Online Performance Reviews with PeopleAdmin

Supervisor Guide

This detailed guide is designed to help you, the supervisor, navigate the online Performance Communication Process using PeopleAdmin. Included in this guide are screen shots to show you the step-by-step details, with hints and tips for smooth sailing through the process.

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If you have any questions or need assistance through the process, contact the Office of Human Resources & Payroll:

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A. The Performance Communication Process

Your VOICE should be heard, and we want to hear it! WPI’s VOICE stands for Virtue, Output, Integrity, Collaboration, and Excellence are the proficiencies we measure against for our communication process.

The performance communication process is the culmination of regular check-ins and discussions between employees and their supervisors about assigned duties and responsibilities, job performance, and goals for the future. This process is a combination of written and oral communication and is intended to recognize solid performance, successes and achievements, as well as to identify opportunities for development and growth.

This process is essential for promoting personal success and fostering a collaborative culture on campus. Discussions about performance help supervisors gain insight into their employees’ strengths and abilities, and allows them to recognize achievements and evaluate job progress. Feedback from this process aids in the development of effective training programs to further expand knowledge and skills.

The performance communication process is built as a pay-for-performance structure. Salary increases are awarded annually, effective the first of July each year. The amount of the salary increase pool of funds is recommended by the administration and approved by the Board of Trustees. The method of allocating funds is based on rewarding meritorious performance. Merit increases will be awarded on a pay-for-performance basis and are based on individual performance. When used as intended, this structure achieves the goal of rewarding truly top performers with merit increases that match their achievements and contributions.

For additional information regarding how to evaluate your employees effectively and objectively and points to remember when meeting to discuss performance with your employees, please refer to the Additional Resources section of this guide.
B. The Performance Communication Checklist

The checklist is an optional tool to further assist you through the performance communication process. It is primarily designed to aid supervisors, but we encourage all employees to review it and be aware of the steps. Each step is listed below, and a link to the checklist can be found in the Additional Resources section of this guide.

**VOICE**
Virtue Output Integrity Collaboration Excellence

Performance Communication Process Checklist

*Two weeks before the meeting...*
- Gather documentation and feedback on employee performance
- Review employee’s current job description
- Contact Human Resources to sign up for a training session if needed

*One week before the meeting...*
- Schedule a meeting with the employee
- Have the employee complete their own self-evaluation

*While completing the written evaluation...*
- Provide specific comments for each area on the Performance Communication Form
- Confirm that the overall rating is consistent with the individual ratings of each competency

*Following the meeting...*
- Review salary process guidelines to determine an appropriate recommendation, if exceptional merit is being requested, be sure justification was provided on the performance communication form.
- Submit a position description modification (if applicable) in PeopleAdmin
- Confirm that evaluation is signed by the employee and yourself
- Schedule any recommended training or professional development for employee
- Schedule a follow-up evaluation if performance rating does not meet expectations
- Review salary letter with employee on May 1st
C. PeopleAdmin

1. How do I login?

⇒ Go to the HR Website to find the link for PeopleAdmin.

⇒ Click the SSO Authentication link to login.
⇒ Use your WPI credentials to login.

When you are logged in, look in the upper right hand corner for the link to “Go to WPI Employee Portal”.

⇒ When you are logged in, look in the upper right hand corner for the link to “Go to WPI Employee Portal”.

Melissa Luzzo, you have 0 messages.  Employee ▼  ▼  logout
2. How do I Access / Complete the Communication Forms?

⇒ Upon login, this is what your Employee Portal screen will look like:

- Your open performance communication action items will appear in your queue.
- Select an employee to get started.

⇒ The following screen is what you will see when you open the employee’s form:
⇒ If applicable, the first step should be to review the employee’s self-evaluation form.
⇒ Select “Self Evaluation” from the left side menu.
⇒ If you would like to print the self-evaluation, select the blue “Actions” button and click “Print”.
  ● If your employee submitted attachments, it is important to save these documents to your desktop so you can re-attach them to the form at the end of the process.

⇒ Once you have finished reviewing your employee’s comments, click on “Supervisor Evaluation” from the left side menu to begin.
⇒ Enter your comments into each field on the VOICE tabs. Remember, VOICE – Virtue, Output, Integrity, Collaboration, Excellence.

⇒ Note the new ratings:
  o Trailblazer: Regularly goes above and beyond and surpasses expectations of the position.
  o Solid Performer: Consistently meets expectations and occasionally exceeds expectations.
  o Developing: Performing at an acceptable level of performance and requires development in an area.
  o Needs Improvement: Inconsistent performance and/or performing below expectations.

⇒ Select the appropriate rating for your employee on each of the VOICE tabs.

⇒ When you reach the end of each tab, you will see the following options:
  o Click “Next” to continue to the next tab.
  o Click “Save Draft” to save a draft of your form before proceeding.
⇒ On the Leadership tab, enter comments regarding your employee’s supervisory responsibilities, if applicable.

⇒ Complete the Growth and Development tab to comment on your employee’s prior year goals, special accomplishments, and strengths / areas for development.

⇒ The Growth and Development tab is also an appropriate time to review your employee’s job description to ensure the tasks and responsibilities are currently reflected. To review the job description, select your employee’s title under their name in the upper left corner of the screen:
The job description screen will look like this:

- Review the job description.
- If you need to modify the position, select the option highlighted in red below to make changes.

Enter the overall rating for your employee on the “Overall” tab.

- Please note: If you are requesting a merit increase for your employee, justification should be noted in this section.
On the Training & Development tab, select the training options that would best suit your employee’s professional needs, and add comments if applicable.

To advance to the Attachments tab, it is important to click “Save Draft” then click the Attachments tab. DO NOT HIT COMPLETE at this point if you wish to attach documents, as Complete will send your form to the next stage in the process.
Attach any supporting documentation to the form. You may attach more than one document by hitting “New Attachment” after uploading each document.

When you are finished adding your documentation, you can navigate back to the Training & Development tab. Click “Complete” at the bottom of the screen, or under “Actions” you can click “Complete”, “Save Draft” to come back and finish the form at a later time, or “Print” to print a copy of your form before submitting it.
⇒ Click OK to complete the form.

Are you sure you want to complete this supervisor evaluation?

OK  Cancel

⇒ Congratulations! You have successfully completed your employee’s performance communication form!
3. Next Steps

⇒ Your employee’s completed performance communication form will be advanced to the next stage in the process, which will require approval from the next tier of management. Once your manager approves the form, it will be available for your employee to review, acknowledge and comment.

⇒ Your employee portal screen will look like this, and you will be able to check on the status of your employee’s performance communication form:

![Employee Portal Screen](image)

⇒ Once your manager / employee has acknowledged the form, your screen will look like this, and you will be able to see any comments made on your evaluation:

![Employee Portal Screen with Comments](image)
⇒ Select the action item that you would like to view.

⇒ Comments will appear at the top for your review.

⇒ The meeting to review this communication form should be scheduled between you and your employee. Once you have reviewed the form, the process is complete. No further action is required in PeopleAdmin.
D. Did You Know?

⇒ Your My Reviews page will default to open programs, but if you would like to search for past reviews, you can change the search filter to Completed. You may also search by the other criteria listed in the left-hand column.
E. Additional Resources

You may refer to our Performance Management website for the following information:

⇒ Quick Start Guide
⇒ Checklist
⇒ Performance Communication Process Presentation