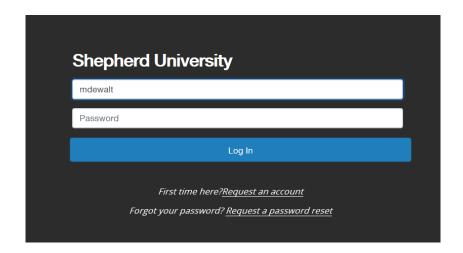
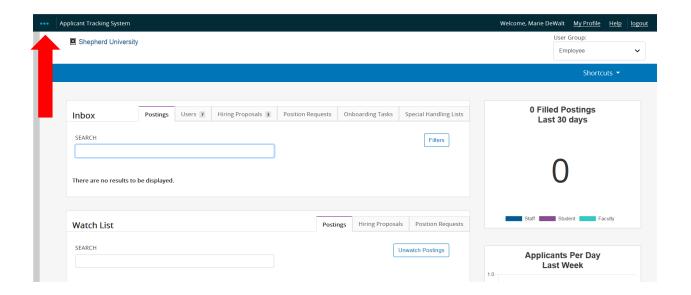
Performance Evaluation Instructions for Supervisors

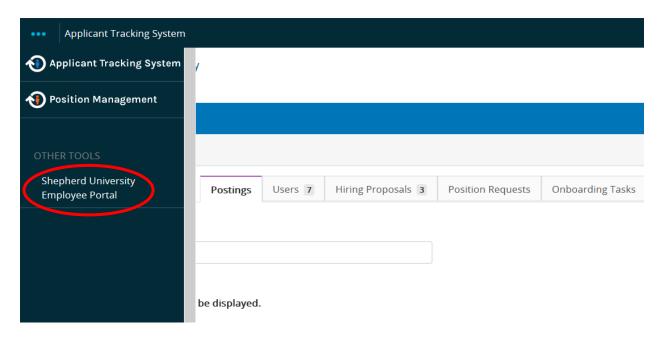
To begin a new performance evaluation for your employee, log in to the HR System (PeopleAdmin 7) at https://jobs-shepherd.peopleadmin.com/hr. All employees already have an account set up in the system. If you do not know your username, please reach out to someone in HR and this information will be sent to you. Please do not click on "Request an Account". For your initial log in, the username and password are the same. You will then be prompted to change your password. Your new password must be a minimum of 6 characters.



Once logged in, click on the three dots in the top left corner, then click on "Shepherd University Employee Portal".

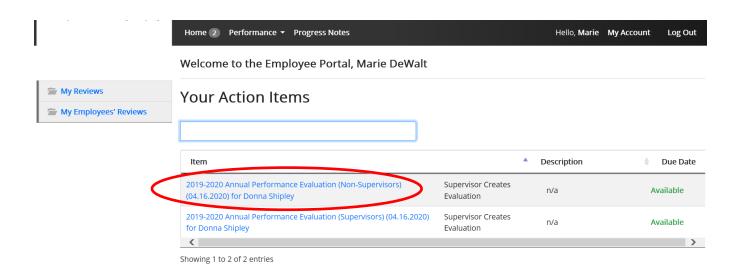


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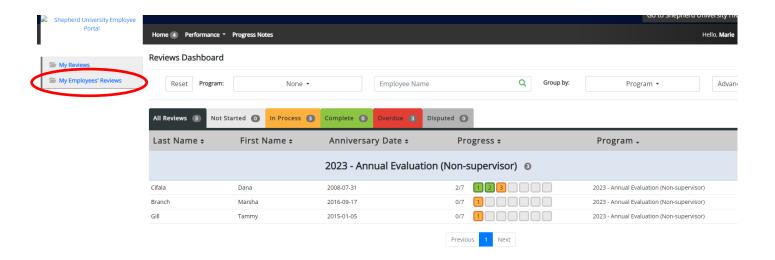


^{*}If you do not see Shepherd University Employee Portal, please contact HR.

