PeopleAdmin Mini-Manual

Supervisor Online Performance Review

See the <u>University of Vermont Performance Review Process</u> for additional details including the purpose of Performance Reviews and an overview of the performance review process. Contact your supervisor or Human Resource Services(HRS) at <u>HRSinfo@uvm.edu</u> or 802-656-3108 with any questions.

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Alternative Video Guides

- [Step by Step Supervisor Video: Using the Online Form](#)
- [Step by Step Supervisor Video: Uploading a Paper Form](#)

Overview of Online Annual Performance Review Process
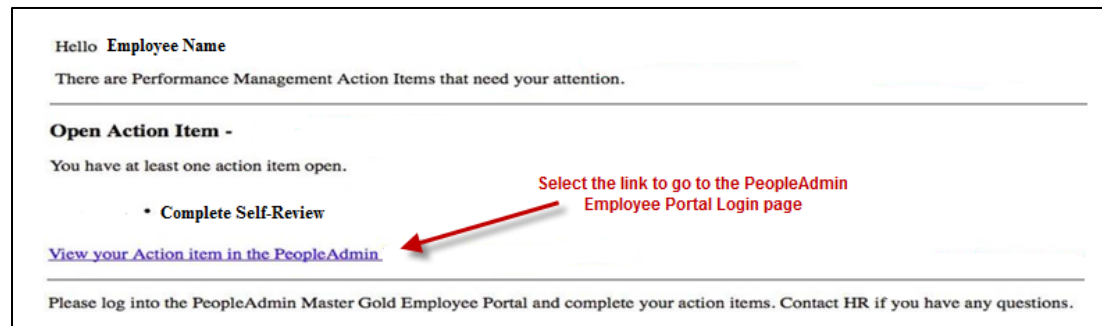
1. Supervisor completes the Performance Review Plan (Step 1)
2. Employee completes Self-Review (Step 2)
3. Supervisor completes the Supervisor Review (Step 3)
4. Review meeting occurs
5. As necessary, supervisor documents additional comments or revises the review, then approves the review
6. Employee acknowledges receipt of review
7. Supervisor acknowledges the review

![The University of Vermont logo] **PeopleAdmin Mini-Manual**

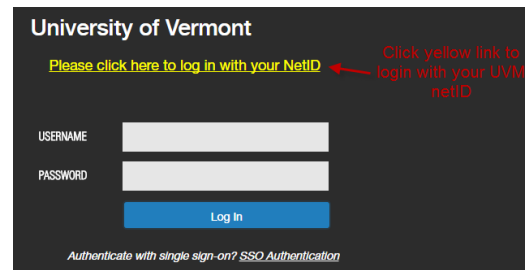## Accessing the PeopleAdmin Performance Module

Logging in via the Notification Email

1. Each year PeopleAdmin will create a task for you to complete an Online Performance Review for your direct report classified staff employees. When this occurs you will receive an email notifying you that you have an action item in PeopleAdmin Performance Management. When those action items are due or overdue you will receive additional notifications.

2. The link within the email will direct you to the Performance Management Employee Portal Login page. Emails will list an action for each employee.


Hello **Employee Name**

There are Performance Management Action Items that need your attention.

Open Action Item -

You have at least one action item open.

• **Complete Self-Review**

View your Action item in the PeopleAdmin

Select the link to go to the PeopleAdmin Employee Portal Login page

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

Logging in from PeopleAdmin Main Page:

1. Go to the PeopleAdmin Login Page.

2. Click the yellow link to login with your UVM netID. You will be required to login using multi-factor authentication (MFA). To set up your MFA, please see the ETS Knowledge Base page.

