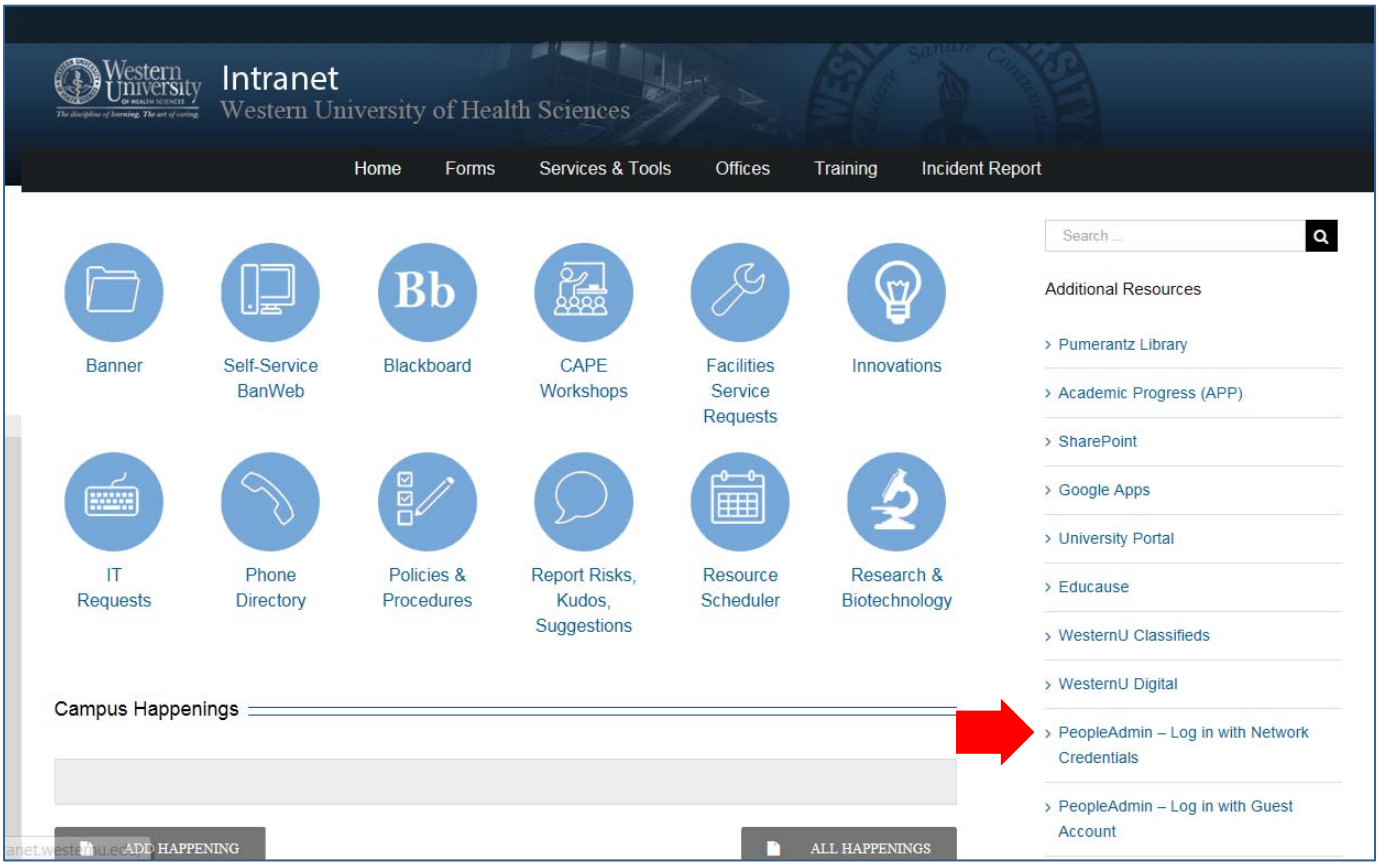
Supervisor's Quick Guide to the Evaluation Process

