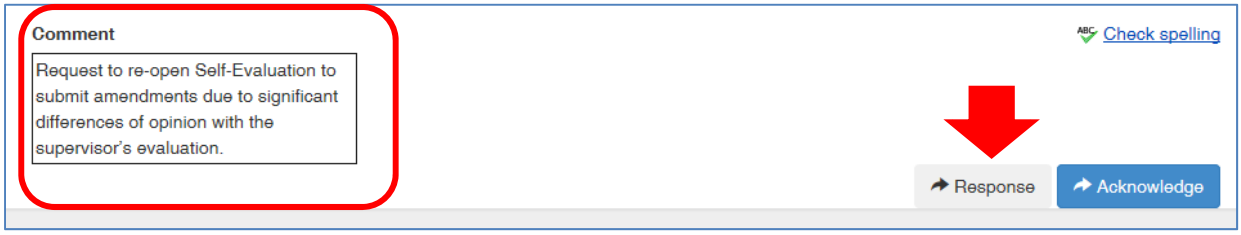


Part III. Additional Information *(Not Available for Introductory Evaluations)*:

This process is only available for the Annual Evaluation.

Major Differences of Opinion With the Supervisor's Evaluation (Response): If there are major differences of opinion between you and your supervisor about your evaluation, wherein you significantly disagree with the majority (more than half) of the ratings and in the overall rating, you may request to amend your self-evaluation to reflect your perspective in these items by following these steps:

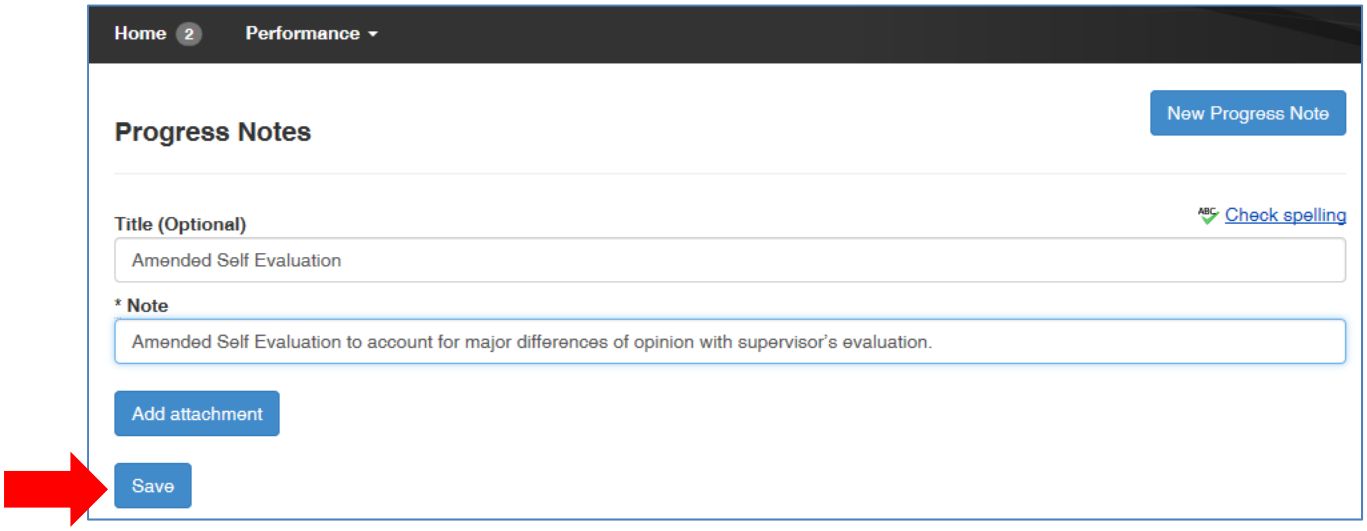
1. In the last step of **Employee Acknowledges Evaluation**, put a comment on the Comment box requesting to re-open your Self-Evaluation to enter changes and/or additional comments due to significant differences of opinion with the supervisor's evaluation.



