

Completing a Classified Performance Evaluation in PeopleAdmin 7

The Employee Portal...houses all things performance-related!

- Log-into PeopleAdmin 7 and click on **Go to Employee Portal** in the upper right or log directly into your portal: <https://jobs.uark.edu/portal>
- Performance action items should be visible on this first page under **Your Action Items**.
- PeopleAdmin 7 generates emails to alert you when you have an action item due. These emails are generated and sent overnight – the Action Item may be available and visible in your portal prior to you receiving the email.
- Performance Programs for 2015-2016 are for evaluations that are due during the calendar year 2016; Performance Programs for 2016-2017 are for evaluations that are due during the calendar year 2017.
- **Standard-Based Performance Programs** – the Supervisor's Supervisor is the Evaluation Approver; **College-Based Performance Programs** – one person is designated to approve evaluation for the entire college/department.

Sidebar Navigation in the Employee Portal:

- Supervisors and employees can access Performance Programs for themselves and/or their employees through the sidebar. Edits may not be possible due to the fact that the item is awaiting approval or acknowledgement from someone else.
- Sidebar navigation can be used to determine whose portal the Performance Standards or the Performance Evaluation may be in as an Action Item by accessing the **History** tab.
- Supervisors and employees can utilize Progress Notes and Attachments to keep notes on performance throughout the year.
- You can use sidebar navigation to check supervisor alignments and make sure all of the classified employees that you supervise are in the correct performance program.

Developing/Acknowledging Performance Standards:

SUPERVISOR'S PORTAL: Action Item will be: **"As the Supervisor/Co-Reviewer, it is time to develop the performance standards for this employee's review cycle."**

- Click on **Position Details** tab and complete all required fields using the Position Description.
 - For merit eligibility date, please put month and year only.
 - Review cycle dates begin with the merit date and end the day prior the following year.
- Click on **Job Duties** tab and review.
 - These should feed over from the Position Description. To make changes to the Job Duties, you would need to modify the Position Description. If modifications are made to the Position Description, you will need to refresh the Job Duties at the top right of tab.
- Click on **Self-Management Standards** tab and complete.
 - Cut and paste any of the examples listed or enter your own.
- Click on **Support of University Goals/Initiatives Standards** tab and complete.
 - Cut and paste any of the examples listed or enter your own.
- Optional -- Click on **Goals and Professional Development** tab and complete.
- Select **Complete**. The standards are now in the employee's portal to acknowledge.

EMPLOYEE'S PORTAL: Action Item will be: **"As the employee, it is time to acknowledge the performance standards for this review cycle."**

- Review standards and select **Acknowledge**. The standards are now in the Evaluation Approver's portal to acknowledge/approve.

EVALUATION APPROVER'S PORTAL: Action Item will be: **"The supervisor has completed the standards and the employee has acknowledged those standards. As the Evaluation Approver, review the standards to ensure they are appropriate for the position."**

- To request revisions to the standards: If revisions are needed do NOT hit **Acknowledge**. The Evaluation Approver needs to notify the Supervisor and discuss needed revisions. The Supervisor can make revisions using sidebar navigation, and these revisions will be visible to the Evaluation Approver prior to hitting **Acknowledge**. If revisions are made, the Employee will be automatically notified to re-acknowledge the Standards.
 - To approve the standards: Review the standards and select **Acknowledge** to approve the standards.
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Completing the Performance Evaluation:

SUPERVISOR'S PORTAL: Action Item will be: **“Initiate Evaluation Process (WARNING standards will not be editable past this point).”** Edits to the standards must be made (using sidebar navigation) before selecting **Complete**. Once **Complete** is selected, the standards will be locked.

