



Pacific Lutheran University Human Resources

**Performance Management
Launch of Online Module**

Agenda

1. PLU's Performance Management Philosophy and Key Program Components
2. Logging-In and Employee Portal
3. Overview of System Steps
4. Additional System Functionality
5. Questions

PLU's Philosophy

Performance management is an ongoing, continuous process of communicating and clarifying job responsibilities, priorities and performance expectations in order to ensure mutual understanding between supervisor and employee.

It is a philosophy which values and encourages employee development through a style of management which provides frequent feedback and fosters teamwork.

It emphasizes communication and focuses on adding value to the university by promoting improved job performance and encouraging skill development.

Performance Management involves clarifying the job duties, defining performance standards, documenting, evaluating, and discussing performance with each employee.

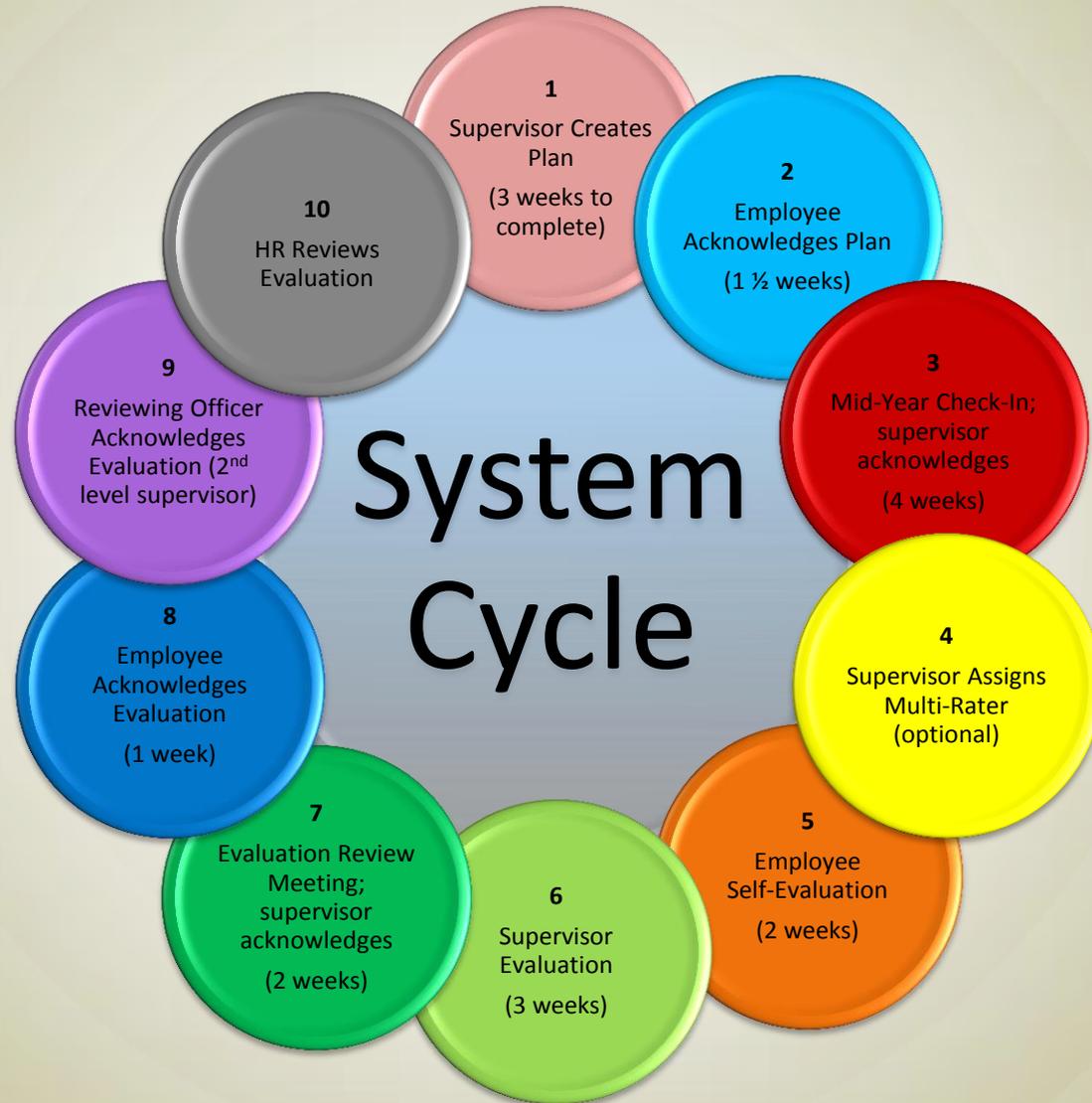
PLU's Approach

- Performance management is not just about annual reviews, but captures the entire employment relationship
 - Position Description = Tool to Hire Right & Employment Foundation
 - Job (*performance and behavior*) Expectations = Accountability
 - On-Going, Clear Communication = Shared Responsibility
 - Performance Review = Assessment & Feedback
 - Professional Development Plan = Career Progression
 - Performance Improvement Plan = Course Correction
- Effective performance management requires policy adherence, **time investment**, commitment, transparency, and quality systems

Shared Responsibility

- Establish clarity on job expectations, position description and duties
- On-going communication between supervisor and employee
- Supervisor and employee document year-round

Performance Management



Key Module Components

1. Supervisor Creates Plan – beginning of cycle, review job description; set action plan and career development goals
2. Employee Acknowledges Plan – review competencies, action plan and career development goals
3. Mid-Year Check-In – conversation between employee and supervisor
4. Supervisor Assigns Multi-Rater (optional) – if utilize, thoughtful selection
5. Employee Self-Evaluation – focus on narrative and development

Key Module Components

6. Supervisor Evaluation – assign ratings and narrative; address progress on action plan and career development
7. Evaluation Review Meeting – conversation to discuss review; supervisor acknowledges
8. Employee Acknowledges Evaluation
9. Reviewing Officer Acknowledges – 2nd level supervisor; ensures higher level involvement
10. HR Reviews Evaluation – copy of supervisor evaluation kept in personnel file

System Cycle

- The beginning of the process is triggered by the employee's anniversary date.
- Tasks that need to be completed will be prompted by emails from the system.
- In a typical year, the employee evaluation is completed, then the supervisor creates next year's plan immediately following.
- Introductory reviews do not include the mid-year check-in, multi-raters, and self-evaluation steps.
- Only action items requiring action will be listed on the homepage in the Employee Portal.

PLU's Program Enhancements

- Opportunity to raise PLU's performance management initiatives to next level
- System compliments PLU's Performance Management Philosophy and approach
- Move away from paper to online platform
- Comprehensive program – front end focus

PLU's Program Enhancements

- On-going communication between supervisor and employee
- Transparency
- Evolving culture shift
 - Shared Responsibility and Accountability
- Increase compliance and participation

