



## TBR System Office

# Performance Management Employee's Guide

A Step-By-Step Employee Guide for completing performance evaluations in the PeopleAdmin Performance Management Suite

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PeopleAdmin 7.0 is a multi-functional system and is used to facilitate an electronic process for performance management.

PeopleAdmin Performance Management provides electronic storage of appraisals, electronic retrieval of evaluations for both the employee and supervisor, and provides dashboard indicators for data review. Paper evaluation forms will no longer be used for employee evaluations.

As part of the performance appraisal process, you will acknowledge the criteria used for your evaluation and you may be instructed by your supervisor to complete an assessment of your goal completion from the last evaluation cycle. It also provides you the opportunity to attach any other related information, such as accomplishments, certifications obtained or renewed during the past year, etc. This will require you to login to PeopleAdmin and complete the assessment on-line.

This user's guide is intended for employees to utilize for completion of the performance evaluation process with the supervisor. A separate guide is available for the supervisor to complete the evaluation.

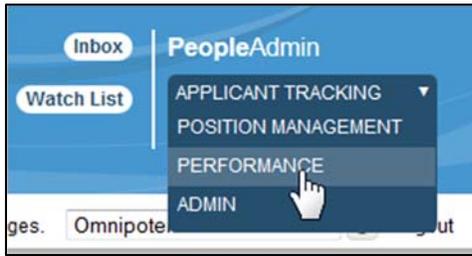
### **Step 1 - Login:**

Click on <https://jobs.tbr.edu/hr/sessions/new>

Human Resources will provide your initial userid and password. Once established, you will use the same userid and password for performance management as you do for other PeopleAdmin functions.

## **Step 2 – Go to Performance Management Module:**

After Logging in to PeopleAdmin, use the navigation menu to move to the “Performance Management” module.



After you have selected “Performance”, you will be redirected to the Performance Management module.

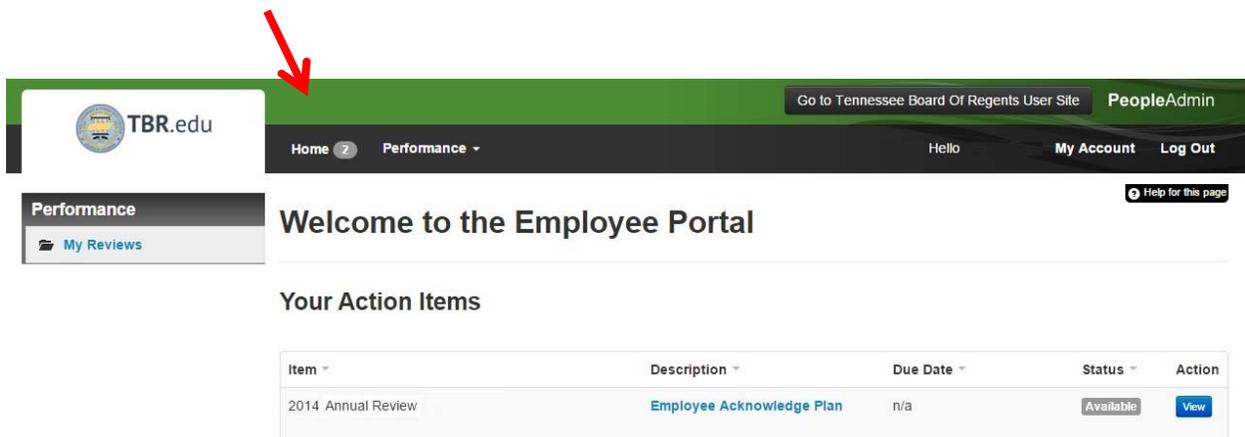
## **Step 3 -The Employee Portal:**

Employees will access the performance evaluation through the Employee Portal.

To enter the Employee Portal, click on the Employee Portal link in the Performance Module.