University of Vermont

Please click here to log in with your NetID

Click yellow link to login with your UVM netID

USERNAME

PASSWORD

Log In

Authenticate with single sign-on? SSO Authentication

Updated 1/6/2021

3. After logging in, you may need to select "Go to Employee Portal" after opening the menu in the upper left.

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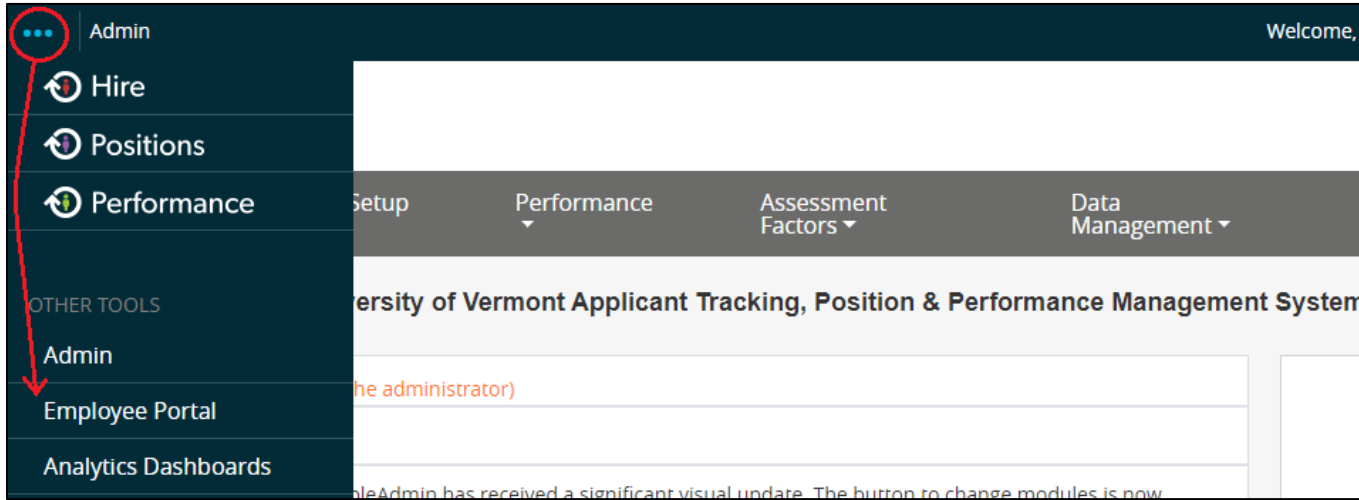
Launching the Performance Reviews

If you plan to upload paper reviews instead of completing them online, skip to the Uploading Paper Forms section

Initiating Performance Review Plan for your Employees

The purpose of the Performance Review Plan is to give you an opportunity to review the material that your employee will be evaluated on before you start the evaluation. This includes reviewing their PD and adding/editing goals from the previous year.

Completing the Performance Review Plan launches the review process.

1. Start by logging into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
2. Click on the Item name for the employee whose review you wish to initiate.
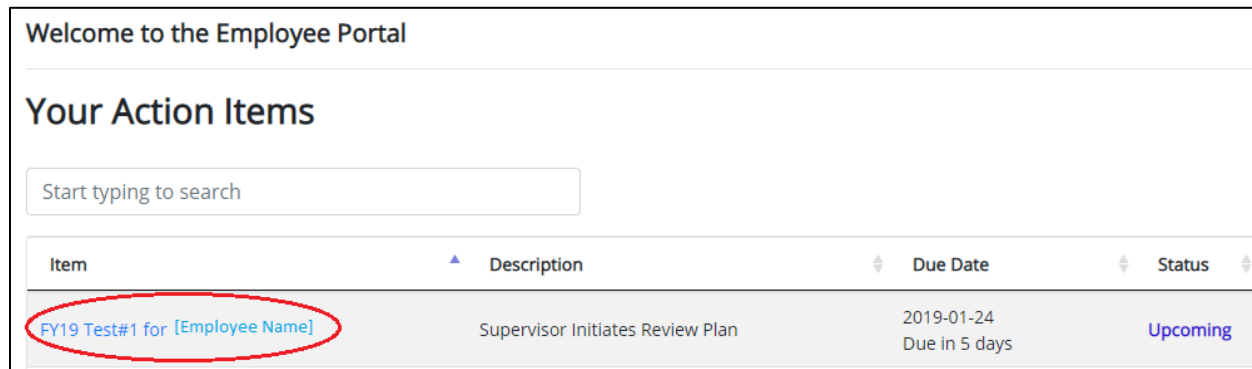
3. Review each tab and read the instructions on each tab carefully. Remember, the Plan is your opportunity to look at the contents of the review before it begins.
    a. The "Essential Functions" are pulled directly from the Position Description. If the essentials functions have been updated in the time since the review program was launched, you can click on the "Apply" button to refresh them. The "Goals, Objectives, and Accomplishments- Current Review Period" are pulled from the previous online Supervisor Review. If this is the first review completed Online in PeopleAdmin you will need to enter the goals, and objectives outlined in the last review for the employee.