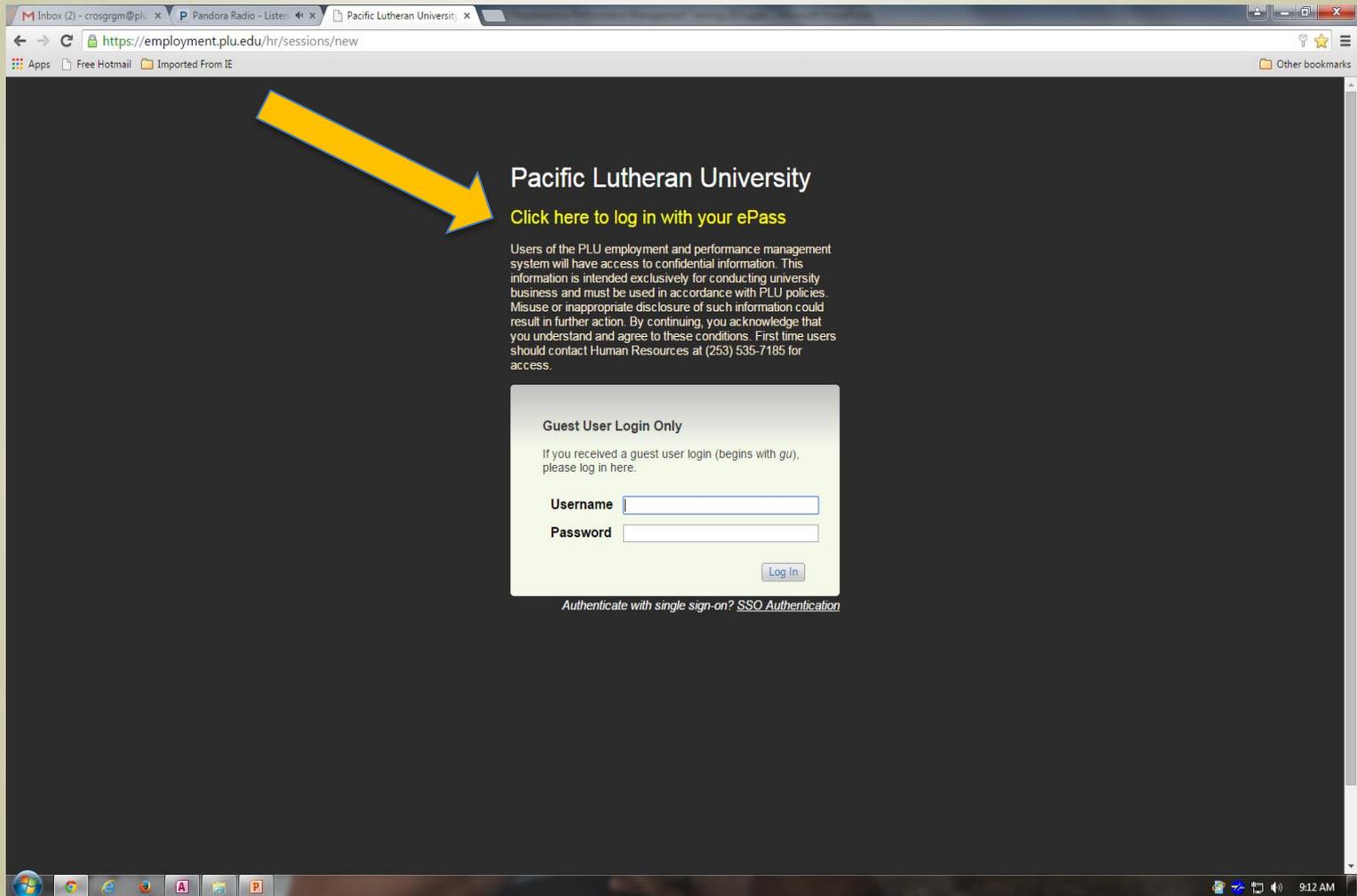
PeopleAdmin Login

<https://employment.plu.edu/hr>

Logging In & Home Page

Log in: <https://employment.plu.edu/hr>

Click on the yellow link!!! If prompted, use your regular ePass username and password.



The screenshot shows a web browser window with the address bar displaying <https://employment.plu.edu/hr/sessions/new>. The page content includes the Pacific Lutheran University logo and a yellow link that says "Click here to log in with your ePass". Below this link is a disclaimer about confidential information. A white box titled "Guest User Login Only" contains fields for "Username" and "Password", and a "Log In" button. At the bottom of the page, there is a link for "Authenticate with single sign-on? SSO Authentication". A yellow arrow points from the top left towards the yellow link.

Pacific Lutheran University

[Click here to log in with your ePass](#)

Users of the PLU employment and performance management system will have access to confidential information. This information is intended exclusively for conducting university business and must be used in accordance with PLU policies. Misuse or inappropriate disclosure of such information could result in further action. By continuing, you acknowledge that you understand and agree to these conditions. First time users should contact Human Resources at (253) 535-7185 for access.

Guest User Login Only

If you received a guest user login (begins with *gu*), please log in here.

Username

Password

[Authenticate with single sign-on? SSO Authentication](#)

Logging In & Home Page

Click on “Go to Employee Portal” in the upper right corner.

The screenshot shows a web browser window with the URL <https://employment.plu.edu/hr>. The page header features the PLU logo on the left and a navigation menu with links for Home, Programs, Reviews, Users, My Profile, and Help. In the top right corner, there is a user profile for Gretchen Howell with 0 messages and a log out option. A yellow arrow points to a 'Go to Employee Portal' link located next to a 'PeopleAdmin' dropdown menu.

The main content area is titled 'Welcome to your Online Recruitment System'. It contains two primary sections:

- Inbox (0 items need your attention)**: Displays items for the group 'Human Resources'. It includes sub-sections for Postings (0), Users (0), and Restricted Lists (0). Below these is a table with columns: Job Title, Type, Current State, and Owner.
- Watch List (0 items)**: Includes a sub-section for Postings (0) and a table with columns: Job Title, Type, Current State, and State Owner.

The right sidebar contains several utility sections:

- Shortcuts**: Includes links for 'View Document Conversions Report', 'Create New Faculty / Staff Posting', and 'My Reports'.
- My Links**: Includes a 'Useful Links' section with links to 'Your Applicant Portal', 'User Guide: Faculty/Staff Employment System', 'Guide to Effective Interviewing and Selection of Staff and Administrators', 'Faculty Search Procedure', and 'Procedures for Hiring Foreign National Faculty'.
- Benefits Overview**: Includes links for 'Waiver for Background Check' and 'Salary Ranges'.

The Windows taskbar at the bottom shows the system clock at 10:10 AM.

Employee Portal

Default Home Page

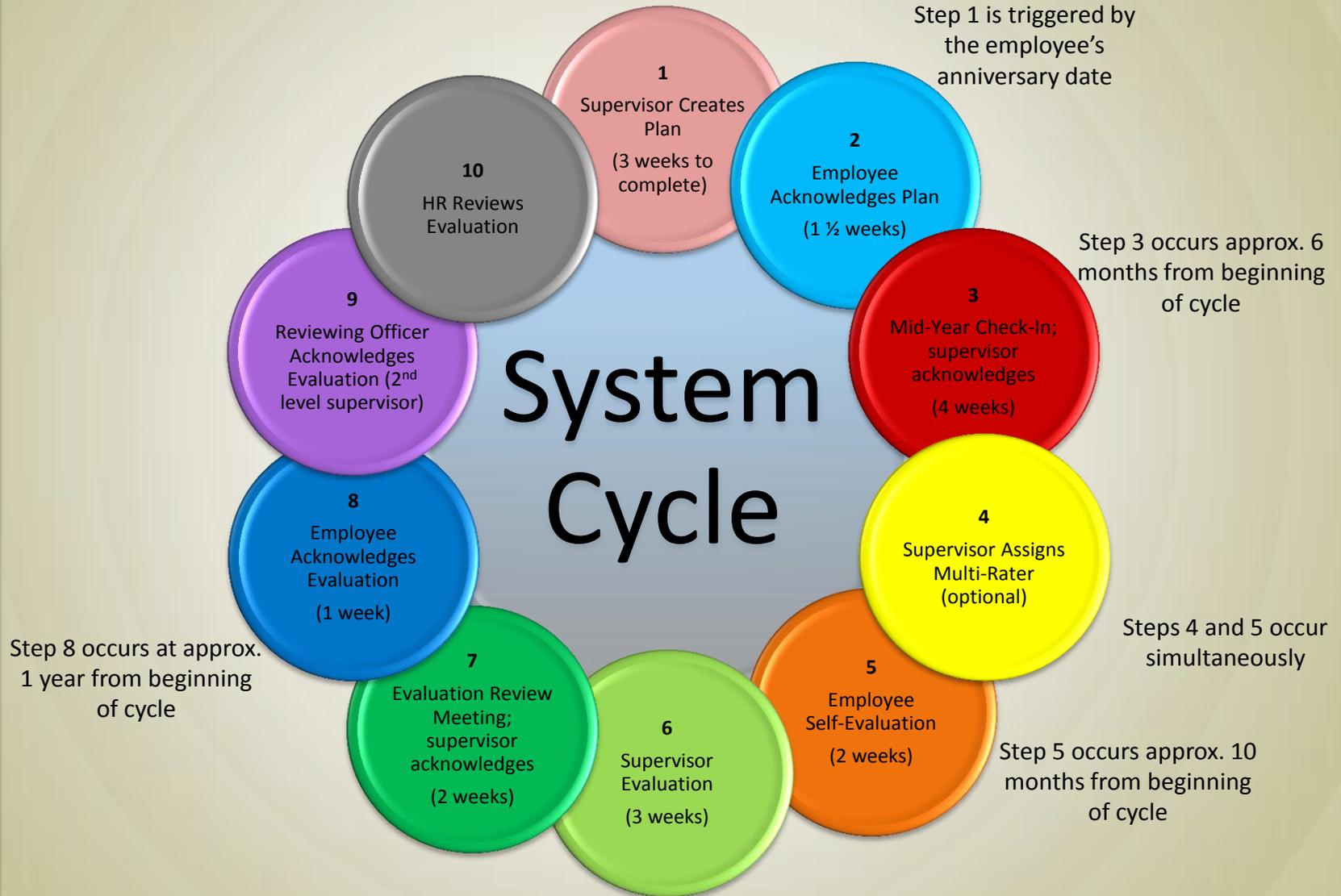
“home” – all the action items coming up and overdue