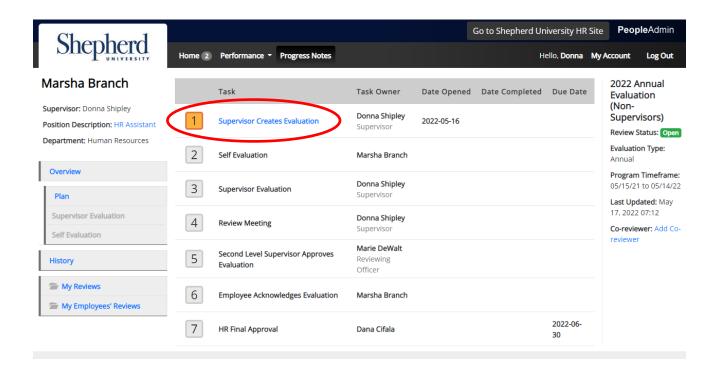
All action items for your employees will be listed here. Please note, there are two types of performance evaluations – one for "Supervisors" and one for "Non-Supervisors". Click on the employee's performance evaluation you want to start.



Supervisors can review the status of all their employee performance evaluations at anytime using the "Reviews Dashboard" by clicking on "My Employees' Reviews" on the left.

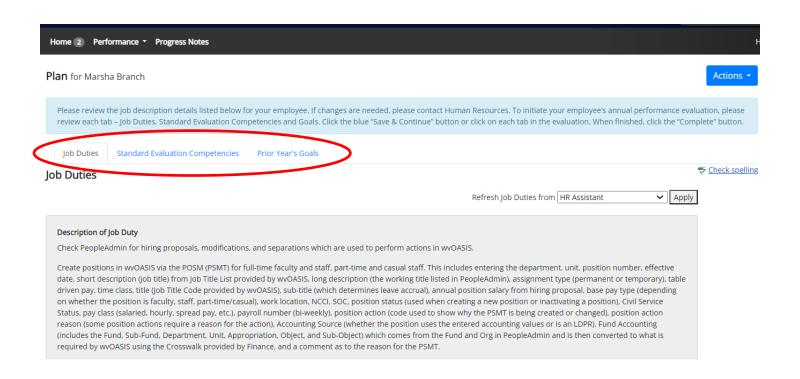


Once the employee's performance evaluation is open, you will see the seven steps of the performance evaluation process listed. Click on step one: "Supervisor Creates Evaluation".

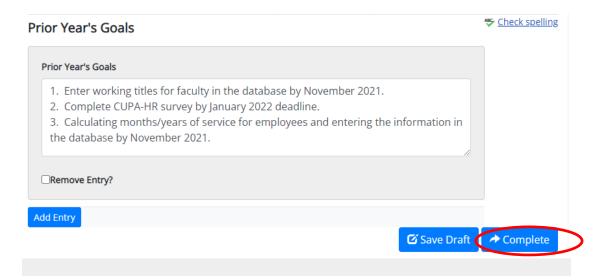


You will then see three tabs – "Job Duties", "Standard Evaluation Competencies" and "Prior Year's Goals". Please review the information on each tab by clicking on the respective tab label. You can also advance through each tab by clicking on the blue "Save & Continue" button at the bottom of each tab.

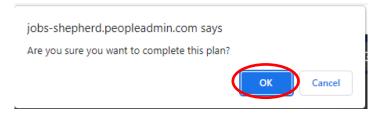
If there are changes needed on the "Job Duties" tab, please e-mail the changes to Donna Shipley (dshipley@shepherd.edu) in Human Resources. *Please keep in mind that any changes that need to be made to the job description will not be evident during the current evaluation cycle.*



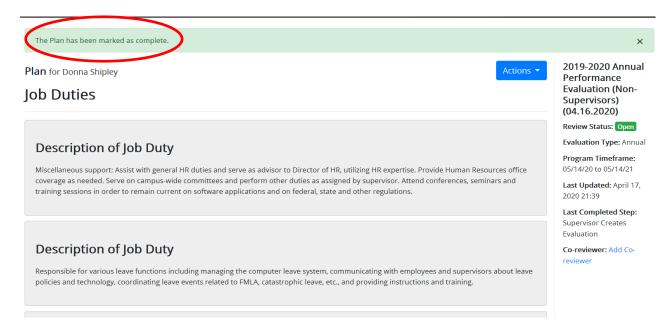
When you have finished reviewing each tab, click on the blue "Complete" button on the "Prior Year's Goals" tab.



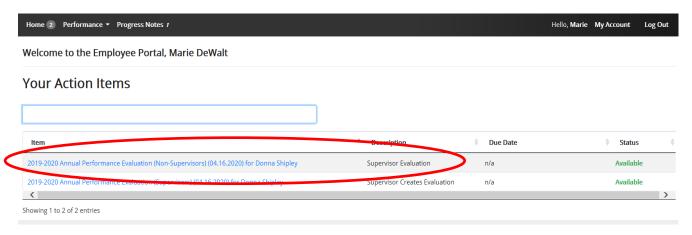
You will get a pop up message that says, "Are you sure you want to complete this plan?" Click "OK".