Add a Co-reviewer

4. Add a Co-reviewer (using the "Add Co-Reviewer" button) if someone else will be conducting/updating the review.

Review Type:	Focal
Program Timeframe:	08/01/16 to -
Co-reviewer:	Add Co-reviewer 🗑

5. Use the "Complete" button at the bottom of the final tab to initiate the performance review for this employee. Or, use the "Actions" drop-down and choose "Complete".
    a. This will unlock the ability for you to start your Supervisor Review and for the Employee to start their Self-Review. **We advise that you have the employee complete their self-review before you begin your Supervisor Review.**

Viewing Your Employees' Self-Reviews

If you plan to upload paper reviews instead of completing them online, skip to the Uploading Paper Forms section**

1. Start by logging into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
2. Click on the Item name for the employee whose self-review you wish to look at:

Your Action Items

Start typing to search

Item ▲	Description	Due Date ⇕	Status ⇕
FY19 Test#1 for [Employee Name]	Supervisor Review	2019-01-24 Due in 5 days	Upcoming

3. On the left-hand side, click "Self Review (Step 2)".
4. Review the employee's self-review to help inform your supervisor review.
5. Click "Supervisor Review (Step 3)" when you are ready to start begin entering the supervisor review.

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Completing the Online Supervisor Review

If you plan to upload paper reviews instead of completing them online, skip to the Uploading Paper Forms **section**

1. Once you have reviewed your employee's self-review, log into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
   Note: Supervisors may enter information in the Online Supervisor review prior to the employee completing the self-review. However, once the supervisor marks the review as "Approved" the employee will be able to view the information entered. Use the "Save Draft" button to save information and the "Complete" button once all information has been prepared for the review meeting. Neither the "Save Draft" or "Complete" status will provide the employee with access to the review.

2. Click on the Item name for the employee whose review you wish to work on:

Your Action Items

Item	Description	Due Date	Status
FY19 Test#1 for [Employee Name]	Supervisor Review	2019-01-24 Due in 5 days	Upcoming

3. Navigate to "Supervisor Review (Step 3)".

- Overview
- Plan (Step 1)
- Supervisor Review (Step 3)
- Self Review (Step 2)
- History

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4. Go through each tab, making sure to <u>read the instructions on each tab carefully</u>.

Introduction	Information on best practices for performance reviews and criteria for determining level of performance.
Method of Review	Choose whether you will be uploading a paper performance review or completing the online review. [Uploading Paper Performance Review instructions]
Essential Functions	Rate the employee for each of the essential functions from their position description.
Core Competencies	Rate the employee for each of the UVM core competencies. The core competency marked as "supervisory" only need to be completed for employees with supervisory duties. We advise using the Performance Management Competency Tool to help guide your scoring.
Goals, Objectives, and Accomplishments – Current Review Period	An opportunity to look at the goals and objectives stated in the previous review and rate the degree to which they were accomplished.
Overall Summary of Performance	Summarize the employee's overall performance and give an overall rating.
Additional Comments	Add any additional comments not already entered into one of the previous tabs.
Future Goals and Objectives	List goals and objectives for the upcoming year. These will be pulled into next year's review.
Attachments	Attach any relevant documents.