The screenshot displays the PLU Employee Portal home page. The browser address bar shows the URL <https://employment.plu.edu/portal>. The page header includes the PLU logo, navigation tabs for 'Home' and 'Performance', and user information: 'Hello, Erin' and 'Log Out'. A 'Go to PLU - HR Suite' button and 'PeopleAdmin' link are also present. A 'Help for this page' button is located in the top right corner.

The main content area features a 'Welcome to the Employee Portal, Erin McGinnis' message. Below this is a section titled 'Your Action Items' containing a table with the following data:

Item	Description	Due Date	Status	Action
2015 Annual Review Pilot Group 1 for Rebecca Farris	Supervisor Creates Plan	2015-01-23 Due 6 months ago	Overdue	View
2015 Annual Review Pilot Group 1 for Erica Fickeisen	Supervisor Creates Plan	2015-05-26 Due 2 months ago	Overdue	View
2015 Annual Review Pilot Group 1 for Valerie Seeley	Supervisor Creates Plan	2015-07-20 Due 16 days ago	Overdue	View
2015 Annual Review Pilot Group 1 for Thomas Harvey	Supervisor Creates Plan	2015-07-25 Due 11 days ago	Overdue	View
2015 Annual Review Pilot Group 1 for Jennifer Stolz	Supervisor Creates Plan	2015-08-12 Due in 7 days	Upcoming	View

Performance Management



SUPERVISOR CREATES PLAN

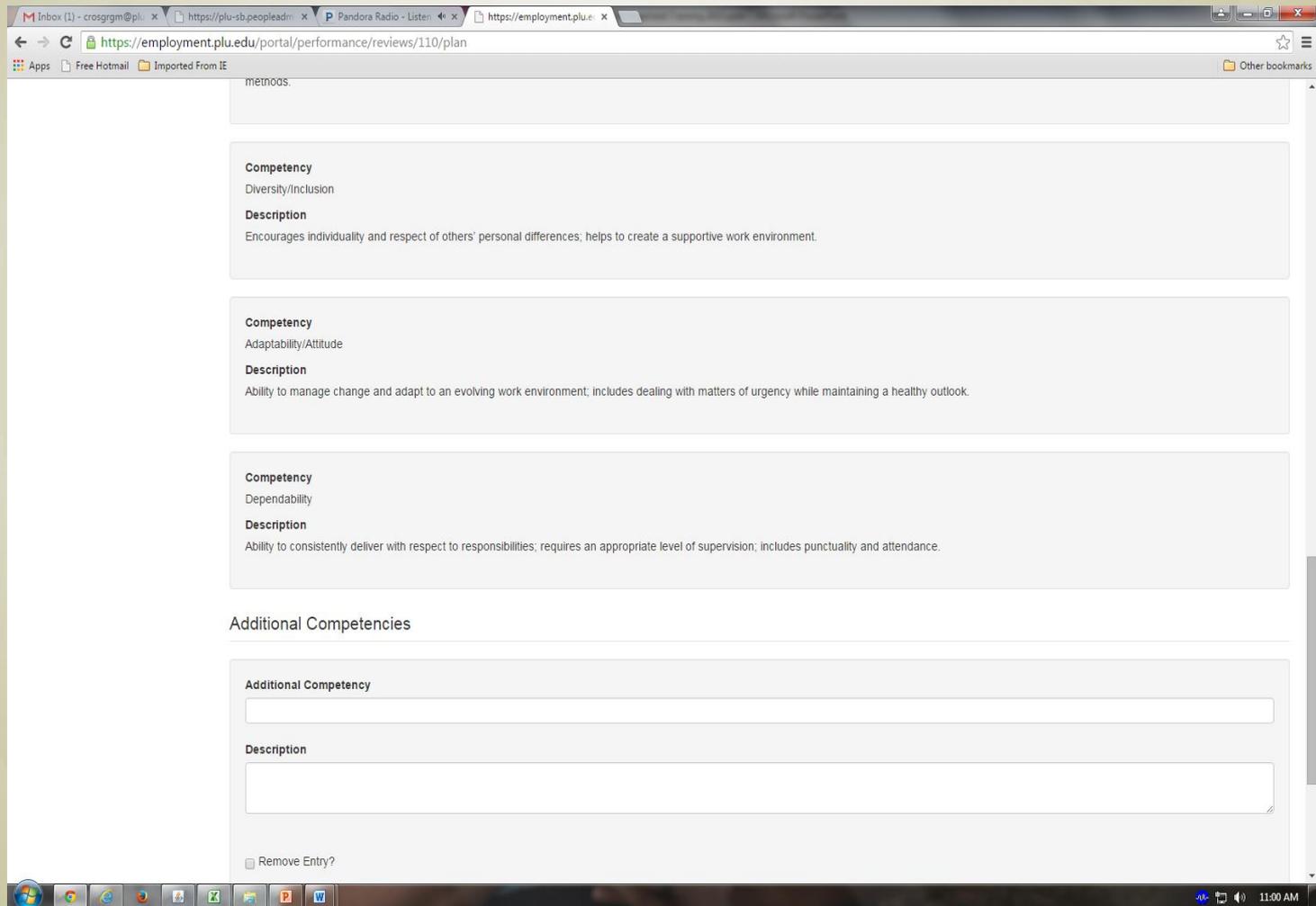
Supervisor Creates Plan: Review Job Description

- From the “Home” button view action items which are due and select “Supervisor Creates Plan”
- The job description is not kept in the PeopleAdmin Performance Management system; however, you will need to confirm that you have reviewed the current job description with your employee
- If the job description has changed significantly, submit an updated version to Human Resources

The screenshot displays the '2015 Annual Review Pilot Group 2' page for Gretchen Howell. The interface includes a sidebar with navigation options: Overview, Plan, Supervisor Evaluation, Self Evaluation, Progress Notes, History, My Reviews, and My Employees' Reviews. The main content area shows the 'Plan' section for Gretchen Howell, with a blue box containing instructions: 'It is now time to create the performance plan for your employee. You also have the ability to add competencies for your employee, as appropriate. This plan allows you, and the university, to set clear expectations of how your employee will be successful in their role. Once you have created the performance plan, your employee will be required to acknowledge that they have received the plan.' Below this, there are tabs for Introduction, Job Description, Core Competencies, Action Plan/Goals, and Career Development/Plan. The 'Job Description' tab is active, showing a section titled 'Job Description' with the text: 'A job description is a vital component of the Performance Management process. Though the job description is not maintained in this system, in order to proceed, it is important that the job description has been reviewed and is up to date.' A red warning message states: 'This section is required. Do not remove this entry as you will not be able to move forward.' Below this, there is a checkbox for 'Remove Entry?' and a note: '* Please check the box to indicate that you've reviewed the job description for this position. If there have been significant changes to the job description, submit an updated version to Human Resources.'

