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
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 System Cycle

1. Supervisor Creates Plan (3 weeks to complete)
2. Employee Acknowledges Plan (1 ½ weeks)
3. Mid-Year Check-In; supervisor acknowledges (4 weeks)
4. Supervisor Assigns Multi-Rater (optional)
5. Employee Self-Evaluation (2 weeks)
6. Supervisor Evaluation (3 weeks)
7. Evaluation Review Meeting; supervisor acknowledges (1 week)
8. Employee Acknowledges Evaluation (2 months)
9. Reviewing Officer Acknowledges Evaluation (2nd level supervisor)
10. HR Reviews Evaluation
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 – 2\textsuperscript{nd} 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.
Logging In & Home Page

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

Default Home Page

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

<table>
<thead>
<tr>
<th>Item Details</th>
<th>Action Items</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015 Annual Review Pilot Group 1 for Rebecca Farris</td>
<td>Supervisor Creates Plan</td>
<td>2015-01-23 Due 6 months ago</td>
<td>Override</td>
</tr>
<tr>
<td>2015 Annual Review Pilot Group 1 for Erica Pickens</td>
<td>Supervisor Creates Plan</td>
<td>2015-05-26 Due 2 months ago</td>
<td>Override</td>
</tr>
<tr>
<td>2015 Annual Review Pilot Group 1 for Valerie Seeley</td>
<td>Supervisor Creates Plan</td>
<td>2015-07-20 Due 16 days ago</td>
<td>Override</td>
</tr>
<tr>
<td>2015 Annual Review Pilot Group 1 for Thomas Harvey</td>
<td>Supervisor Creates Plan</td>
<td>2015-07-26 Due 11 days ago</td>
<td>Override</td>
</tr>
<tr>
<td>2015 Annual Review Pilot Group 1 for Jennifer Stolz</td>
<td>Supervisor Creates Plan</td>
<td>2015-08-12 Due in 7 days</td>
<td>Update</td>
</tr>
</tbody>
</table>
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10. HR Reviews Evaluation

Step 1 is triggered by the employee’s anniversary date.
Step 3 occurs approx. 6 months from beginning of cycle.
Steps 4 and 5 occur simultaneously.
Step 5 occurs approx. 10 months from beginning of cycle.
Step 8 occurs at approx. 1 year from beginning of cycle.
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
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
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”
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”
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
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.
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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”
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
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
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”
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.”
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.
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.”
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”
REVIEWSING OFFICER ACKNOWLEDGES EVALUATION
Reviewing Officer Acknowledges Evaluation

• Reviewing Officer is the 2\textsuperscript{nd} level supervisor

• Reviewing Officer should read through the performance evaluation and may include comments

• Once having approved the review, the Reviewing Officer clicks “acknowledge”
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.
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**
2015 Annual Review Pilot Group 2

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

Progress Notes

Title (Optional)

Note

Add attachment

Save
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.
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
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
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.
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
253-535-7185
humr@plu.edu