Moving Between Tabs & Saving Information

1. Move Between Tabs
   - Select the "Next" button on the bottom of the page, or select the title of the tab you would like to navigate to. The "Future Goals and Objectives" tab will have a "Complete" button in place of the next button. If you would like to add an attachment navigate to the "Attachments Tab" by clicking the tab title at the top of the page.
     Note: Moving between tabs will not save information entered.
2. Save Draft
   - Click the "Save Draft" button at the bottom of each page or select the blue "Actions" drop down option at the top, right hand corner of the page. Then select "Save Draft". **Save often!**
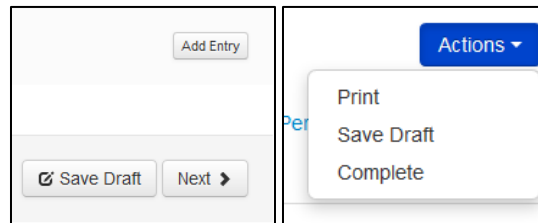
Adding Attachments

1. Navigate to the "Attachments" tab. Click the grey "Browse" button.
2. Use the file explorer to select the document you would like to upload to the review.
3. Click "Upload File".
4. Give the file a name in the "Name" field on the page.
5. To add an additional attachment, select the blue "New Attachment" button on the right.

Attachments

Introduction   Position Description & Review Meeting Discussion   Core Competencies   Goals, Objectives, and Accomplishments - Current Review Period   Overall Summary of Performance

Additional Comments   Future Goals and Objectives   Attachments

* Name		New Attachment
Description		

File   [Browse...]   No file selected.

[Upload file]

Submit/Complete the Supervisor Review

1. Ensure that you have completed all questions in each tab. (If your employee does not have supervisory responsibilities then do not complete that section of the Core Competencies.)
   Note: Employees will not be able to view the supervisor review until the review has been moved to approved status (the status where supervisors are unable to make additional edits to the review.)
   a. Completing with the Action Button: Use the "Actions" button in the upper right hand corner. Select the "Action" button then click "Complete."
   b. Completing on the "Future Goals & Objectives" tab: At the bottom of this tab the next button is replaced by a blue "Complete" button. Click this to complete the review.

Actions ▾
Print
Save Draft
Complete

Save Draft   Complete
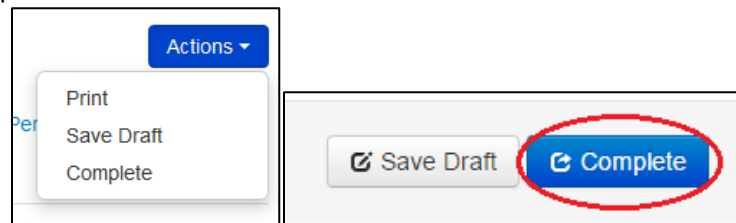
Conducting the Employee Review Meeting

1. Print a copy of the completed reviews by logging into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
2. Click on the Item name for the employee whose review you wish to print in preparation for the review meeting:

Your Action Items

Item	Description	Due Date	Status
FY19 Test#1 for [Employee Name]	Review Meeting/ Final Approval	2019-01-24 Due in 5 days	Upcoming

3. Navigate to "Supervisor Review (Step 3)".
4. Use the "Actions" drop-down menu in the upper right and choose "Print". (You can print to PDF to save paper.)
5. Navigate to "Self Review (Step 2)".
6. Use the "Actions" drop-down menu in the upper right and choose "Print". (You can print to PDF to save paper.)
7. Conduct your review meeting with the employee.
8. If your review meeting prompts edits to your Supervisor Review, follow the next set of steps.
9. If no edits are needed, skip to the Approving the Supervisor Review steps.

Actions ▾

Print
Return
Approve

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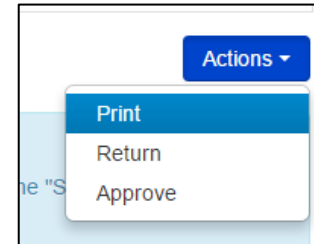
Editing/Revising the Supervisor Review

This is required if you need to edit your Supervisor Review after you have completed it. Often, Supervisors will want to make edits after the Performance Review Meeting.

> **Note:** Once the review has been approved by the supervisor additional edits cannot be made.
> **Note:** Once the review has been approved, the employee will be able to view and acknowledge the supervisor review.

