INTRODUCTION

We would like to announce the launch of this year’s Performance Management cycle. The Performance Management system is an online evaluative tool for Administrative & Support Staff that will be utilized to complete performance progress throughout the entire year. With this announcement begins the introduction of the Plan (Strategic Goals & Objectives) portion of the evaluation cycle. Training sessions will be announced soon and will be held on an on-going basis.

As we move forward into the next cycle, HR will be introducing new features within the Performance Management and Position Management modules. Future communications will be sent out to the campus when these changes have been implemented.

The Performance Management module can be found in the PeopleAdmin system. Please visit the HR Website for a direct link and additional resources - https://www.onu.edu/human_resources/performance_management.

PERFORMANCE MANAGEMENT PROCESS AND TIMELINE
STEP 1: ACCESSING THE ONLINE PERFORMANCE MANAGEMENT SYSTEM

- Accessing the Performance Management system:
  - All ONU employees have been given access to the PeopleAdmin system
  - Evaluations are housed in the Performance Management module of this system
  - [https://jobs.onu.edu/hr/sso](https://jobs.onu.edu/hr/sso)
  - Use ONU username and password to log in
  - Select “Go to Employee Portal” in the upper right corner

- Features of the online system:
  - Provides better tracking of evaluation review process cycles
  - Reduces amount of paper needed for the annual reviews
  - Minimizes time spent transferring documents from one reviewer to another
  - Allows for additional steps such as a self-evaluation and mid-year check-in to occur campus-wide
  - Centralized location to house all evaluations from year-to-year
  - Ability to track consistent and confidential tracking of progress and progress notes
  - Email triggers and reminders automatically sent by the system

STEP 2: VIEWING ACTION ITEMS IN THE EMPLOYEE PORTAL

- Viewing action items in the Employee Portal:
  - The “Home” page will show all action items that are currently due, coming due, and overdue
    - Due dates (if assigned) will be visible
  - Employee can view historical data by selecting “My Reviews”
STEP 3: COMPLETING ACTION ITEMS IN THE EMPLOYEE PORTAL

- Identifying actions:
  - Icons will be added and removed from the Employee Portal based upon where ONU is in the review cycle annual process
  - The step previously taken/approved will be listed along the top of the Portal in the upper right corner

- Action items will also be listed in your home page
  - Select the noted action to be taken directly to the step requiring your attention
STEP 4: THE PLAN – PERFORMANCE GOALS & OBJECTIVES

- Employee Plans:
  - This Plan is where the employee’s Performance Goals & Objectives will be documented for the current evaluation cycle
  - Will house individual goals, professional development goals, Divisional or College level initiatives, and University Operational Agenda items
    - The employee will be evaluated on their progress and performance pertaining to each of the items listed
  - Deadlines can be established and supporting documentation can be attached
  - Supervisor will initiate the Plan on the employee’s behalf and will communicate the goals and objectives to the employee to ensure their individual goals are noted
  - The annual evaluation objectives will be listed when the employee’s Plan is developed so the employee can directly relate their goals & objectives to the rated criteria
STEP 5: NOTING PROGRESS THROUGHOUT THE YEAR

- Adding Progress Notes:
  - Notes can be added at any time
  - Progress notes remain confidential to the user (supervisor can add notes about the employee and employee can add notes about their own performance but neither can see the others’ notes)
  - Attachments may be included
  - Intended to be a way to document information throughout the year, rather than waiting until the annual evaluation.
    - The employee may want to make a habit of adding a progress note after each semester, month, etc. to stay on top of the annual performance progress
STEP 6: MID-YEAR CHECK-IN

- Beginning in December, supervisors will be asked to conduct a mid-year review of their employees
  - This is a good opportunity to review any progress notes made by both the employee and supervisor and to evaluate accomplishments towards meeting the previously stated goals and objectives
  - Review progress in a face-to-face meeting between the employee and supervisor
  - The Self-Evaluation and Supervisor Evaluation cannot be completed if the Mid-Year Check-In has not been conducted
STEP 7: SELF-EVALUATION

- Each employee will be asked to conduct a self-evaluation beginning in February
  - The employee will complete the evaluation process using the same evaluative tool the supervisor will use
  - Employees are encouraged to reference their progress notes and performance goals and objectives
  - Attachments can be submitted as supporting documentation
  - The supervisor will be able to view the self-evaluation prior to initiating their own evaluation of the employee
STEP 8: DISCUSSING THE ANNUAL REVIEW

• Discuss the annual review:
  o Review the ratings and comments of the supervisor evaluation and the employee’s self-evaluation in a face-to-face meeting
  o Supervisor will then release the review to the employee to review and acknowledge in the Performance Management system
• Supervisors may attach supporting documents to the employee’s evaluation
  o See FAQ for more information

• Overall Rating definitions:
  o 5 – Outstanding: Performance is clearly outstanding and well above normal expectations. Typically, an employee that receives all 5’s has perfected the duties of their current role and/or are ready to take on additional responsibilities or possibly advance to a higher level.
  o 4 – Good: Performance consistently exceeds requirements of the position in most aspects. An employee who receives mostly 4’s could be ready for advancement to a higher rating or level of responsibilities within a year or two.
  o 3 – Satisfactory: Performance is satisfactory and at an acceptable level of competence. An employee who receives mostly 3’s is working to perfect their job and could be ready to take on new responsibilities within the next several years.
  o 2 – Improvement Needed: Performance is somewhat below the expected level of accomplishment. An employee who receives mostly 2’s needs additional training and coaching in order to become more effective in their role.
  o 1 – Unsatisfactory: Performance is seriously deficient and below minimum acceptable levels. An employee who receives any 1’s will need immediate coaching and training in order to be brought up to speed.