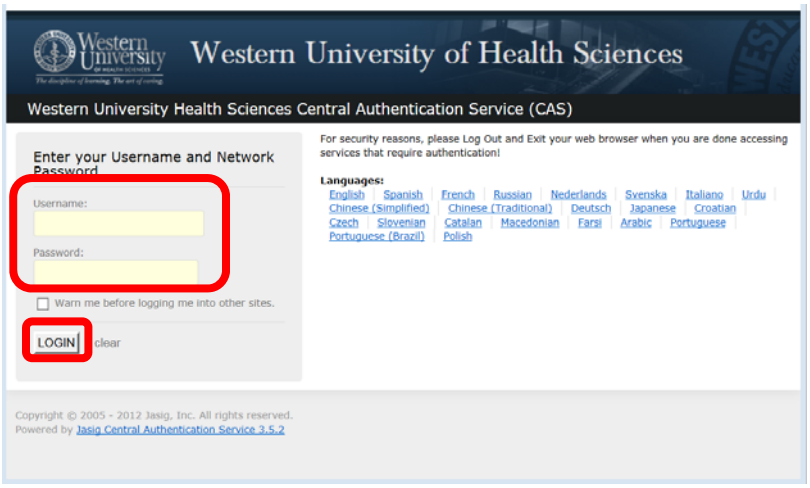
Part I: Accessing the PeopleAdmin system:

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:

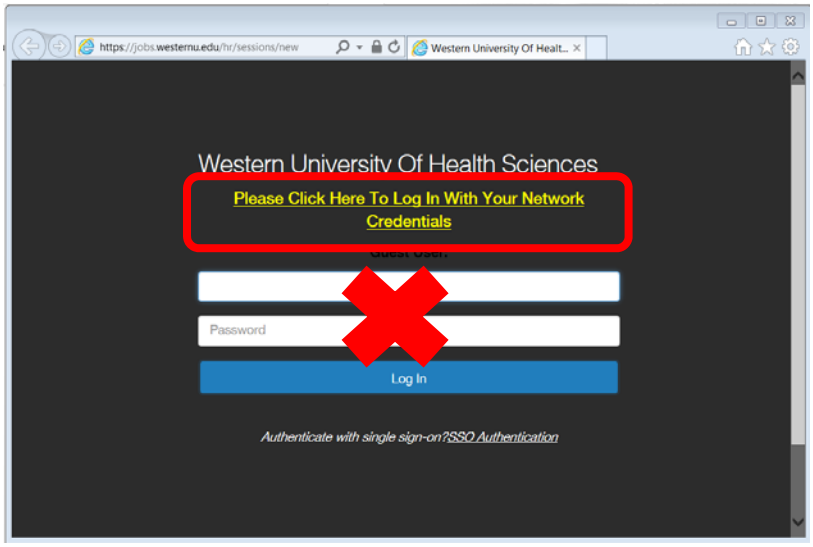




Enter your system Username and Password.

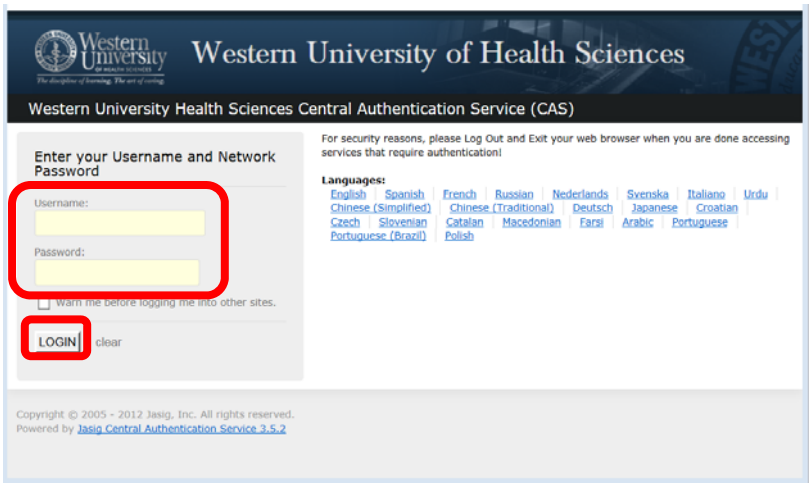
Click the **LOGIN** button.