1. Start by logging into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
2. Click on the Item name for the employee whose review you wish to revise:

Your Action Items

Item	Description	Due Date	Status
FY19 Test#1 for [Employee Name]	Review Meeting/ Final Approval	2019-01-24 Due in 5 days	Upcoming

3. Navigate to "Supervisor Review (Step 3)"

Overview
Plan (Step 1)
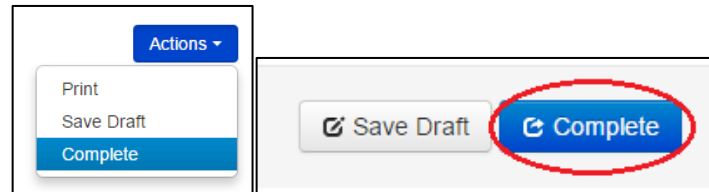Supervisor Review (Step 3)
Self Review (Step 2)
History

4. Scroll to the bottom and type a brief summary of the changes you need to make into the "Comment" box.
5. Click the "Return" button.

Comment

⟲ Return   ⟲ Approve

6. Navigate to "Supervisor Review (Step 3)" again.
7. Make the edits on whichever tab(s) have the fields you want to edit.
8. When you are finished editing your review, you need to mark is as "Complete" again. To do this, start by going back to the "Future Goals and Objectives" tab.
9. You can either use the "Actions" drop-down menu at the top and choose "Complete", or scroll to the bottom, click "Complete", and confirm.

Approving the Supervisor Review

1. Once you are sure that no more edits are needed to the Supervisor Review, you can approve it.
   Note: No changes can be made after the review has been approved. Approving the review is the same as saying it is ready for signatures.
2. Start by logging into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
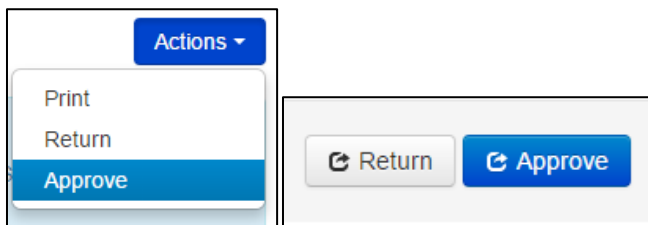3. Click on the Item name for the employee whose review you wish to approve:

4. Navigate to "Supervisor Review (Step 3)"
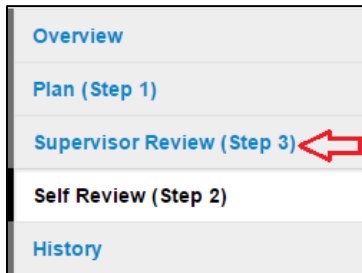
5. You can either use the "Actions" drop-down menu at the top and choose "Approve", Or scroll to the bottom, click "Approve", and confirm.

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Employee Acknowledgement of the Review

If you plan to upload paper reviews instead of completing them online, skip to the Uploading Paper Forms section**

1. Once the review has been approved by the supervisor, the employee needs to login and acknowledge the review before it is complete.
   - The employee will be acknowledging the receipt of the approved review. They will not be acknowledging whether they agree or disagree with the supervisor's assessment.
   - The employee may include comments along with their acknowledgement.
   - See instructions in the Employee Performance Review Mini Manual for additional details.
   - The supervisor may complete the supervisor acknowledgement BEFORE the employee acknowledgement ONLY if they employee has signed the paper review form uploaded by the supervisor OR if the employee refuses to acknowledge the review.