Supervisor Creates Plan: Core Competencies

- Eight (8) core competencies all staff and administrators evaluated on; supervisor cannot edit
- Supervisor has the ability to add additional competencies to an individual's review



The screenshot displays a web browser window with the URL <https://employment.plu.edu/portal/performance/reviews/110/plan>. The page content includes a search bar with the text "mietnoos." and three core competency entries, each with a title and a description:

- Competency**
Diversity/Inclusion
Description
Encourages individuality and respect of others' personal differences; helps to create a supportive work environment.
- Competency**
Adaptability/Attitude
Description
Ability to manage change and adapt to an evolving work environment; includes dealing with matters of urgency while maintaining a healthy outlook.
- Competency**
Dependability
Description
Ability to consistently deliver with respect to responsibilities; requires an appropriate level of supervision; includes punctuality and attendance.

Below these entries is a section titled "Additional Competencies" which contains a form for adding a new competency. The form has two input fields:

- Additional Competency**: A text input field.
- Description**: A larger text area for describing the competency.

At the bottom of the form, there is a checkbox labeled "Remove Entry?". The browser's taskbar at the bottom shows the Windows logo, several application icons, and the system clock displaying "11:00 AM".

Core Competencies

1. Quality of Work/Productivity
2. Service Focus
3. Communication
4. Problem Solving/Critical Thinking
5. Leadership/Initiative
6. Diversity/Inclusion
7. Adaptability/Attitude
8. Dependability

Supervisor Creates Plan: Action Plan/Goals

- Select two or three aspects of the job you would like to improve, develop, change or learn.
- Describe what you will do to help achieve desired change or improvement. Set realistic goals. Furnish a time frame for implementation of plans, procedures and methods.
- To enter additional goals – click on “Add entry”

The screenshot displays the PLU PeopleAdmin interface. The top navigation bar includes the PLU logo, a breadcrumb trail (Home > Performance >), and user information (Hello, Teri, Log Out). The main content area is titled '2015 Annual Review Pilot Group 2' and shows details for Gretchen Howell, including her supervisor (Teri Phillips) and department (Human Resources). The 'Plan' section for Gretchen Howell is active, with a blue informational box stating: 'It is now time to create the performance plan for your employee. You also have the ability to add competencies for your employee, as appropriate. This plan allows you, and the university, to set clear expectations of how your employee will be successful in their role. Once you have created the performance plan, your employee will be required to acknowledge that they have received the plan.' Below this, there are tabs for 'Introduction', 'Job Description', 'Core Competencies', 'Action Plan/Goals', and 'Career Development/Plan'. The 'Action Plan/Goals' tab is selected, showing a form with the following fields: '* Action Plan/Goal Name' (text input), '* Goal Description' (text area), and a 'Remove Entry?' checkbox. The bottom of the screen shows the Windows taskbar with the time 11:15 AM.

Goal Statements

- Strategically aligned
- Objective in measurement
- SMART formula (Specific, Measurable, Agreed upon, Relevant, Timed)
- May be necessary to revise or eliminate certain goals throughout the year

Supervisor Creates Plan: Career Development

- Select one or two developmental activities pertaining to performance improvement, career advancement, training, education, etc.
- To enter additional goals – click on “Add entry”

Teri Phillips
Department
Human Resources

Evaluation Type: Anniversary
Program Timeframe: 01/01/15 to -
Review Status: **Overdue**
Last Updated: June 11, 2015 14:40

Plan for Gretchen Howell

It is now time to create the performance plan for your employee. You also have the ability to add competencies for your employee, as appropriate. This plan allows you, and the university, to set clear expectations of how your employee will be successful in their role.

Once you have created the performance plan, your employee will be required to acknowledge that they have received the plan.

Introduction Job Description Core Competencies Action Plan/Goals **Career Development/Plan**

Required fields are indicated with an asterisk (*).

Career Development/Plan

The purpose of recording developmental activities is to formalize and track any activities pertaining to performance improvement, career advancement, training, education, etc.

* Career Development/Plan Name

* Description

Remove Entry?

Add Entry

Any comments left when acknowledging the plan will be shared with your supervisor.

EMPLOYEE ACKNOWLEDGES PLAN

Employee Acknowledges Plan

- From the “Home” button view action items which are due and select “Employee Acknowledges Plan”
- Review entire plan including competencies, action plan/goals, and career development
- If employee has concerns over the plan, the employee should meet with his/her supervisor
- Comments are optional – will be shared with your supervisor

The screenshot displays the PLU PeopleAdmin interface. The user is Nancy Rahn, a supervisor for Erin McGinnis in the Dining and Culinary Services department. The page shows a 2015 Annual Review Pilot Group 1 with an overdue status. The main section is titled "Plan for Nancy Rahn" and contains instructions for reviewing the plan, including a note that comments will be shared with the supervisor. The page also includes sections for "Purpose" and "Definitions".

PLU PeopleAdmin
Go to PLU - HR Suite
Hello, Nancy Log Out
Help for this page

Nancy Rahn
Supervisor
Erin McGinnis
Department
Dining and Culinary Services

2015 Annual Review Pilot Group 1

Evaluation Type: Anniversary	Review Status: Overdue
Program Timeframe: 01/01/15 to -	Last Updated: June 05, 2015 10:01
	Last Completed Step: Supervisor Creates Plan

Plan for Nancy Rahn Actions ▾

It is important to your supervisor, and the university, that you understand what is expected of you to be successful in your role. The items listed below give you the details necessary to fully understand how your performance will be measured at the end of the review period.

Please review your plan in detail, ask your supervisor if you have any questions, and then click "Acknowledge" at the bottom of the plan.

You may review your plan at any time by returning to this page. You may also record progress notes by clicking on the "Progress Notes" tab. These notes are confidential to you, for you to use as you deem appropriate.

Your supervisor will be able to see any comments you enter when acknowledging the plan.

Purpose

The purpose of the performance management system is to assist university in building a better organization through proper planning, setting expectations, and facilitating conversations between supervisors and employees to improve work performance, assist with employee career development, identify areas for improvement, and achieve overall goals of the organization.

Please note: Any comments left when acknowledging the plan will be shared with your supervisor.

Definitions

Supervisor Reviews Comments from Employee Acknowledgement

Supervisors should click the approvals/acknowledgements to review the employee comments and initiate conversation with their employees as needed.

The screenshot shows a web browser window displaying a performance review page. The browser's address bar shows the URL: <https://employment.plu.edu/portal/performance/reviews/118/acknowledgements>. The page header includes the PLU logo, navigation links for Home and Performance, and a user profile for Gretchen Howell. The main content area is titled "2015 Annual Review Pilot Group 2" and displays review details: Evaluation Type: Anniversary, Program Timeframe: 01/01/15 to -, Review Status: Open, Last Updated: July 21, 2015 12:05, and Last Completed Step: Employee Acknowledges Plan. Below this, a section titled "Approvals & Acknowledgements" contains a table with one entry: "Employee Acknowledges Plan" with no comment given, acknowledged by Christine Nicolai on 07/21/15 at 12:05:12 PM. A left sidebar provides navigation options for the supervisor, Christine Nicolai, including Overview, Plan, Supervisor Evaluation, Self Evaluation, Progress Notes, Approvals & Acknowledgements, History, My Reviews, and My Employees' Reviews.