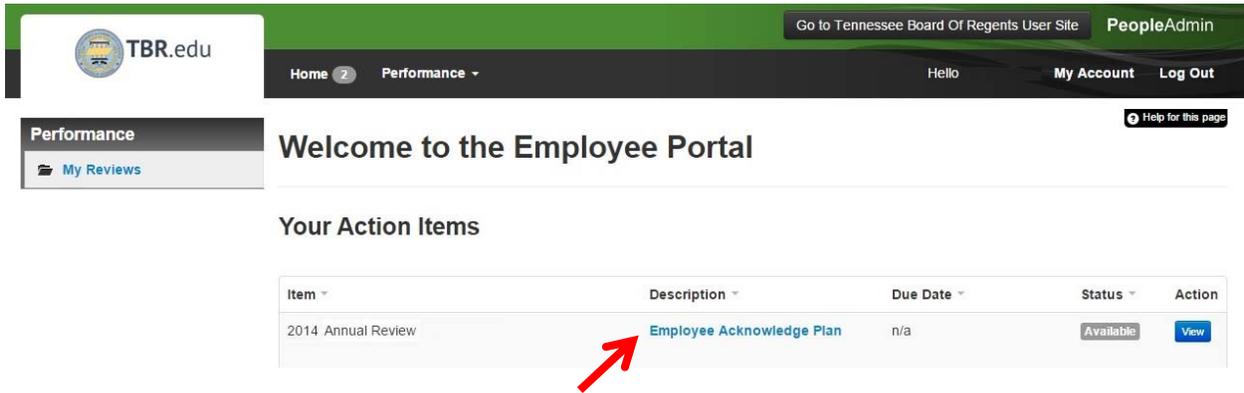


The system will bring you to the ‘Welcome’ page where you will see the action that is waiting for you. If you do not see this page, click on the ‘Home’ icon in the upper left portion of your screen, which will take you to this screen:



## Step 4 – Employee Acknowledge Plan:

Click on the ‘Employee Acknowledge Plan’ link or click on ‘View’.

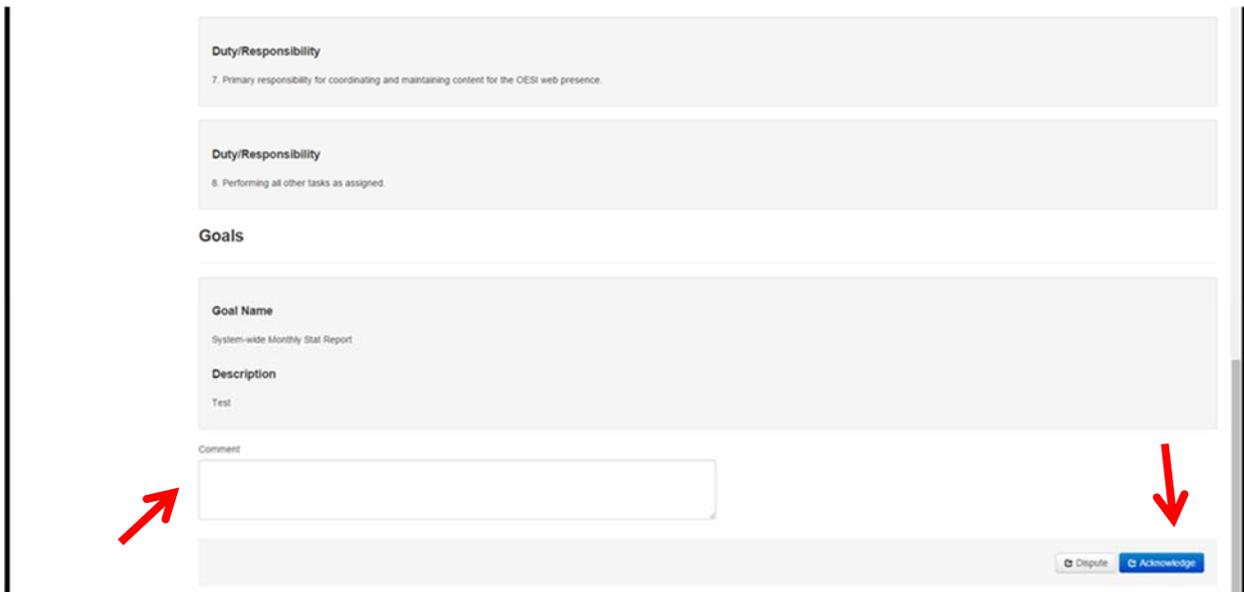


The screenshot shows the TBR.edu Employee Portal. The top navigation bar includes 'Home', 'Performance', 'Hello', 'My Account', and 'Log Out'. The main heading is 'Welcome to the Employee Portal'. Below this is a section titled 'Your Action Items' containing a table with the following data:

Item	Description	Due Date	Status	Action
2014 Annual Review	<a href="#">Employee Acknowledge Plan</a>	n/a	Available	<a href="#">View</a>

A red arrow points to the 'Employee Acknowledge Plan' link in the Description column.