(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**

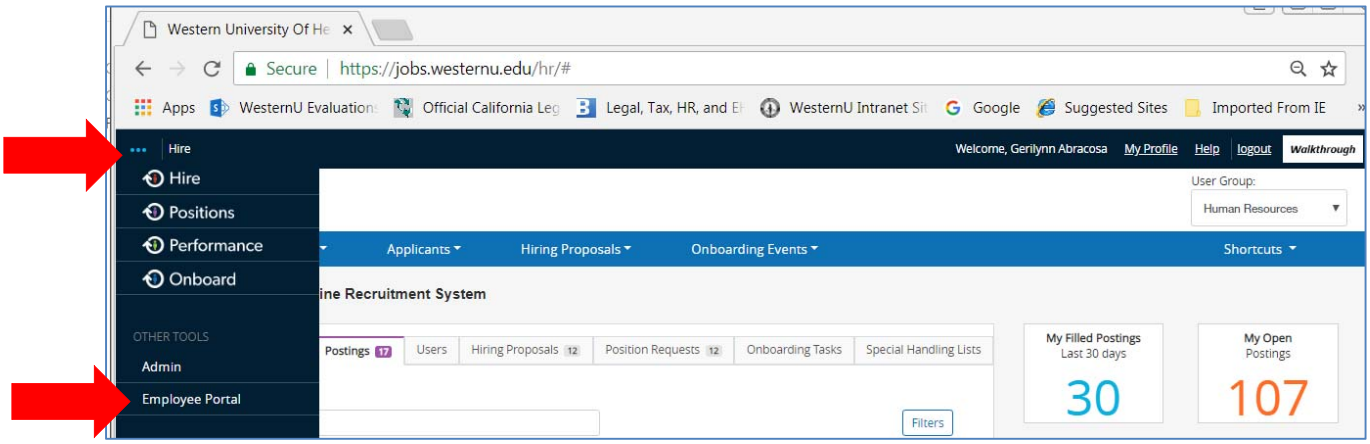
NOTE: *do NOT use the white fields shown in the window to log in.*



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.

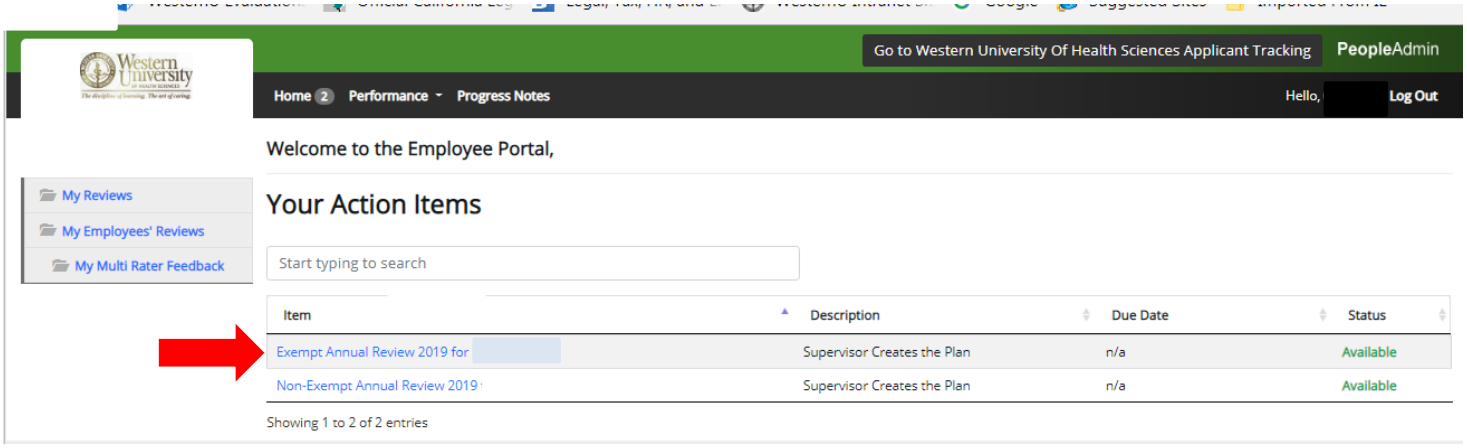


Part II: The Performance Evaluation Process:

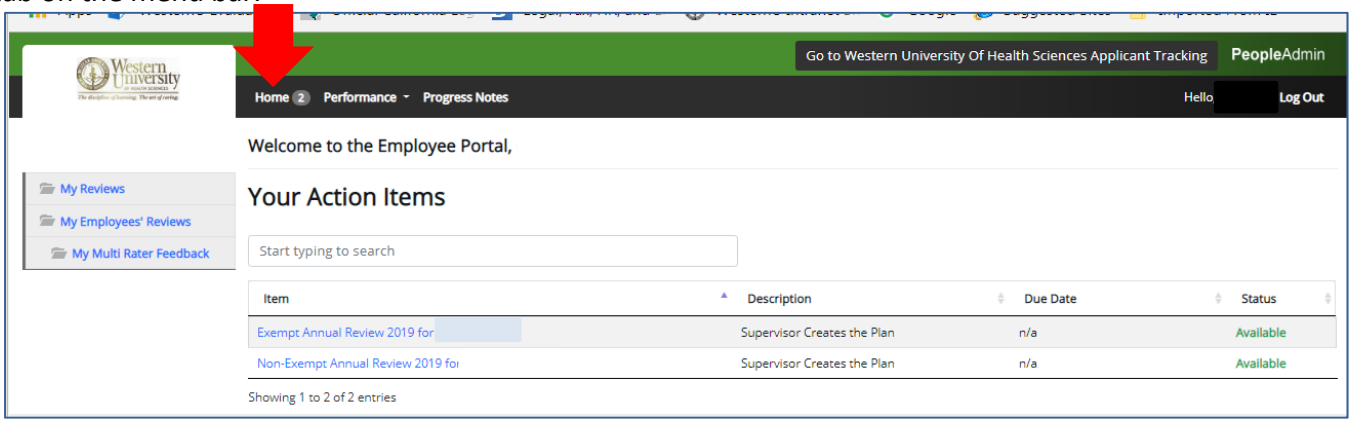
Basic Steps for the Performance Evaluation Process:

1. 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

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 2019 for -----).**



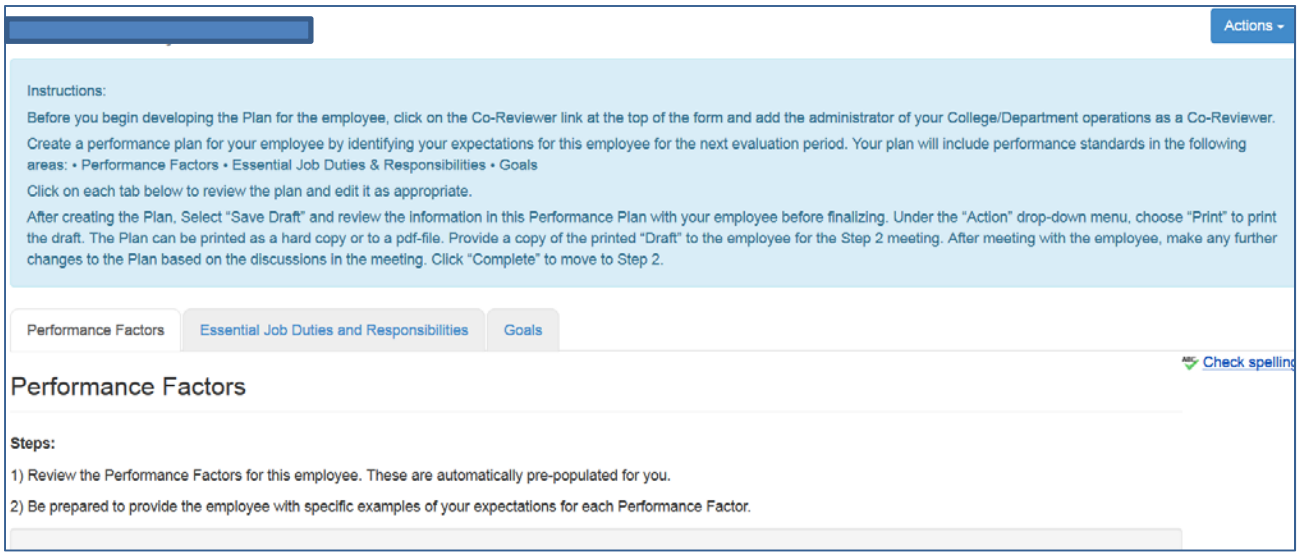
Note: Anytime you are in PeopleAdmin and you don't see **Your Action Items** screen, click on the **Home** tab on the menu bar.