PLU

Home Performance

Go to PLU - HR Suite **PeopleAdmin**

Hello, **Gretchen** Log Out

Help for this page

Christine Nicolai

Supervisor
Gretchen Howell
Department
Human Resources

2015 Annual Review Pilot Group 2

Evaluation Type: Anniversary
Program Timeframe: 01/01/15 to -

Review Status: **Open**
Last Updated: July 21, 2015 12:05
Last Completed Step: Employee Acknowledges Plan

Approvals & Acknowledgements

Name	Comments	Decision	Completed By	Completed On
Employee Acknowledges Plan	No comment given	Acknowledge	Christine Nicolai	07/21/15 12:05:12 PM

Overview

Plan

Supervisor Evaluation

Self Evaluation

Progress Notes

Approvals & Acknowledgements

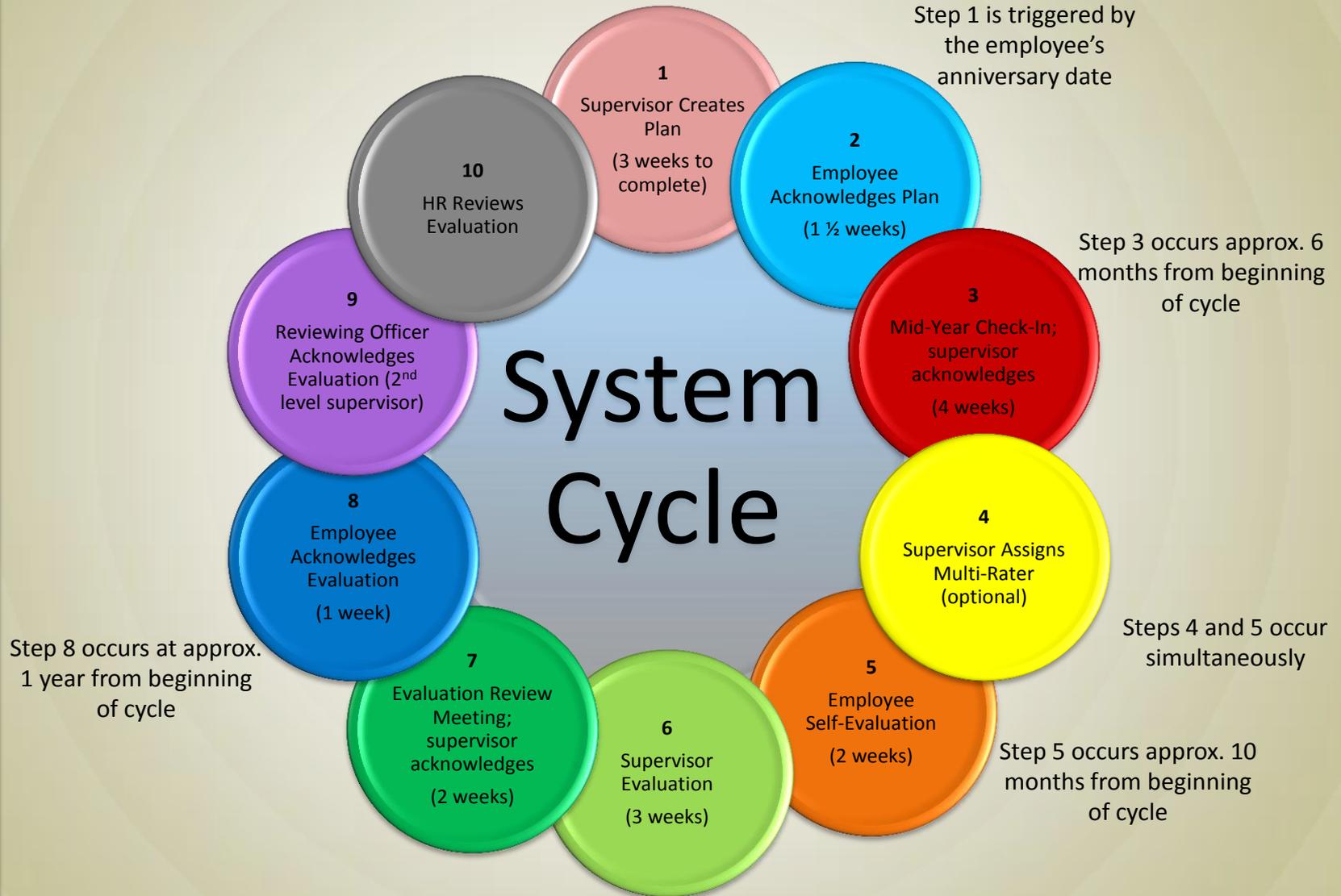
History

My Reviews

My Employees' Reviews

3:21 PM

Performance Management



The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the left side, there is a vertical bar consisting of a thin black line followed by a wider orange line.

MID-YEAR CHECK-IN

Mid-Year Check-In

Supervisors and employees meet halfway through the review cycle to check-in and review progress. If needed, the supervisor can adjust the plan.

- Supervisor meets with their employee
- Supervisor should go to “home” on the top of the page to see what tasks are due
- Click on “Mid-year check-in”
- After the meeting, supervisor click “complete”

The screenshot shows the PLU PeopleAdmin Employee Portal. The user is Teri Phillips. The page displays a 'Your Action Items' table with the following data:

Item	Description	Due Date	Status	Action
Multi-Rater Test 2 for Laura Fuhrman	Supervisor Creates Plan	n/a	Available	View
Multi-Rater Test 2 for Cathy Alswager	Multi Rater Feedback	n/a	Available	View
Multi-Rater Test 3 for Cathy Alswager	Multi Rater Feedback	n/a	Available	View
Multi-Rater Test 3 for Laura Fuhrman	Mid-Year Check-in	n/a	Available	View

Mid-Year Check-In

- Supervisor may want to update the plan post mid-year check-in
- Any changes to a plan should be communicated to the employee as soon as possible
- Progress notes can be entered at any time during the year

The screenshot shows a web browser window displaying the PLU PeopleAdmin performance management system. The browser address bar shows the URL: <https://plu-sb.peopleadmin.com/portal/performance/tasks/383>. The page header includes the PLU logo, navigation links for Home and Performance, and user information for Teri Phillips. The main content area is titled "Multi-Rater Test 3" and displays the following details:

Evaluation Type:	Focal	Review Status:	Open
Program Timeframe:	07/15/15 to -	Last Updated:	September 21, 2015 15:41
Co-reviewer:	Add Co-reviewer	Last Completed Step:	Employee Acknowledges Plan

Below the details, there is a section titled "Mid-Year Check-In" with the following text:

The mid-year check-in is a simple task to complete. Simply meet with your employee and discuss how you both believe the employee is performing to date. You may want to mention areas where you see improvement is needed for the rest of the review period or specific areas where the employee is performing well. <p> You may also want to take notes from this meeting in the "Progress Notes" tab. These progress notes are confidential to you and are meant to assist you in evaluating your employee at the end of the review period. Progress notes will be available to you at the end of the period to help you remember specific details in support of your ratings and feedback.

At the bottom right of the section, there is a blue button labeled "Complete".

The left sidebar contains a navigation menu with the following items:

- Overview
- Plan
- Supervisor Evaluation
- Self Evaluation
- Multi-rater Feedback
- Progress Notes
- Approvals & Acknowledgements
- History
- My Reviews
- My Employees' Reviews
- My Multi Rater Feedback

The Windows taskbar at the bottom shows the system clock as 3:43 PM.

SUPERVISOR ASSIGNS MULTI-RATER
(OPTIONAL)

Supervisor Assigns Multi-Rater

- This is an optional step
- Multi-Raters will only provide narrative comments; not competency ratings
- Supervisor needs to carefully consider if a Multi-Rater is appropriate

IF YES:

- Supervisor informs the employee of choice of Multi-Rater(s) during the mid-year check-in
- Supervisor assigns Multi-Rater(s) in system
- Multi-Rater(s) should receive email notification to provide Multi-Rater feedback

The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the far left, there is a vertical bar consisting of a thin black line followed by a wider orange bar.