- If Standards are finalized and the Supervisor is ready to begin the Evaluation, open and select **Complete**.
- After the Supervisor has hit complete to initiate the evaluation process, the following Action Items will open up:
 - **“As the Supervisor/Co-Reviewer, it is time to draft the performance evaluation for this employee’s review cycle.”**
 - Optional – **Initiate request for a self-evaluation.**
 - Optional – **Invite Peers to complete a peer review (Multi-Rater Feedback).**
- Click on the Action Item to draft the evaluation.
 - Review the Performance Review Policy and select **Next**.
 - Complete the Rating Cycle question – if it is a final evaluation, enter an end of employment date.
 - Complete all required fields under **Job Duties**. You can adjust the percentage of time on each Job Duty, if desired, but all Job Duties combined must equal 100%.
 - Complete all required fields under **Self-Management** (enter 20 as the weight).
 - Complete all required fields under **Support of University Goals/Initiatives** (enter 10 as the weight).
 - Optional – complete Feedback on **Goals and Professional Development**.
 - Under **Eligibility for Merit Pay**, complete the **Written Reprimand** section. If employee received a written reprimand, include the date, and upload the reprimand as an attachment in the Attachments tab.
 - Select **Complete**. The Evaluation is now in the Evaluation Approver’s portal to approve/acknowledge. No changes can be made to the evaluation at this point unless the Evaluation Approver returns it for revisions.

EVALUATION APPROVER'S PORTAL: Action Item will be: **“As the Evaluation Approver, it is time to review/approve the performance evaluation for this employee’s review cycle.”**

- Review the performance evaluation, and select either **“Approve”** or **“Return”**. If returning, comments are required and the Supervisor should be notified that the evaluation has been returned. The Supervisor can only make revisions at the point if the performance evaluation is returned.
- Once approved, the performance evaluation will be in the Supervisor’s portal to discuss with the Employee.

SUPERVISOR'S PORTAL: Action Item will be: **“As the Supervisor/Co-Reviewer, it is time to discuss the performance evaluation with the employee for this review cycle.”**

- Supervisors must verbally discuss the evaluation with the employee prior to acknowledgement.
- Once this discussion has occurred, select **Acknowledge**. The evaluation is now in the employee’s portal to acknowledge and to add optional comments.

EMPLOYEE'S PORTAL: Action Item will be: **“As the employee, it’s time to acknowledge receipt of the performance evaluation. You will have the option to acknowledge and provide comments.”**

- Review the evaluation and add comments, if desired. Select **Acknowledge**. The performance evaluation is in the Supervisor’s portal to review and acknowledge any comments.

SUPERVISOR'S PORTAL: Action Item will be: **“The employee has reviewed the performance evaluation. As the Supervisor/Co-Reviewer, it is time to review the comments and acknowledgement from the employee.”**

- Click on the Action Item and use sidebar navigation to select **Approvals and Acknowledgements** – review comments column. Select **Home** and open the Action Item again and select **Complete**. The evaluation is now in the Evaluation Approver’s portal to review/acknowledge comments.

EVALUATION APPROVER'S PORTAL: Action Item will be: **“The employee has reviewed the performance evaluation. As the Evaluation Approver, it is time to review the comments and acknowledgement from the employee.”**

- Click on the Action Item and use sidebar navigation to select **Approvals and Acknowledgements** – review comments column. Select **Home** and open the Action Item again and select **Complete**.
- The evaluation has now been submitted to University HR for processing!

Classified Performance Review Cycle

Performance Standards (beginning of review cycle):

The **Supervisor** develops the Performance Standards.

The **Employee** acknowledges the Performance Standards.

The **Evaluation Approver** approves the Performance Standards

The **Supervisor** initiates the evaluation process which locks the Performance Standards.

Performance Evaluation (end of review cycle):

Optional – The **Supervisor** initiates the request for a Self-Evaluation.

Optional – The **Supervisor** initiates the request for peer/multi-rater reviews.

The **Supervisor** drafts the Performance Evaluation.

The **Evaluation Approver** approves the Performance Evaluation.

The **Supervisor** discusses the Performance Evaluation with the Employee.

The **Employee** acknowledges the Performance Evaluation and provides optional feedback/comments.

The **Supervisor** reviews feedback/comments from the Employee.

The **Evaluation Approver** reviews feedback/comments from the Employee.

University HR collects and finalizes the Performance Evaluation.