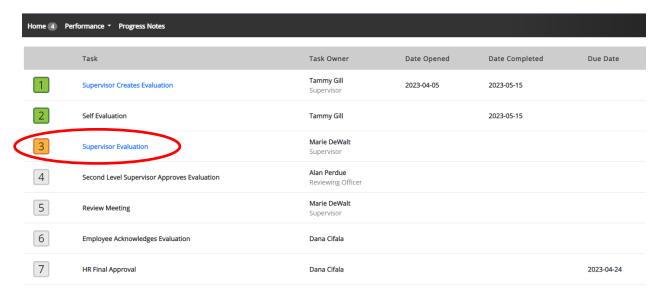
When the plan is marked complete, you will see a green bar across the top of the page. The performance evaluation has now been sent to the employee reporting to you to complete the second step in the process, their self-evaluation.



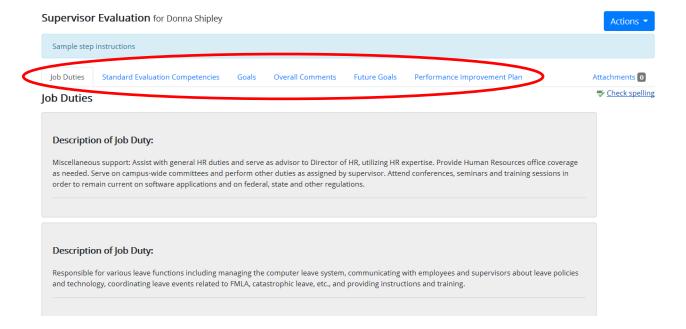
Once your employee completes their self-evaluation, you will receive an e-mail notification. The supervisor can now complete the third step of the process, the "Supervisor Evaluation". Click on the respective action item to open it.



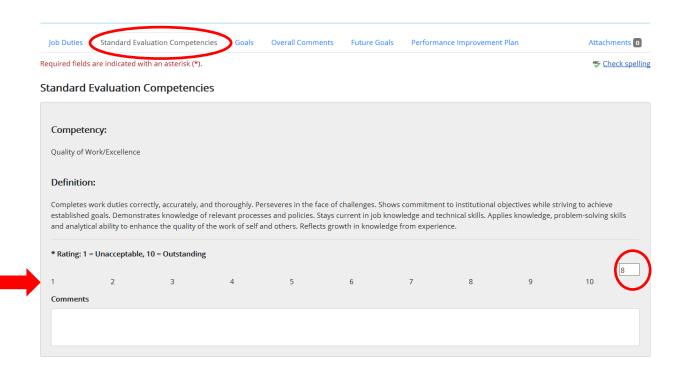
Once the performance evaluation has been opened, click on the third step of the process - "Supervisor Evaluation".



You will see six tabs – "Job Duties", "Standard Evaluation Competencies", "Goals", "Overall Comments", "Future Goals", and "Performance Improvement Plan". Please review the information on each tab by clicking on the respective tab. You can also advance through each tab by clicking on the blue "Save & Continue" button at the bottom of each tab.



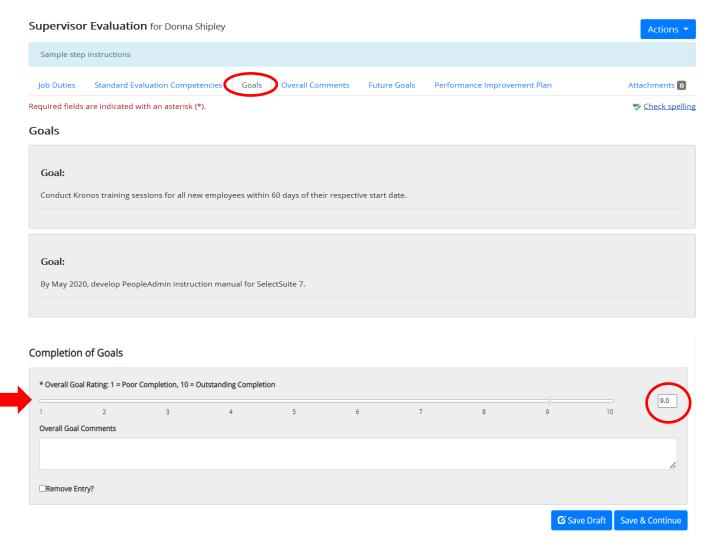
Supervisors should first review the employee's self-evaluation before completing the supervisor evaluation. Next, click on the "Standard Evaluation Competencies" tab and assign a rating of 1-10 for each standard evaluation competency by selecting a number on the rating scale or by typing a number in the box on the right. Ratings must be assigned for each evaluation competency and overall comments must be entered. Please note, a justification must be entered in the respective comments section for all ratings of 1-3 or 8-10. A rating of 1-3 on any competency requires the supervisor to create a Performance Improvement Plan (PIP). Please remember to click "Save Draft" often while working on the performance evaluation.