**EMPLOYEE COMPLETES
SELF-EVALUATION**

Employee Self-Evaluation

- The criteria established in the plan carries over into the Self-Evaluation
- Employee can access self-evaluation under the “home” button under “your action items”
- Or, employee can click on “My Reviews”, then click “Self-Evaluation”

The screenshot shows a web browser window with the URL <https://plu-sb.peopleadmin.com/portal>. The page features a green header with the PLU logo and navigation links for 'Home', 'Performance', 'Hello, Laura', 'My Account', and 'Log Out'. A left sidebar contains a 'Performance' menu with 'My Reviews' and 'My Multi Rater Feedback' options. The main content area displays a 'Welcome to the Employee Portal, Laura Fuhrman' message and a 'Your Action Items' section. This section contains a table with the following data:

Item	Description	Due Date	Status	Action
Multi-Rater Test 3 for Laura Fuhrman	Employee Self-Evaluation	n/a	Available	View

Employee Self-Evaluation

Employees are encouraged to provide narrative comments for any of the below items:

- Competencies, Action Plan/Goals, Career Development, Overall Performance
- Comments aren't required, but may be very helpful to the supervisor in completing their evaluation

****It is important to complete all tabs before submitting the self-evaluation to your supervisor.****

Once complete, the employee should click "complete."

The screenshot shows a web browser window displaying the PLU PeopleAdmin Self-Evaluation portal. The browser address bar shows the URL: <https://plu-sb.peopleadmin.com/portal/performance/reviews/42/evaluations/87>. The page header includes the supervisor's name, Teri Phillips, and the department, Pacific Lutheran University. The evaluation type is Focal, the program timeframe is 07/15/15 to - , and the review status is Open. The last updated date is September 21, 2015 16:04, and the last completed step is Mid-Year Check-In. The main content area is titled "Self Evaluation for Laura Fuhrman" and contains instructions for completing the self-evaluation. The "Action Plan/Goals" tab is selected, and the page displays the "Action Plan/Goal Name:" field with the text "Test" and the "Goal Description:" field with the text "test desc". A "Comments" field is also visible at the bottom of the page.

Supervisor
Teri Phillips
Department
Pacific Lutheran University

Evaluation Type: Focal
Program Timeframe: 07/15/15 to -
Co-reviewer: N/A

Review Status: **Open**
Last Updated: September 21, 2015 16:04
Last Completed Step: Mid-Year Check-In

Self Evaluation for Laura Fuhrman

It is now time to complete your annual self-evaluation. As you evaluate your own performance, please reflect on how your actual performance compares with what is expected of you. You may want to refer to any progress notes you have taken along the way.

As you review the details below, provide a self-assessment and comment on each element as you see appropriate. Remember that you may want to refer to your progress notes (if you kept any during the review period) by clicking on the "Progress Notes" tab.

Introduction Core Competencies **Action Plan/Goals** Career Development/Plan Overall Performance Attachments

Action Plan/Goals

The purpose of this section is to document and track progress towards action plans/goals.

Action Plan/Goal Name:
Test

Goal Description:
test desc

Comments

SUPERVISOR COMPLETES EVALUATION

Supervisor Tools

- Established Plan
- Employee Self-Evaluation
- Progress Notes (if applicable)
- Multi-Rater Feedback (if applicable)

Supervisor Review

Performance Ratings and Definitions for Core Competencies

Above Standard is defined as the following: Performance is above and beyond expectations and exceeds established goals and competencies. Dependable in accomplishing job assignments and rarely makes errors.

Turns in peak performance.

Meets Standard is defined as the following: Generally meets job standards in both quality and quantity. Work is generally accurate; errors are few and seldom repeated. Generally dependable in accomplishing job assignments. Opportunities may exist to improve performance in core responsibilities or annual goals.

Below Standard is defined as the following: Overall work inconsistently meets minimum job standards for quality and quantity. Requires additional counseling, training, experience, or initiative to meet standards in some/all areas of responsibility and/or has not responded appropriately to areas identified for improvement. May require more than normal supervisory direction and follow-up.

The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the far left, there is a vertical bar consisting of a thin black line and a wider orange line.

EVALUATION REVIEW MEETING

Evaluation Review Meeting

- Supervisor should click on the “home” section on the menu bar across the top of the page to see what tasks are due
- Supervisor should meet in person with their employee and discuss the performance evaluation – there should be NO SURPRISES
- After the meeting , Supervisor should click on “Employee-Supervisor Evaluation Review Meeting” and click “complete”

The screenshot displays the PLU PeopleAdmin portal. The browser address bar shows the URL <https://plu-sb.peopleadmin.com/portal>. The page header includes the PLU logo, navigation links for Home and Performance, and user information for Teri Phillips, including My Account and Log Out options. A sidebar menu under 'Performance' lists My Reviews, My Employees' Reviews, and My Multi Rater Feedback. The main content area features a 'Welcome to the Employee Portal, Teri Phillips' message and a 'Your Action Items' section. This section contains a table with five rows of action items, each with a 'View' button.

Item	Description	Due Date	Status	Action
Multi-Rater Test 2 for Laura Fuhrman	Supervisor Creates Plan	n/a	Available	View
Multi-Rater Test 2 for Cathy Alswager	Multi Rater Feedback	n/a	Available	View
Multi-Rater Test 3 for Cathy Alswager	Multi Rater Feedback	n/a	Available	View
Multi-Rater Test 3 for Laura Fuhrman	Select Minimum Multiraters (Optional)	n/a	Available	View
Multi-Rater Test for Gretchen Howell	Employee-Supervisor Evaluation Review Meeting	n/a	Available	View

The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. A vertical orange bar is positioned on the left side, adjacent to a black border.

EMPLOYEE ACKNOWLEDGES EVALUATION

Employee Acknowledges Evaluation

- Employee can click on the “home” button, under “your action items”, and find the acknowledgement which is due
- Or, employee can click on the Acknowledgement Icon (clipboard) or “Acknowledgements” on the left-hand column
- Employee should read through the supervisor evaluation to ensure it captures the performance discussion
- Once the employee has read through the evaluation, employee should click “acknowledge”

The screenshot shows the PLU PeopleAdmin Employee Portal. The page title is "Welcome to the Employee Portal, Gretchen Howell". Under the "Your Action Items" section, there is a table with the following data:

Item	Description	Due Date	Status	Action
Multi-Rater Test 2 for Christine Nicolai	Supervisor Creates Plan	n/a	Available	View
Multi-Rater Test for Gretchen Howell	Employee Acknowledges Evaluation	n/a	Available	View

The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the far left, there is a vertical bar consisting of a thin black line followed by a wider orange bar.