• Discuss the ratings with supervisor to ensure a shared understanding of their assessment of employees performance
STEP 9: ACKNOWLEDGING THE ANNUAL REVIEW

- Acknowledging the annual review:
  - After the supervisor meeting, return to the Employee Portal to add comments, if desired
  - Click the Acknowledge button to finalize the review
  - Upon acknowledging the review, the supervisor will be able to view any comments that were added and HR will then be able to review all information contained within
FREQUENTLY ASKED QUESTIONS

How long does the electronic review process take?

- It is expected that the online review process does not take any more time to complete than the paper-based process. HR’s goal is to streamline the process so it becomes more efficient and less time consuming for all users involved.

What if there is an employee missing from my Employee Portal listing?

- Please notify HR as there may have been supervisory changes, name changes, or other position detail updates since the last evaluation process that have not been captured. The system refreshes nightly, therefore, changes will likely be reflected in the Employee Portal the next day.

What if there is an employee listed in my Employee Portal that does not report to me?

- Please notify HR as there may have been supervisory changes or other position changes since the last evaluation process. The system refreshes every nightly, therefore, changes will likely be reflected in the Employee Portal the next day.

What happens if I miss the deadline to submit or acknowledge a review?

- Overdue items will still appear in the Employee Portal. Employees can complete the necessary tasks until HR closes the program. This is likely to occur in the summer months when planning begins for the upcoming cycle.

What types of files can I attach?

- Employees may attach word-processing documents such as Microsoft Word documents, PDFs, Plain Text documents, Excel spreadsheets, and Graphics (.tiff, .tif, .jpeg, .jpe, .png). All documents are converted to a PDF upon saving and depending on file size (9 MB file size limit), this may take some time to upload. Examples of attachments may include: certificates earned, degrees obtained, emails, articles, publications, etc.

I realized I made a mistake on an employee Plan or Review. What can I do to solve the issue and add accurate information?

- Please contact HR to have the issue resolved. HR has the ability to return items to the supervisor or employee and to edit items after they have been progressed through the system.

I am not sure what to do next. Where can I go to find out?

- Simply log into the Employee Portal and view the Home page. All tasks waiting for the employee’s action will be listed as an action item. Tasks that the employee has already completed can be viewed under “My Employees’ Reviews”.

For any other questions, please contact the Office of Human Resources.
PERFORMANCE MANAGEMENT GLOSSARY

**Acknowledge** – By acknowledging items in the Employee Portal, the employee is applying their electronic signature and verifying/approving that they agree and have reviewed the item they are acknowledging.

**Annual Performance Review Cycle** – The annual performance review cycle is the performance management process and timeline. See page 1 for details.

**Co-Reviewer** – A co-reviewer can be added by HR. This individual will be able to add comments and ratings for the employee to which they have been added. This is intended to be utilized for those individuals who may have multiple supervisors across various departments or dotted line reporting structures.

**Employee Portal** – The Employee Portal is the main webpage where the employee can view their Performance Management action items. All items requiring the employee’s attention will be shown in the Home page of the Employee Portal.

**Evaluation** – The online evaluation is the same tool that ONU has used in the past, but in electronic format. This is the same as a performance review or appraisal.

**Goals & Objectives** – These are the items that will be reflected in the employee’s Plan. Goals & Objectives should include items the employee and the supervisor have discussed and agreed are items the employee should work on throughout the coming year.

**Mid-Year Check-in** – The mid-year check-in is a time in which the employee and supervisor will meet mid-year to discuss the employee’s progress on their goals and objectives, re-establish goals if needed, and plan for the remainder of the year.

**My Employees’ Reviews** – If the employee supervise other employees on campus, they will be able to view their historical performance data in the My Employees’ Reviews option of the Employee Portal. The employee can access this information at any time by selecting this option and using the filters provided.

**My Reviews** – The employee’s historical performance data is located in the My Reviews option of the Employee Portal. The employee can access this information at any time by selecting this option and using the filters provided.

**PeopleAdmin** – PeopleAdmin is a software tool that the University utilizes to track open positions, applications, position descriptions, and performance evaluations. Most users will interact with the performance management module though many others may have some familiarity with the applicant tracking module.

**Plan** – The employee’s Plan will include a read-only version of the upcoming performance evaluation and will allow the employee and the supervisor to list the goals & objectives that have been established for the employee. This plan can include attachments, due dates, and descriptors about each of the goal & objectives established for the employee.

**Position Description** – A position description, or at times referred to as a job description, is an electronic document that includes the duties and responsibilities of the employee’s role on campus. All Position Descriptions (PDs) are housed in the PeopleAdmin system and should be reviewed by the employee and the supervisor on an annual basis to ensure it adequately reflects the work being performed.
**Progress Notes** – Progress Notes are confidential electronic notes stored in the PeopleAdmin Performance Management module that highlight an employee’s performance milestones. These notes can be added by the employee or the employee’s supervisor and should be reviewed prior to the annual evaluation.

**Reviewing Officer** – The Reviewing Officer is the individual responsible for reviewing and acknowledging all performance evaluations for their division or college. The Reviewing Officer will be the Dean or Vice President of the division or college.

**Self-Evaluation** – The self-evaluation is a feature of the performance management system that allows employees to conduct an evaluation of their own performance.

**Supervisor** – The supervisor is the person that the employee reports directly to and who supervises the employee’s work. HR has added reporting relationships based upon who approves the employee’s time. If this is not the employee’s direct supervisor, please contact HR to have this information updated.

**Supervisor Evaluation** – The supervisor evaluation is the annual performance review conducted on an employee by their supervisor.