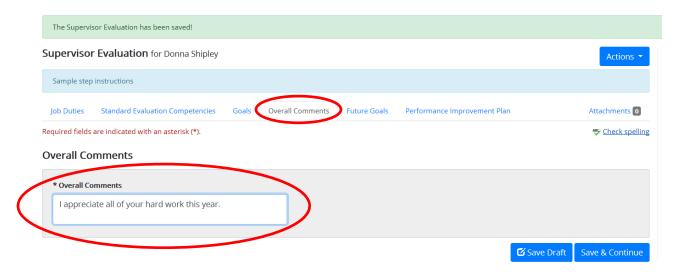
To view the employee's self-evaluation, click on "Self Evaluation" link on left side of screen.

Department: Human Resources					
Overview					
Plan					
Supervisor Evaluation					
Self Evaluation					
History					
My Reviews					
My Employees' Reviews					

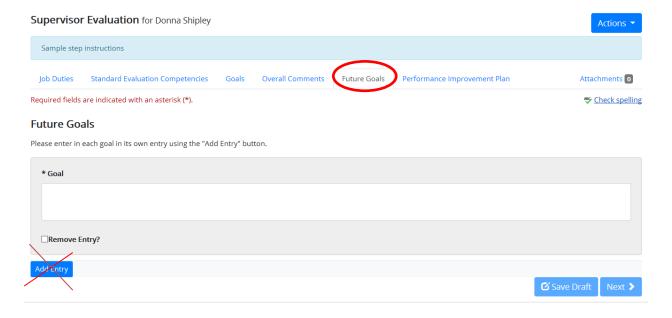
Assign a rating of 1-10 for the completion of all prior year goals by selecting a number on the rating scale or by typing a number in the box on the right. Please note, a justification must be entered in the respective comments section for all ratings of 1-3 or 8-10. Otherwise, overall goal comments are optional.



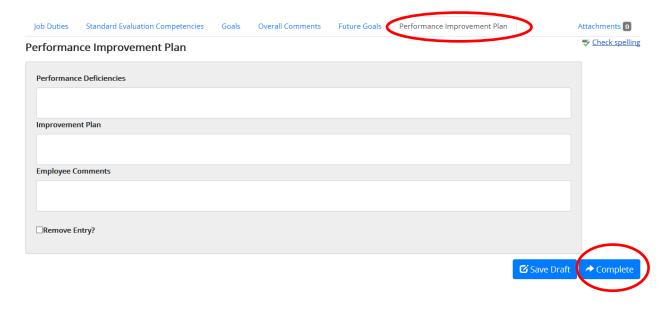
Supervisors are required to enter "Overall Comments" on the performance evaluation.



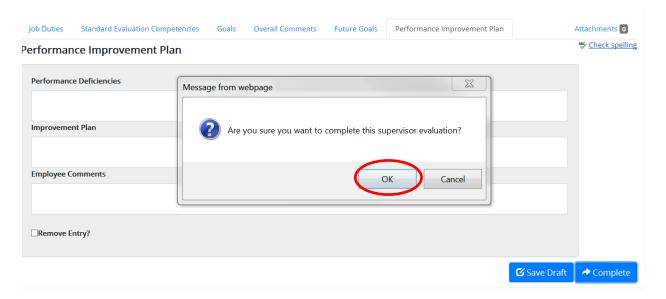
Supervisors must enter a minimum of three goals for an employee on the "Future Goals" tab. All goals must be entered in the same field/box for scoring purposes. If goals are not entered in the same field/box it will cause an error in the scoring of the evaluation. Please do not click "Add Entry" as this will put a goal in a separate field/box.