Supervisor Acknowledgement of the Review

1. Wait until the employee has completed their acknowledgement step.
2. Once you have reviewed your employee's self-review, log into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
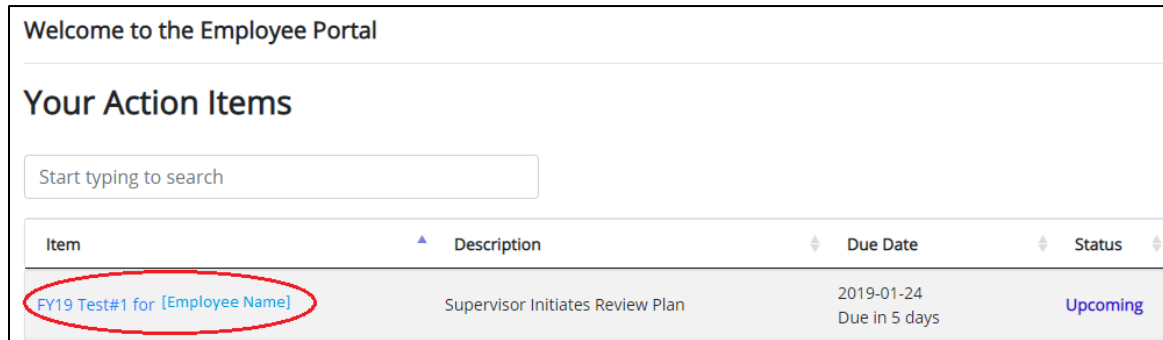3. Click on the Item name for the employee whose review you wish to acknowledge:

4. Click on the "Approvals & Acknowledgements" tab on the left to see if the employee left a final comment in their acknowledgement.
5. Navigate to the "Supervisor Review (Step 3)" page.
6. Enter a final comment in the "Comments" box at the bottom, if needed.
7. Use the Actions drop-down menu and choose "Acknowledge". The review process for this employee is now complete!

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Uploading Paper Reviews

1. Have the employee complete their self-review either on paper or in the online system.
   a. If they wish to do their self-review in the online system, you must complete the Plan: Step 1. Please see the Performance Review Plan steps above to allow them access to their self-review.
2. Complete your supervisor review on paper and have a review meeting with the employee. Both parties should sign the supervisor review.
3. Please note that the employee signature does not indicate agreement with the review, only receipt of it. Scan the Supervisor Review and Employee Self-Review (if done on paper) into a single PDF document (make sure the Supervisor Review has been signed).
4. Log into the Employee Portal of PeopleAdmin. Be sure to click on the yellow text to log in with your NetID (see login instructions above for more information on how to log in).
5. Click on the Item name for the employee whose review you will be uploading:

Welcome to the Employee Portal

Your Action Items

Start typing to search

Item	Description	Due Date	Status
FY19 Test#1 for [Employee Name]	Supervisor Initiates Review Plan	2019-01-24 Due in 5 days	Upcoming

6. If someone else will be uploading the review instead of you, add a Co-reviewer (using the "Add Co-Reviewer" button) and have them follow the rest of the steps below.

Review Type:	Focal
Program Timeframe:	08/01/16 to -
Co-reviewer:	Add Co-reviewer 🗑
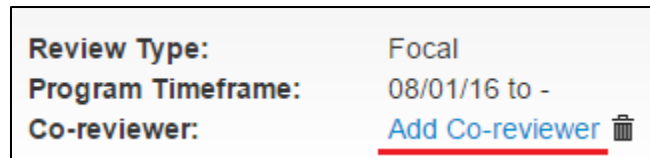
7. Complete the Plan: Step 1 using the Performance Review Plan steps above, if you haven't already.

8. Navigate to the "Supervisor Review (Step 3)" page.
9. Navigate to the "Method of Review" tab.
10. Choose "Uploading Performance Document" for your method of review.
11. Click "Save Draft" at the bottom.
12. Navigate to the "Attachments" page.
13. Name and choose the PDF of the reviews.
14. Click "Upload File".
15. If you wish to upload any additional documents, click "New Attachment" and repeat the process.

