

PEOPLEADMIN TRAINING
CREATING THE PERFORMANCE PLAN
FOR CLASSIFIED STAFF

November 2009 (revised)

PERFORMANCE EVALUATIONS

The Performance Evaluation module is available only to evaluating supervisors and reviewers.

To complete the Performance Plan, go to: <https://jobs.radford.edu/hr>

Note: If you are an Evaluating Supervisor or Evaluation Reviewer you must ensure you are logged into the system with the “Evaluating Supervisor” or “Evaluation Reviewer” view and not the “Level 2” or “Level 3” view. To change your approval level view please see the PeopleAdmin training procedure “Administrators With More Than One View.”

To create an employee evaluation:

1. Click on **Begin New Evaluations** under the **Evaluation** heading on the left side of the screen.
2. You will now be on the **Choose Evaluation** screen. Select the type of evaluation you wish to create (Classified Staff or A/P Faculty).
3. Click on **Start Action**.
4. You will be on the **Staff Evaluation** page. Search for the Evaluation you wish to create by selecting the Position of the person you wish to evaluate. You may either scroll through the different classifications or go to the bottom of the page and search on role title, working title, position number, employee ID number, employee first name, or employee last name.
5. After the position is located, click on **Start Action** under that position.

Note: If the position is not listed go to the Position Description tab and click on “Begin New Action” to enter the employee EWP in PeopleAdmin (See PeopleAdmin Training procedure “Positions.”

6. You will now be on the **Create Evaluation** screen. Ensure you will need to fill in all the information on the screens presented. The plan year is 10/25/09 to 10/24/2010.

7. Click on **Continue to Next Page** button to continue.
8. You will now be on the **Supervisor/Performance Management** tab. Because this is the performance plan and not the evaluation, click the “**Not Applicable**” radio button to be able to continue to the next page.
9. When you get to the **Major Tasks, Responsibilities, and Expectations** screen the descriptions of the job tasks/responsibilities will pull data from the position description. You will see an **Edit** button but you will not be able to edit the Major Tasks, Responsibilities, and Expectations in this module. Changes may only be made on the **Position Description** module using the **Modify Position Description** selection.
10. The **Special Assignments and Department/Unit Objectives and Expectations** tab may not contain any data. If you wish to enter information in these sections, click on **Add New Entry**, enter the information. Click on Add New Entry if additional objectives/expectations are required. If you wish to view or edit, click on the applicable buttons. When you have completed this section click on **Continue to Next Page**.
11. The **Employee Development Plan** has two sections which must be completed; then click on **Continue to Next Page**.
12. You will now be on the **Overall Results, Assessment and Rating Earned** page. Since this is the performance plan leave this page should be left blank.

Note: This section is completed during the annual performance evaluation cycle which normally begins in mid-August and continues through the end of the applicable performance cycle. Human Resources announces when supervisors may begin the evaluation process.

13. The next page is the **Attach Documents** page. Here you may attach an organizational chart, supporting documentation, etc. After attaching the supporting documentation, if any, click on **Continue to Next Page**.
14. The **Notes/History** tab displays the history of the evaluation. Click on **Continue to Next Page**.
15. You will now be on the **View Staff Evaluation Summary** page. You may scroll through and view the evaluation and print it by clicking on **Printer Friendly Version** in the upper right hand corner. At this step you may (1) **Save** the evaluation to go back to later or (2) **Send to Evaluation Reviewer** (3) or **Cancel** the action. At this step if the evaluation plan is complete and satisfactory you would normally send it to the evaluation reviewer.

16. Click **Continue** then **Confirm** to send the evaluation to the reviewer.

Note: An e-mail is automatically sent to the Evaluation Reviewer informing that the performance plan it is available for review.

REVIEW BY EVALUATION REVIEWER

The reviewer (the rater's supervisor) receives an automatically generated email advising that an evaluation (performance plan) is available for review. The rater performs the following actions:

1. Click on the **Active Evaluations** button under Evaluations on the left side of your screen.
2. The **View Active Evaluations** screen will display each evaluation you are required to review.
3. Click to **View** the evaluation you wish to review. You may scroll through and view the evaluation or print it by clicking on **Printer Friendly Version** in the upper right hand corner.
 - a. Changes may not be made to the evaluation in the Performance Evaluation module. Note any recommended changes in the "comments" section and **return** the document to the **Evaluating Supervisor**. The Evaluation Supervisor will make the changes as necessary and return the document to you for review/approval.
 - b. Approval. If you are satisfied with the evaluation plan you may **Save** it for later return to the evaluating supervisor. You may also return the document immediately by clicking on **Send to Evaluating Supervisor**; and click on **Continue** then **Confirm**.
4. An e-mail will be sent to the Evaluating Supervisor informing that it has been reviewed and being returned to the Evaluating Supervisor.

AFTER REVIEW BY EVALUATION REVIEWER

The **Evaluating Supervisor** will receive an automatically generated e-mail advising that an evaluation is sent by the Evaluation Reviewer. The Evaluating Supervisor will complete the following actions:

1. Click on the **Active Evaluations** button under Evaluations on the left side of your screen.

2. The **View Active Evaluations** screen will display each evaluation you need to review.
3. Click **View** on the evaluation you wish to review.
 - a. **Changes.** If changes are noted in the comment section you must return to the **Position Description** view to make changes. Return to the **Performance Evaluation View** to ensure the changes appear. Repeat the approval process of sending the evaluation to the **Reviewer** for approval.
 - b. **Approved by Reviewer.** Since all employees do not have user access to the Performance Evaluation system at this time, please print the evaluation and schedule a meeting with the employee to discuss performance expectations.
4. After you and the employee have met and agree with the performance plan, have the employee sign the paper copy in the space provided. You will also sign the form as supervisor.
5. After signature you may provide the employee with a copy of the document and you should keep a copy in your supervisor file. Send the copy with original signatures to Human Resources.

NOTE: DO NOT ELECTRONICALLY SUBMIT PLAN TO HUMAN RESOURCES. This step is performed only upon conclusion of the respective performance cycle.

DUTY CHANGES DURING THE PERFORMANCE CYCLE.

If duties/task/responsibilities change during the evaluation period, changes should be updated in the Position Description which will automatically update the Performance Plan. If this occurs, the Plan must be approved by the supervisor and the Reviewer and a copy printed for the employee to sign within 30 calendar days of the change in duties. A copy of the updated performance plan with original signatures must be sent to Human Resources.