

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:

Western University of Health Sciences Intranet

Home Forms Services & Tools Offices Training Incident Report

Search ...

Additional Resources

- > Pumerantz Library
- > Academic Progress (APP)
- > SharePoint
- > Google Apps
- > University Portal
- > Educause
- > WesternU Classifieds
- > WesternU Digital
- > PeopleAdmin – Log in with Network Credentials
- > PeopleAdmin – Log in with Guest Account

Campus Happenings

ADD HAPPENING ALL HAPPENINGS

Western University of Health Sciences

Western University Health Sciences Central Authentication Service (CAS)

Enter your Username and Network Password

Username:

Password:

Warn me before logging me into other sites.

clear

For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

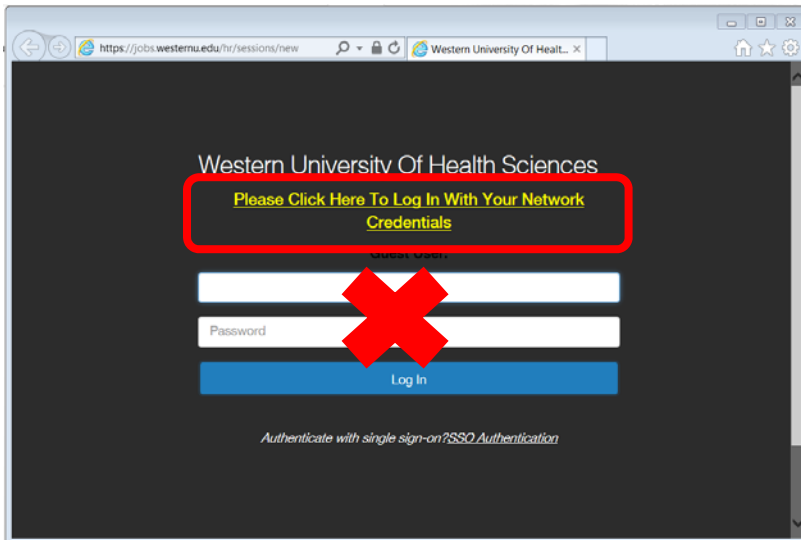
Languages: English, Spanish, French, Russian, Nederlands, Svenska, Italiano, Urdu, Chinese (Simplified), Chinese (Traditional), Deutsch, Japanese, Croatian, Czech, Slovenian, Catalan, Macedonian, Farsi, Arabic, Portuguese, Portuguese (Brazil), Polish

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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

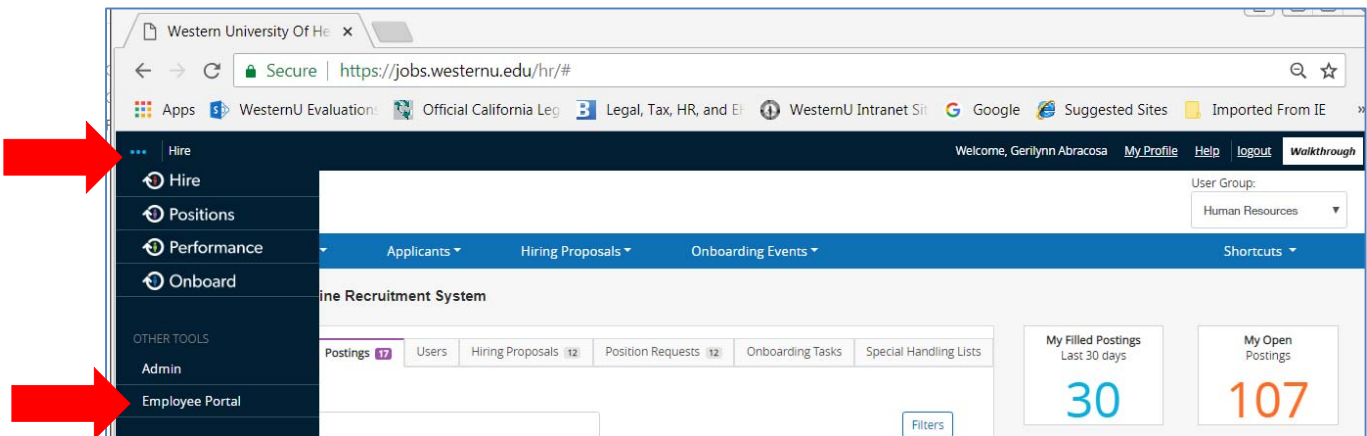
NOTE: do NOT use the white fields shown in the window to log in.