REVIEWING OFFICER ACKNOWLEDGES EVALUATION

Reviewing Officer Acknowledges Evaluation

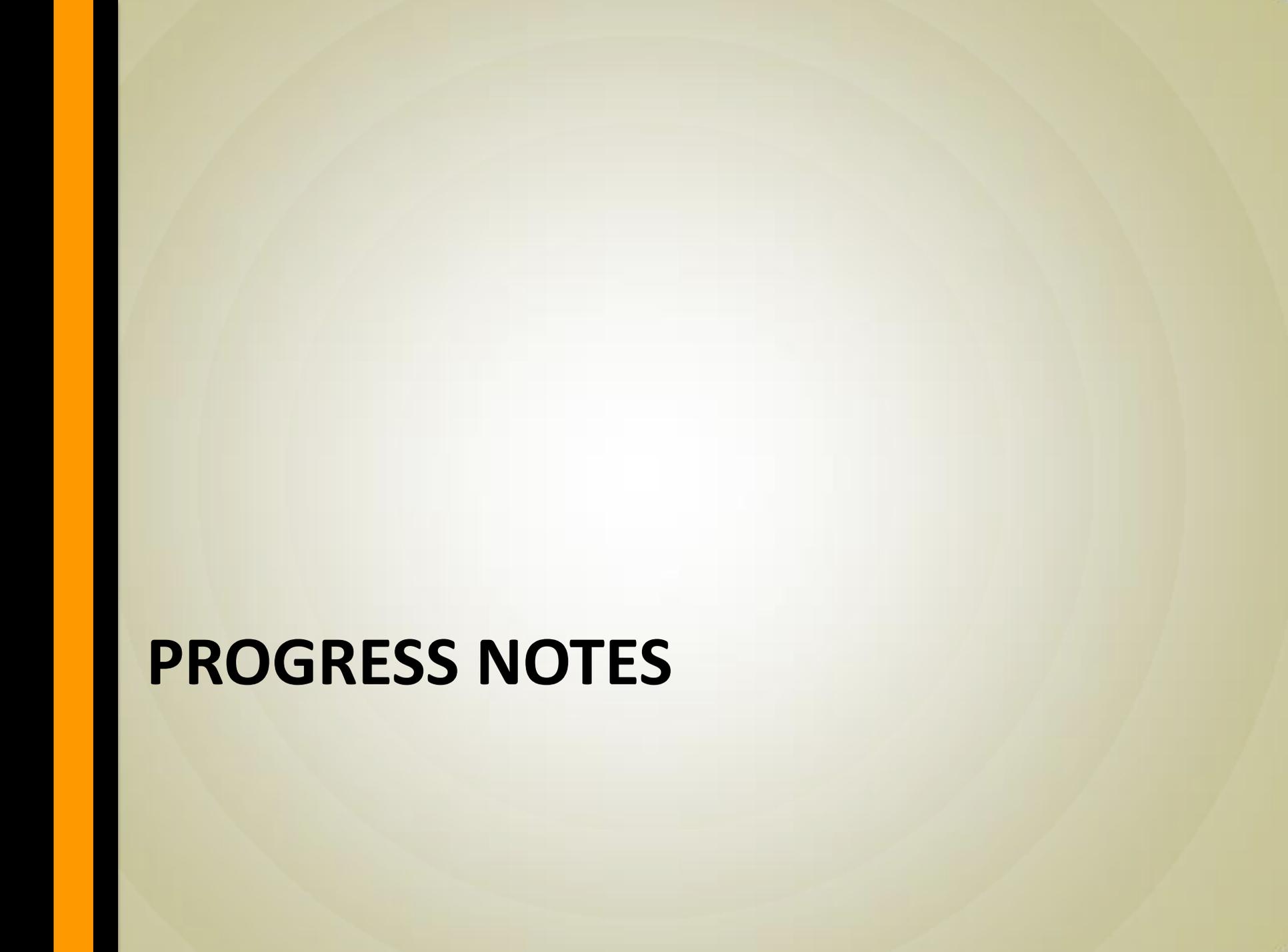
- Reviewing Officer is the 2nd level supervisor
- Reviewing Officer should read through the performance evaluation and may include comments
- Once having approved the review, the Reviewing Officer clicks “acknowledge”

The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the far left, there is a vertical bar consisting of a thin black line followed by a wider orange bar.

HUMAN RESOURCES ACKNOWLEDGES EVALUATION

Human Resources Acknowledges Evaluation

- Human Resources reviews each completed performance evaluation.
- Performance concerns should be addressed with the employee as soon as possible; however, Human Resources will follow up with supervisors regarding any performance concerns.
- Once Human Resources has reviewed the performance evaluation, a hardcopy will be put in the employee's personnel file.

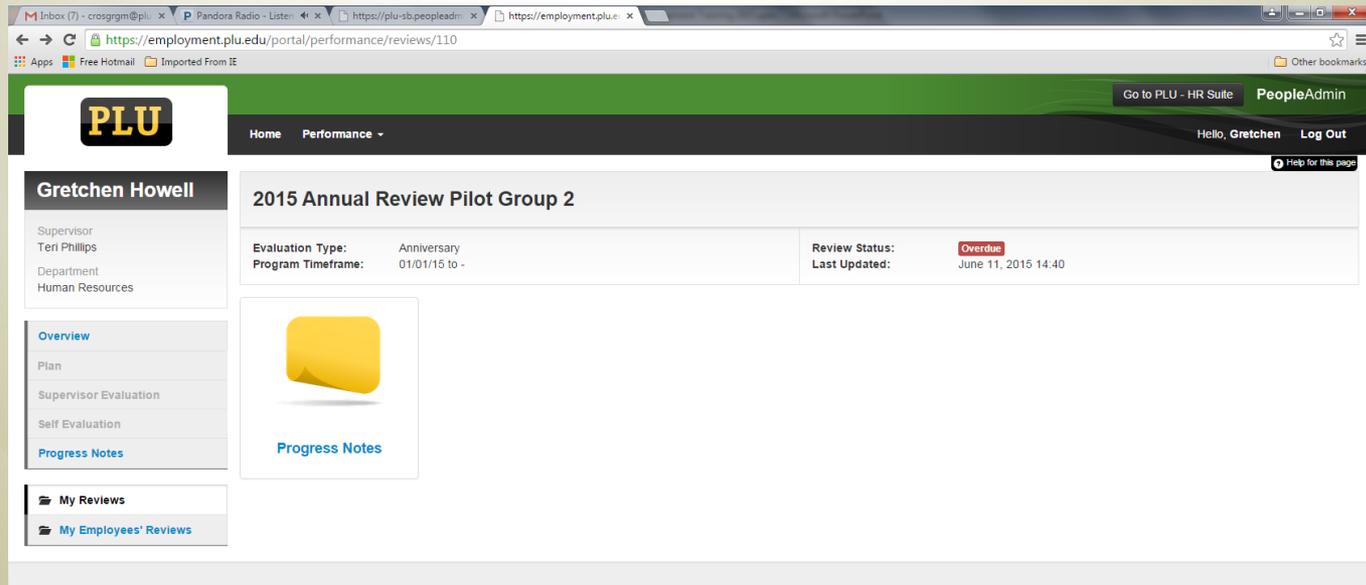
The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the far left, there is a vertical bar consisting of a thin black line followed by a wider orange line.

PROGRESS NOTES

Progress Notes

- This feature allows you to capture progress notes in the system throughout the review period.
- Available for supervisors and employees.
- Supervisors and employees will not see each others' notes (private to the user).
- Have access to progress notes throughout the performance management cycle.
- Progress notes can be accessed by clicking on the yellow progress notes icon or “progress notes” on the left-hand column

****Tip – complete progress notes periodically to ensure an easy review documentation process**



The screenshot displays the PLU PeopleAdmin HR Suite interface. The browser address bar shows the URL: <https://employment.plu.edu/portal/performance/reviews/110>. The page header includes the PLU logo, navigation links for Home and Performance, and a user greeting: Hello, Gretchen Log Out. The main content area is titled "2015 Annual Review Pilot Group 2" and displays the following information:

Supervisor Teri Phillips Department Human Resources	Evaluation Type: Anniversary Program Timeframe: 01/01/15 to -	Review Status: Overdue Last Updated: June 11, 2015 14:40
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Below the information, there is a yellow sticky note icon labeled "Progress Notes". The left-hand navigation menu includes: Overview, Plan, Supervisor Evaluation, Self Evaluation, Progress Notes, My Reviews, and My Employees' Reviews.