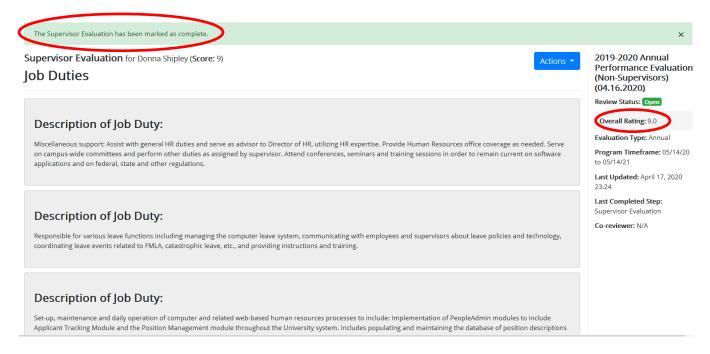
A Performance Improvement Plan (PIP) is only required for employees who receive a rating of 1-3 on any evaluation competency. When finished, click the "Complete" button.



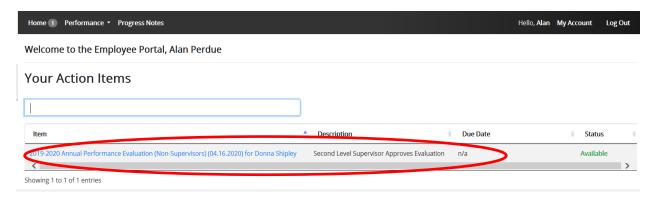
You will get a message that says, "Are you sure you want to complete this supervisor evaluation?" Click "OK".

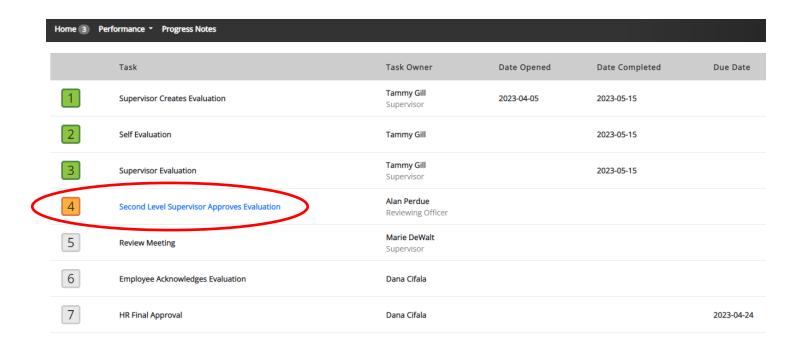


When the supervisor evaluation is marked complete, you will see a green bar across the top of the page. The performance evaluation has now been sent to the second level supervisor for review and approval. Please note, the employee's overall rating will be displayed on the right.



The second level supervisor will receive an e-mail notification when the employee's performance evaluation is ready for review and approval. **Supervisors cannot review/share the performance evaluation with the employee until after this step is completed.** The second level supervisor must access the evaluation from the Action Items list and then click on step 4 – "Second Level Supervisor Approves Evaluation".

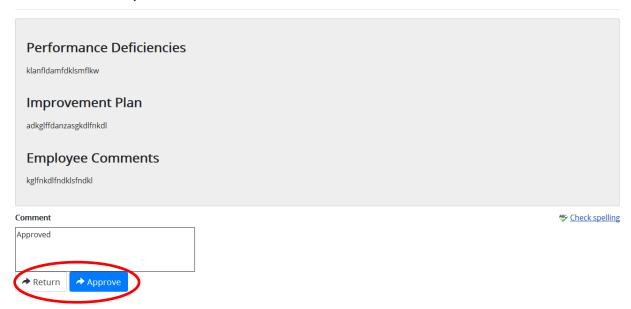




Once the second level supervisor reviews the employee's performance evaluation ratings and comments they will click "Approve" located on the Performance Improvement Plan tab. Comments may also be entered.

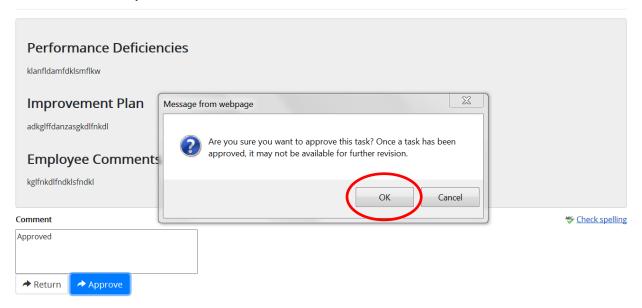
If changes are required, the second level supervisor should select "Return" and enter comments as to what needs to be changed by the supervisor. Comments entered here are not visible by the employee.