Overview
Plan (Step 1)
Supervisor Review (Step 3) ⬅
Self Review (Step 2)
History

16. After you are finished uploading, navigate to the "Future Goals and Objectives" page.
17. Use the "Complete" button at the bottom of the final tab. Or, use the Actions drop-down and choose "Complete" there.
18. Navigate to the "Supervisor Review (Step 3)" page again.
19. Approve the review by either:
    a. Using the "Actions" drop-down menu at the top and choosing "Approve" or by scrolling to the bottom, clicking "Approve", and confirming.

| Actions ▾ |
| --- |
| Print |
| Return |
| Approve |

↺ Return   ↺ Approve
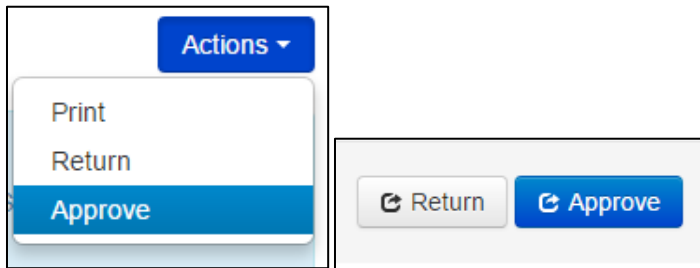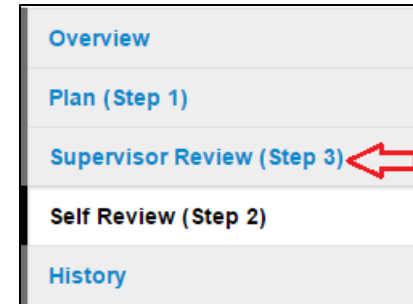
20. Acknowledge the review. You should acknowledge the review ONLY if the employee has signed the paper review form uploaded as an attachment by the supervisor OR if the employee has refused to sign the paper review.
    1. Navigate to the "Supervisor Review (Step 3)" page.
    2. Use the Actions drop-down menu and choose "Acknowledge". The review process for this employee is now complete!
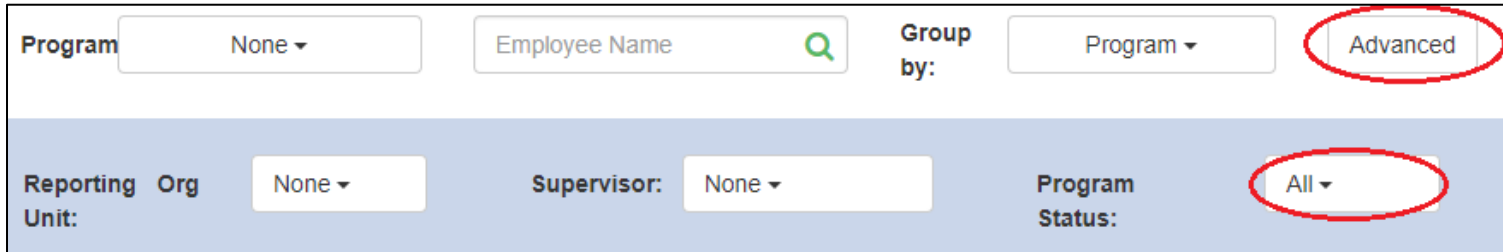
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Accessing Employees' Past Reviews

1. Log into the Employee Portal of PeopleAdmin. See the Accessing the PeopleAdmin Performance Module section at the start of this guide for help logging in.
2. Click on "My Employees' Reviews".
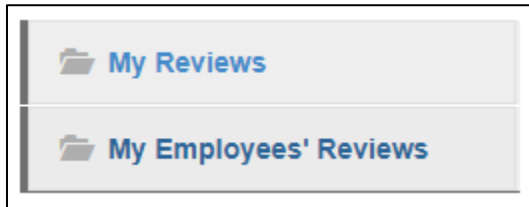
3. Click "Advanced" and change "Program Status" to "All".

4. Type the employee's name into the search bar and hit the 'Enter' key or skip to the next step if you see the review that you want in your list below.
5. Click on the employee's name for the review you wish to view. Note that you may see multiple reviews for an employee if they've had more than one review completed in the system over the years.
6. Click "Supervisor Review (Step 3)" to see the official supervisor review.
    a. If a paper review was uploaded, you will need to scroll to the bottom of the Supervisor Review page to download it.

Performance Review Resources

- Employee Performance Review Mini-Manual
- HRS How-to Guides Page
- PeopleAdmin Login Page

Please do not hesitate to contact Human Resource Services at HRSinfo@uvm.edu or 802-656-3150 with any questions.

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