Progress Notes

The screenshot shows a web browser window with the following elements:

- Browser Tabs:** Includes 'Inbox (7) - crosgrgm@plu...', 'Pandora Radio - Listen...', 'https://plu-sb.peopleadm...', and 'https://employment.plu.edu...'.
- Address Bar:** Displays the URL 'https://employment.plu.edu/portal/performance/reviews/110/progress_notes'.
- Page Header:** Features the PLU logo on the left, 'Home Performance' navigation, 'Go to PLU - HR Suite' and 'PeopleAdmin' links, and a user greeting 'Hello, Gretchen Log Out'.
- Sidebar:** Contains the user name 'Gretchen Howell', her role 'Supervisor Teri Phillips', and department 'Human Resources'. It also has a menu with 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Progress Notes', 'My Reviews', and 'My Employees' Reviews'.
- Main Content Area:**
 - Title:** '2015 Annual Review Pilot Group 2'
 - Evaluation Details:** Evaluation Type: Anniversary; Program Timeframe: 01/01/15 to -; Review Status: **Overdue**; Last Updated: June 11, 2015 14:40.
 - Form Section:** Titled 'Progress Notes' with a 'New Progress Note' button. It contains a 'Title (Optional)' text box, a '* Note' text area, an 'Add attachment' button, and a 'Save' button.

Progress Notes

You can attach these types of documents:

- Microsoft® Word® or similar word-processing (.doc, .docx, .rtf, .rtx)
- PDF
- Plain text, such as from Notepad (.txt)
- Microsoft Excel® (.xls, .xlsx)
- Graphics (.tiff, .tif, .jpeg, .jpg, .jpe, .png)

If you attach a document it is converted to .pdf format.

Documents may take some time to convert.

The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the far left, there is a vertical bar consisting of a thin black line and a wider orange line.

EMPLOYEE LEAVE

What if my Employee is on Leave?

- Try to complete any open tasks early, prior to their leave
- If not able, tasks will show as “overdue” in the system
- “Overdue” tasks can be caught up upon their return, if within the review cycle
- If the end of the annual review cycle is near, the supervisor should complete the performance review and the employee should sign a hard-copy when back from leave

The background features a series of concentric, semi-transparent circles in shades of light green and yellow, centered on the page. On the far left, there is a vertical bar consisting of a thin black line followed by a wider orange line.

USER TIPS

User Tips

Time Investment:

- Awareness
- Calendar time to complete the steps throughout the year

Saving Content:

- Save often and before stepping away from your computer

Timing Out:

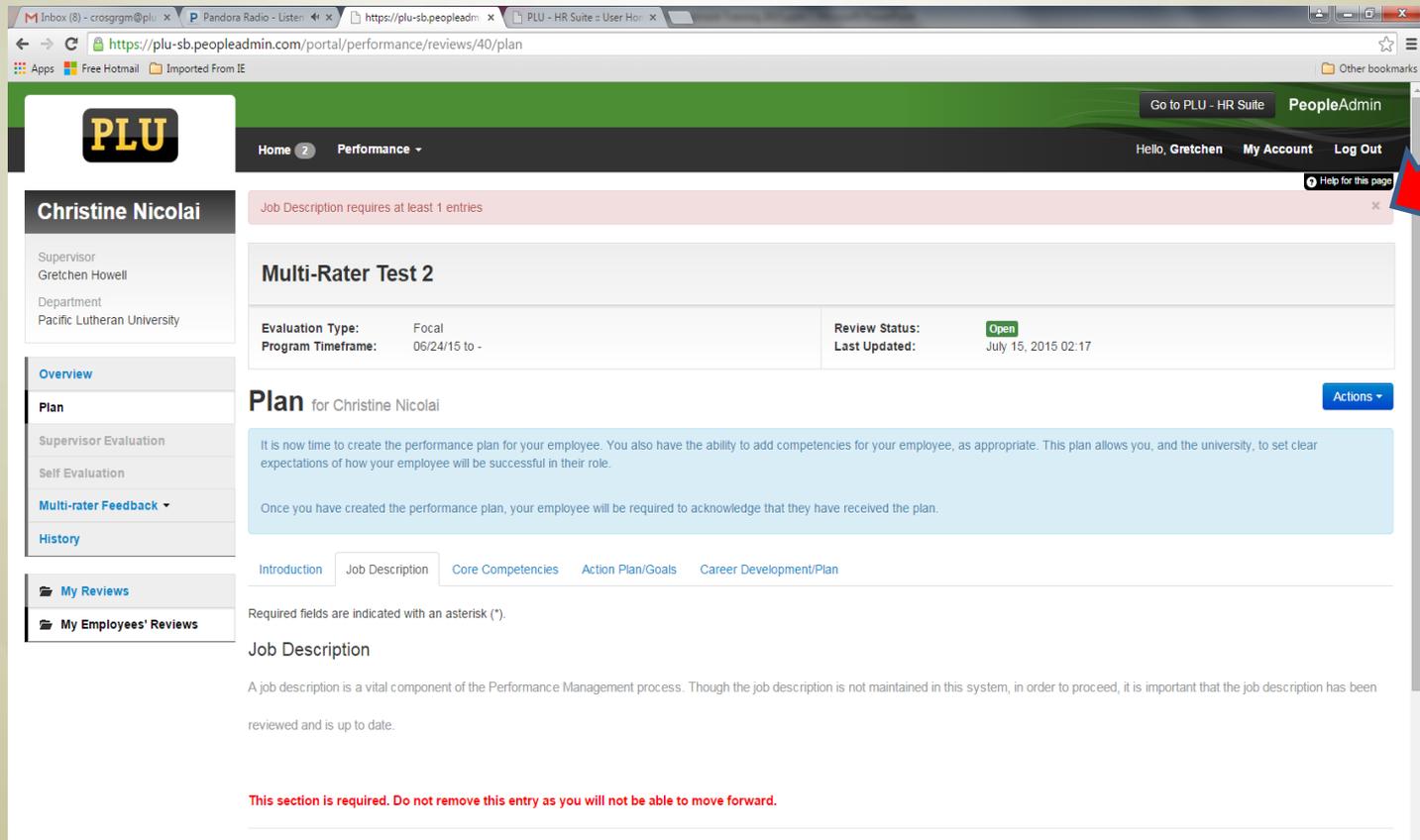
- System times out after 60 minutes of inactivity

Dual Screens:

- If you have two monitors, able to open system twice to view information

Making a Mistake

- If you make a mistake the system will alert you with a box at the top of the screen with text in **RED**
- Fixing the mistake
 - Go to the area that is mentioned in the error box
 - Redo/complete the section with the error



The screenshot shows a web browser window displaying the PLU PeopleAdmin interface. The browser's address bar shows the URL: <https://plu-sb.peopleadmin.com/portal/performance/reviews/40/plan>. The page header includes the PLU logo, navigation links for Home and Performance, and user information for Gretchen. A red error message box at the top of the page reads: "Job Description requires at least 1 entries". A red arrow points to this error message. Below the error message, the page displays details for a "Multi-Rater Test 2" for Christine Nicolai, including evaluation type (Focal), program timeframe (06/24/15 to -), review status (Open), and last updated date (July 15, 2015 02:17). The main content area is titled "Plan for Christine Nicolai" and contains instructions for creating a performance plan. At the bottom of the page, a red error message states: "This section is required. Do not remove this entry as you will not be able to move forward."

Email Notifications

- System generated email reminders will be sent throughout the performance management cycle
- Provide notification of upcoming tasks to be completed, as well as when a task is overdue and requiring attention
- Email notifications will be in a short snippets meant to encourage action

Sample - Reminder Emails

From: humr@plu.edu

Date: Mon, Jul 13, 2015 at 12:45 AM

To: crosgrgm@plu.edu

Subject: Your Performance Management Action Items - 2015 Annual Review Pilot Group 2

Hello Gretchen Howell,

There are Performance Management Action Items that need your attention.

Action Item Coming Due – 1

You have at least one action item coming due within the next 7 days.

Mid-Year Check-In (Due 07/20/2015)

[View your Action item in the Employee Portal »](#)

Please log into the Employee Portal and complete your action items. Contact HR if you have any questions.

Questions?



Human Resources

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