Review the Standard Evaluation Competencies in which you will be rated and any goals your supervisor has entered from your previous performance cycle. Click on Acknowledge at the bottom of the screen to continue to the next section where you will enter your status on the previous performance cycle’s goals, make comments, and attach other related documents. Do not use the dispute button at this stage of the evaluation process.



The screenshot shows the evaluation form with the following sections:

- Duty/Responsibility**
  - 7. Primary responsibility for coordinating and maintaining content for the OESI web presence.
  - 8. Performing all other tasks as assigned.
- Goals**
  - Goal Name:** System-wide Monthly Stat Report
  - Description:** Test
  - Comment:** [Text input field]

At the bottom right, there are two buttons: 'Dispute' and 'Acknowledge'. A red arrow points to the 'Acknowledge' button.

## Step 5 – Employee Self Evaluation

The previous step will bring you to the dashboard. Click on Self Evaluation.

The screenshot shows the PeopleAdmin interface for a 2014 Test Annual AP-Evaluation. The top navigation bar includes 'Home', 'Performance', 'Hello', 'My Account', and 'Log Out'. A notification at the top states 'Your acknowledgement was recorded'. The main content area displays the evaluation details: Evaluation Type: Focal, Program Timeframe: 02/18/15 to 03/13/15, Co-reviewer: N/A, Review Status: Overdue, Last Updated: March 26, 2015 13:55, and Last Completed Step: Employee Acknowledge Plan. The left sidebar contains a navigation menu with 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Progress Notes', 'Approvals & Acknowledgements', and 'My Reviews'. The main content area features four tiles: 'Plan' (orange flag icon), 'Self Evaluation' (magnifying glass icon), 'Progress Notes' (yellow envelope icon), and 'Approvals & Acknowledgements' (clipboard icon). A red arrow points to the 'Self Evaluation' tile.

This is a self-evaluation of your goals only. Provide an update on the progress of your goals by clicking on the text box below each item and keying your comments indicating your progress and completion of the goals. If your goals from the previous evaluation period were not entered into PeopleAdmin, you can enter them as an attachment with your notes as to their status by clicking on the “Attachment” tab. You can also add other related attachments to your evaluation. Important: please be sure to click the ‘Save Draft’ button at the bottom of the screen before leaving this page. Once you are finished with the self-evaluation, click on the ‘**Complete**’ button at the bottom of the screen.

**You can then log out of the system.**

Your supervisor will schedule a face-to-face meeting to review your performance evaluation and goals for the upcoming performance period.

**Step 6 – Employee Acknowledge the Evaluation:**

Once your supervisor has met with you, log back into PeopleAdmin following steps 1-3 above.

Click on the ‘Employee Acknowledge Evaluation’ link, which will take you to the screen below.

This is your annual performance appraisal as completed by your supervisor and reviewed during your meeting. Please read through this complete document, including any future goals. There is an area labeled 'Comments' at the bottom should you wish to enter any comments.

The screenshot shows a web interface for a performance appraisal. At the top, it says "Overall Rating". Below that is a grey box containing "Overall Rating", "Meets Requirements", and "Comments". Underneath is a text input field labeled "Comment". At the bottom right, there are two buttons: "Dispute" and "Acknowledge". A red arrow points to the "Comment" box, and another red arrow points to the "Acknowledge" button.

**Once finished, please click on the blue 'Acknowledge' button at the bottom right corner of the screen.** By acknowledging the evaluation you are not indicating agreement with the rating, but rather acknowledging the evaluation has been reviewed with you. If you disagree with your supervisor's assessment of your performance, you may enter comments in the box explaining why you disagree and select 'Dispute'.

You have now completed the evaluation process and can log out of the system. The evaluation will be forwarded to the next level supervisor for review.

If you have any questions, please call Human Resources at X4450.