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.

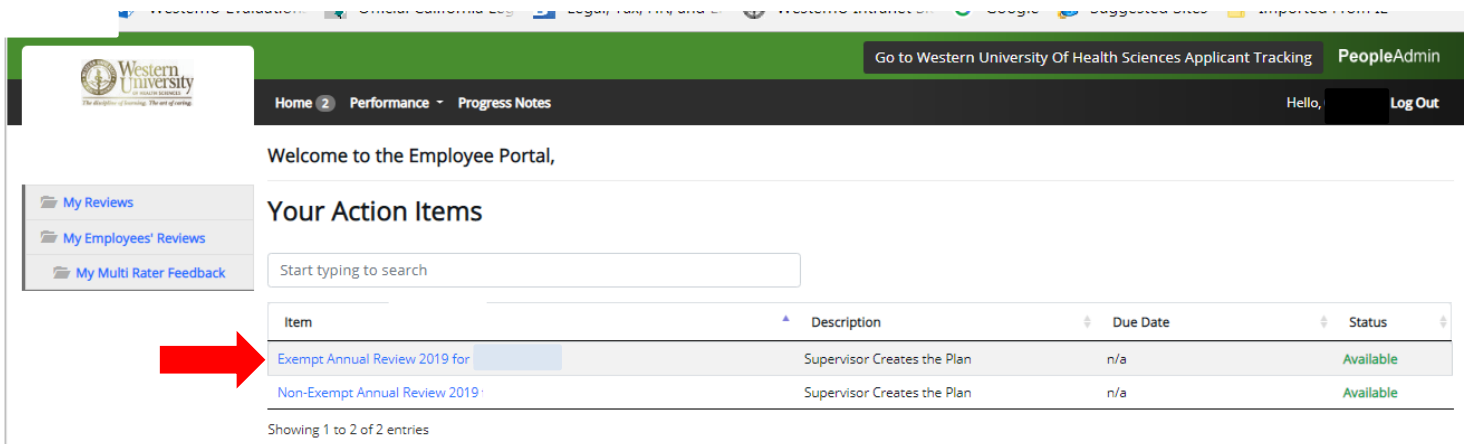


Part II: The Performance Evaluation Process:

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 -----)**.



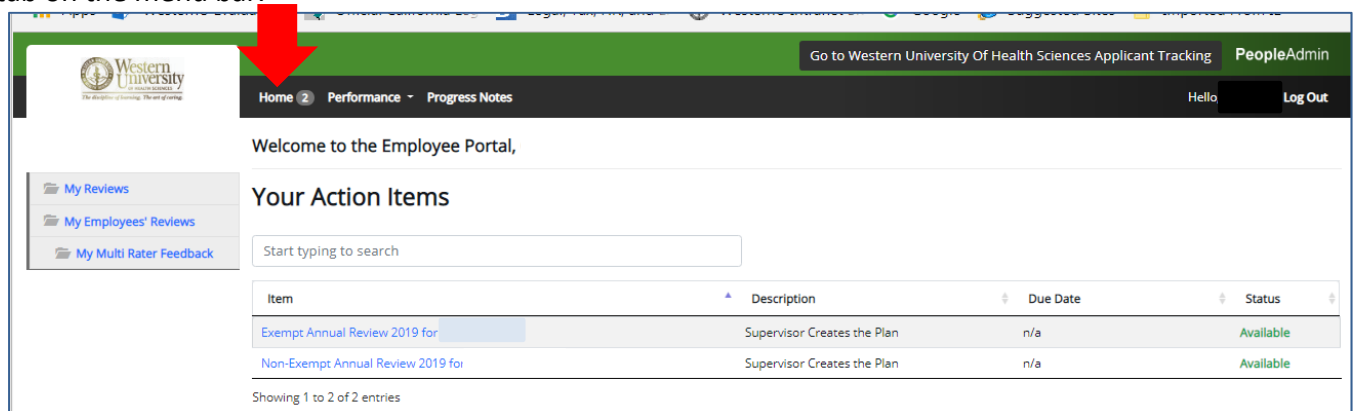
The screenshot shows the Western University Employee Portal. The top navigation bar includes the Western University logo, a search bar, and links for 'Go to Western University Of Health Sciences Applicant Tracking' and 'PeopleAdmin'. The main menu has 'Home', 'Performance', and 'Progress Notes' tabs. The user is logged in as 'Hello, [Name]' and can 'Log Out'.