Performance Improvement Plan

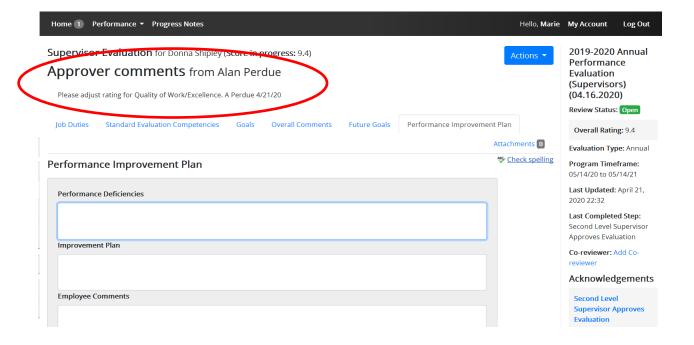


You will get a message that says, "Are you sure you want to approve this task? Once a task has been approved, it may not be available for further revision." Click "OK".

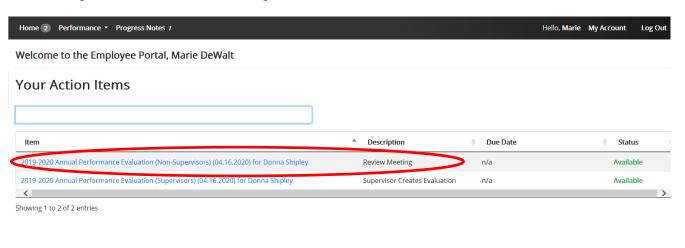
Performance Improvement Plan



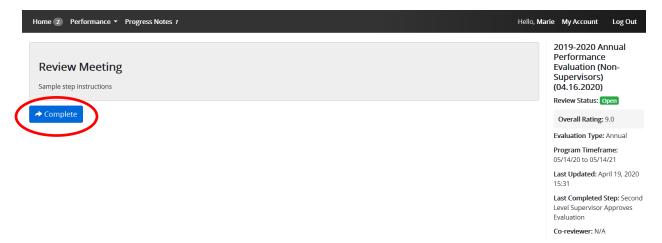
If the evaluation is returned by the second level supervisor, the supervisor will review the comments and make any necessary changes and re-submit it to the second level supervisor for review and approval.



Once the second level supervisor has approved the employee's performance evaluation, the supervisor should conduct step five – the "Review Meeting".

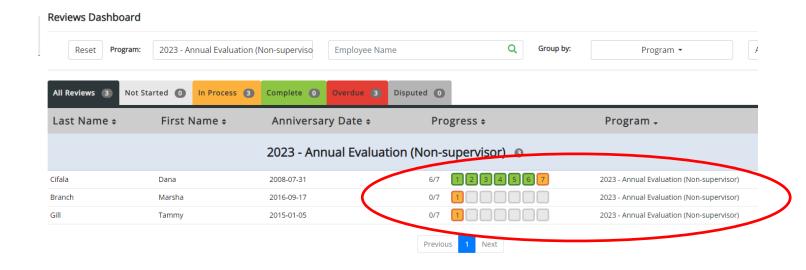


Once the supervisor has reviewed the performance evaluation with the employee, click on "Complete".



The performance evaluation is then submitted to the employee for acknowledgement. The employee can also enter comments. The employee acknowledgement is the sixth step in the performance evaluation process. The evaluation is then submitted to HR for final approval.

	Task	Task Owner	Date Opened	Date Completed
1	Supervisor Creates Evaluation	Tammy Gill Supervisor	2023-04-05	2023-05-15
2	Self Evaluation	Tammy Gill		2023-05-15
3	Supervisor Evaluation	Tammy Gill Supervisor		2023-05-15
4	Second Level Supervisor Approves Evaluation	Tammy Gill Reviewing Officer		2023-05-15
5	Review Meeting	Tammy Gill Supervisor		2023-05-15
6	Employee Acknowledges Evaluation	Tammy Gill		2023-05-15
7	HR Final Approval	Dana Cifala		



To view historical evaluations:

- 1. Click on "My Employees' Reviews".
- 2. Click on the Advanced tab.
- 3. For Program Status, select Closed from the drop down list that will say Active when you get to the screen.
- 4. The display will show a list of employees. Click on the name of the employee to view their historical performance evaluation.

