TBR System Office

Performance Management Supervisor’s Guide


PeopleAdmin 7.0 is a multi-functional system. In addition to our applicant tracking system, PeopleAdmin is used as an electronic approval queue process for job descriptions, employment requisitions, applicant tracking, and 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 are no longer used for employee evaluations.

This user’s guide is intended for supervisors using the performance management module. This guide provides the steps necessary to complete the performance evaluation process and provide job-related feedback to employees in a timely manner. A separate guide is available for employees to complete their self-evaluation and ‘acknowledge’ review of their evaluation with their supervisor.

Step 1 - Login:

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

Contact Human Resources if you have forgotten your userid and password or are a new employee. Once established, you will use the same userid and password for performance management as you do for posting approved vacant employment opportunities and 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, Supervisors and Reviewing Officers will work on and view the Performance requirements and evaluation through the Employee Portal.

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

Step 4 - Review Employee List and Action Items:

When logging in as a Supervisor, this is a typical view – A supervisor sees all action that requires his/her attention. Carefully review the listing of employees. If you are missing any employees or have an employee listed here that is not your direct report, please call Dane’ White in Human Resources at X4450.
**Step 5 - Beginning the Evaluation:**

To begin the evaluation process the Supervisor clicks on View on the right side of the screen and creates the Evaluation Plan.

The Evaluation will consist of three sections - Standard Evaluation Competencies used for all employees that have been pre-populated, Job Specific Criteria or Duties and Responsibilities that pull in from the employee’s position description, and a tab to enter Goals the employee and supervisor agreed upon in a previous performance management meeting. The previous goals will not default. However, supervisors may add them manually and employees may indicate progress completed as part of the evaluation review process.

To review the employee’s previous evaluations, select My Employees’ Reviews on the top left of the screen, and then choose “Completed” under the Open/Completed option. You may then click on View/Review. Documents previously uploaded by the employee, will be under the Self Evaluation link. To review your supervisor ratings and comments from this evaluation, click on the supervisor evaluation link.

The initial step of the current evaluation process is to read through each section and get familiar with the Standard Evaluation Competencies and Job Duties prior to rating the employee. The Standard Evaluation Competencies section allows supervisors to add, remove, or revise criteria - you will not be entering evaluation ratings yet. Navigate through the Standard Evaluation Competencies and Job Specific Criteria sections using ‘Next’ at the bottom of the screen. Note, you will not be able to make any changes to the Job Specific Criteria section. Changes to this section must be made to the job description in conjunction with the Office of Human Resources. The third section, Goals, is utilized to capture the previously agreed upon goals. This section is specific to Goals established for the applicable evaluation period - you will have the option on a later screen to enter the goals for the new performance period.
Once you have completed reading all of the evaluation criteria, making needed adjustments, and adding the previous Goals, click on the ‘Actions’ button and select ‘Complete’ or scroll to the bottom of the page and click the ‘Complete’ button.

After clicking ‘Complete’, you will be prompted by a pop-up box asking if you are sure you want to mark this complete. Respond by selecting ‘OK’. By marking this action complete, you are indicating you have read the appraisal factors, added or removed entries, as appropriate, and are now ready to forward the evaluation for the employee to review. Upon completion of a task, the next task in the process becomes available and the specific owner receives an email notifying him/her to take action.

**Step 6- Employee Review of the Evaluation Plan:**

The employee is notified to acknowledge the evaluation review. The employee should review the Standard Evaluation Competencies and Job Specific Criteria sections, noting any additional or revised items that may have been added. In the Goals section, the employee can use the drop down selection to indicate progress toward the previous goals you entered. The Attachment Tab will allow the employee to attach a list of the previous year’s professional development, and attach other items as appropriate for you to review during the evaluation process. The employee needs to acknowledge the plan before the supervisor proceeds with the evaluation process.

**Step 7 – Completing the Evaluation:**

Go to “Your Action Items” screen (to ensure you are on this screen, click “Home”). From your action items screen, select the employee you want to evaluate. Under the ‘Description’ column, click on ‘Supervisor Evaluation.’

There will be directions on the screen for completing the evaluation. Proceed through each of the sections by selecting the appropriate rating from the drop down box immediately below each appraisal factor. A text box to include comments is available after each factor in the Standard Evaluation Competencies and Job Specific Criteria sections.
To see the information the employee added, including the status of the completion of goals and attachments, click on the Self Evaluation Tab on the left side of the screen.

Enter the Future Goals for the next performance period. In the future, these will default and will not need to be entered manually.

The last rating is the ‘Overall Evaluation’. Based on the ratings provided in the individual sections and the employee’s overall performance choose the appropriate overall rating. Include additional overall comments as applicable. Click on Save Draft.

You can click on the Attachments tab and attach any additional relevant documents. Examples could include: letters of commendation, professional development achievements, etc.

Optional: Prior to selecting complete, you may wish to save your evaluation of the employee and schedule the review meeting with the employee. This allows you the option of revising it, if you desire to do so, after your meeting with the employee, including editing the Future Goals.

You can print a copy of the evaluation from the Action tab on the right side of the screen to share with the employee, if you do not wish to review together on the computer screen.

Once you select “Complete” you will not be able to make any changes to the evaluation. A statement will appear on your screen noting you have completed the written portion of the evaluation.

The next step is the Review Meeting with the employee.

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**Step 8 – Meeting with the Employee:**

Schedule a meeting with your employee to discuss the appraisal, respond to any questions presented by the employee, provide feedback, and communicate your expectations and goals for
the next evaluation period. You can print a copy of the evaluation as a working document to review with the employee by going to Actions and clicking Print.

If you want to make any changes, and you didn’t previously click Complete, you may do so at this time. When finished, click Complete.

**Step 9 – Acknowledge Review Meeting:**

After the meeting with the employee, log back into the PeopleAdmin, Performance Management system to acknowledge the review meeting has occurred. To acknowledge, hover over the employee’s name and in the description column, click on ‘Review Meeting’ for the appropriate employee. Click on the ‘Complete’ button below the instructional text.

**Step 10 – Complete:**

You have now successfully completed the supervisor’s portion of the performance appraisal for this employee. Please ask the employee to log into the Performance Management system and acknowledge or dispute the evaluation and add comments. In the section called “Approvals and Acknowledgements” the supervisor can see the comments and any comments associated with the acknowledged or disputed evaluation. A separate guide is available to assist the employee on the Human Resources webpage.

Once the employee has acknowledged or disputed the evaluation, the second level supervisor or ‘Reviewer’ will see the evaluations for employees that report to him/her indirectly in the Action Items. The Reviewer acknowledges the evaluation and the review is complete for this employee. Please repeat this process for each of your subordinate employees.

At each step in the process the owner of the task will be notified via a system email. Once the evaluation has been acknowledged by the Reviewer this will complete the process.

If you encounter any difficulties or questions, please call Dane’ White in Human Resources at X4450.

**Supervisor Reports and Dashboard:**

As the Supervisor, you will be able to search by programs-supervisor-subject-reporting org unit – program type and whether the evaluation is in the open/closed status.
Supervisors can also click on Performance and select the Dashboard-this will display statistics that gives a supervisor a big picture view of items that have been completed – open – and overdue. If you click on the block it will display the actual employee evaluation.