The page content includes a welcome message and a 'Your Action Items' section. On the left, there are navigation links for 'My Reviews', 'My Employees' Reviews', and 'My Multi Rater Feedback'. A search bar is provided for finding items.

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

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 previous one, showing the 'Your Action Items' screen. A red arrow points to the 'Home' tab in the main navigation menu, indicating the correct action to take 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 – **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).

Instructions:
Before you begin developing the Plan for the employee, click on the Co-Reviewer link at the top of the form and add the administrator of your College/Department operations as a Co-Reviewer. Create a performance plan for your employee by identifying your expectations for this employee for the next evaluation period. Your plan will include performance standards in the following areas: • Performance Factors • Essential Job Duties & Responsibilities • Goals
Click on each tab below to review the plan and edit it as appropriate.
After creating the Plan, Select "Save Draft" and review the information in this Performance Plan with your employee before finalizing. Under the "Action" drop-down menu, choose "Print" to print the draft. The Plan can be printed as a hard copy or to a pdf-file. Provide a copy of the printed "Draft" to the employee for the Step 2 meeting. After meeting with the employee, make any further changes to the Plan based on the discussions in the meeting. Click "Complete" to move to Step 2.

Performance Factors Essential Job Duties and Responsibilities Goals

Performance Factors Check spelling

Steps:
1) Review the Performance Factors for this employee. These are automatically pre-populated for you.
2) Be prepared to provide the employee with specific examples of your expectations for each Performance Factor.

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.

- Overview
- Plan
- Supervisor Evaluation
- Self Evaluation
- Multi-rater Feedback** ▾
- Progress Notes
- History
- My Reviews
- My Employees' Reviews

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.

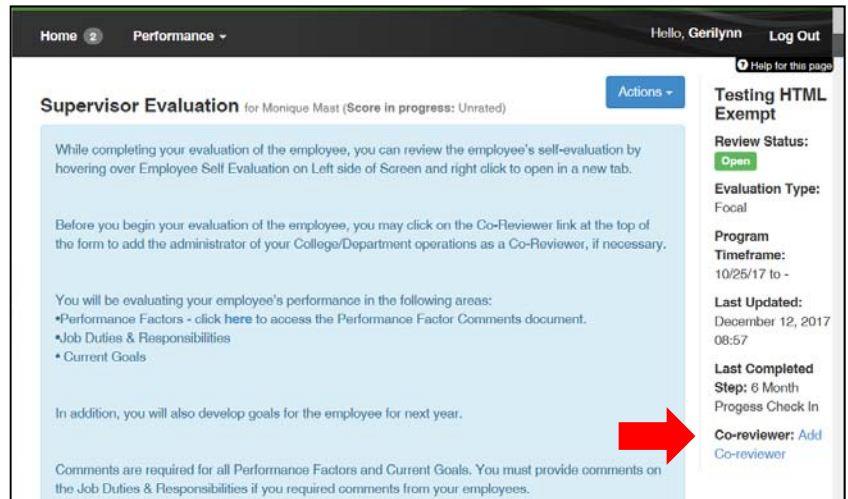
You have now finished the requirements for the Performance Evaluation Program.

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.