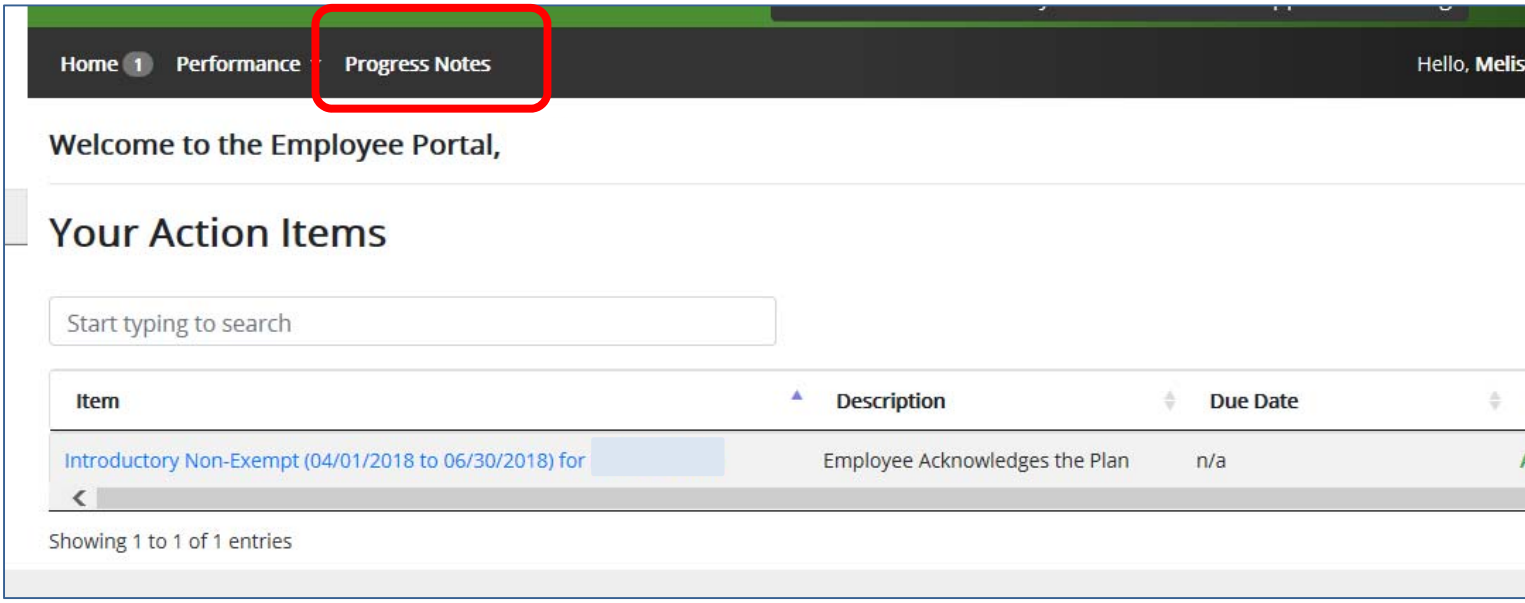
2. Click the **Response** button.

HR will re-open the Self-Evaluation step.

3. Enter additional comments and/or make changes in your self-evaluation form. You must complete all the changes and/or additional entries within 10 business days of re-opening the Self-Evaluation or by the end of the fiscal year (June 30), whichever occurs first. Click **Complete** to submit your amended Self-Evaluation.
4. Click on the **Progress Notes** link (see below) on the on the top of the menu bar and post an entry indicating that you have amended your Self Evaluation to account for major differences of opinion with the supervisor's evaluation. Click **Save**.



If the amended Self-Evaluation is not completed within 10 business days of re-opening the Self-Evaluation or by the end of the fiscal year (June 30), whichever occurs first, the program will close and the Self-Evaluation will remain as previously submitted without amendments.

Progress Notes: Progress Notes can be entered any time. This is an electronic record that can help you track your accomplishments and activities throughout the year.

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