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 **– you must add job duty weight.**
3) **Goals –Must add a minimum of 2 goals.** ***(These goals will be pre-filled for you if you finished the employee's last performance evaluation.)***

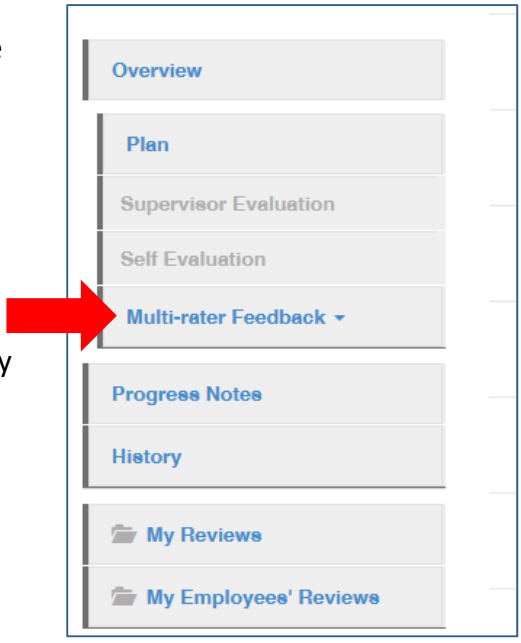
Once you have all the employees' goals in the plan **- Click Complete** (or **Save Draft** if you still need to work on it).



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

Step 4- You will receive an email notifying you that you have an action due **– 6 Month Progress Check In** Schedule this outside the system – log in and mark the task **Complete**.

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. You 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**.
Essential Job Duties and Responsibilities – **comments optional unless they are rated 1 or 5**.
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, mark the task **Complete**. Once you mark the task complete the evaluation will be sent to your Reviewing Officer for approval.

Step 9 - **Reviewing Officer** (Supervisor's Supervisor) -The Reviewer will have the opportunity to review the Supervisor Evaluation and return it to the supervisor if edits are required. If the performance evaluation does not require any changes, the Reviewer will **click on Approved.**

Step 10 – **Employee Acknowledges Evaluation:** The final step belongs to the Employee, the employee must acknowledge their review.

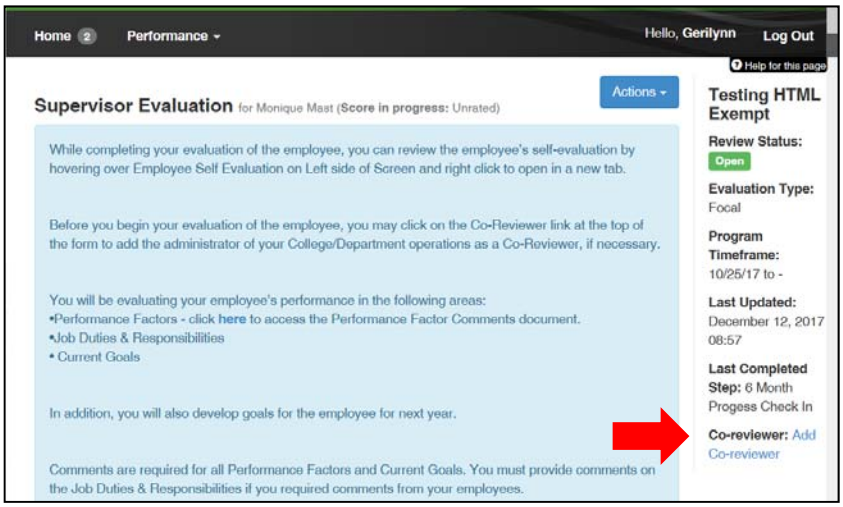
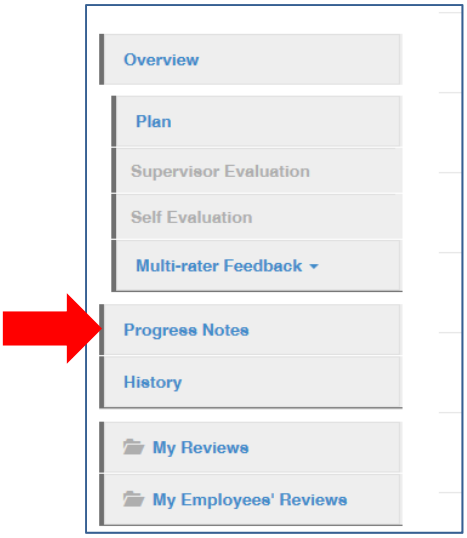
You have now finished the requirements for the Performance Evaluation Program.

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.