

WINTHROP UNIVERSITY
Instructions for Employee to Access Documents in the
Performance Area of PeopleAdmin
(Revised - May 17, 2022)

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INSTRUCTIONS FOR EMPLOYEE TO ACCESS DOCUMENTS IN THE PERFORMANCE AREA OF PEOPLE ADMIN

1. HOW TO LOGIN:

1A. Sign in to Wingspan

- i. Under the heading Employee Tools , select "Performance Management"(screenshot #1)



SCREENSHOT #1

1B. You may or may not see this screen and have to provide your WU login credentials a second time (full email address with Winthrop.edu included):

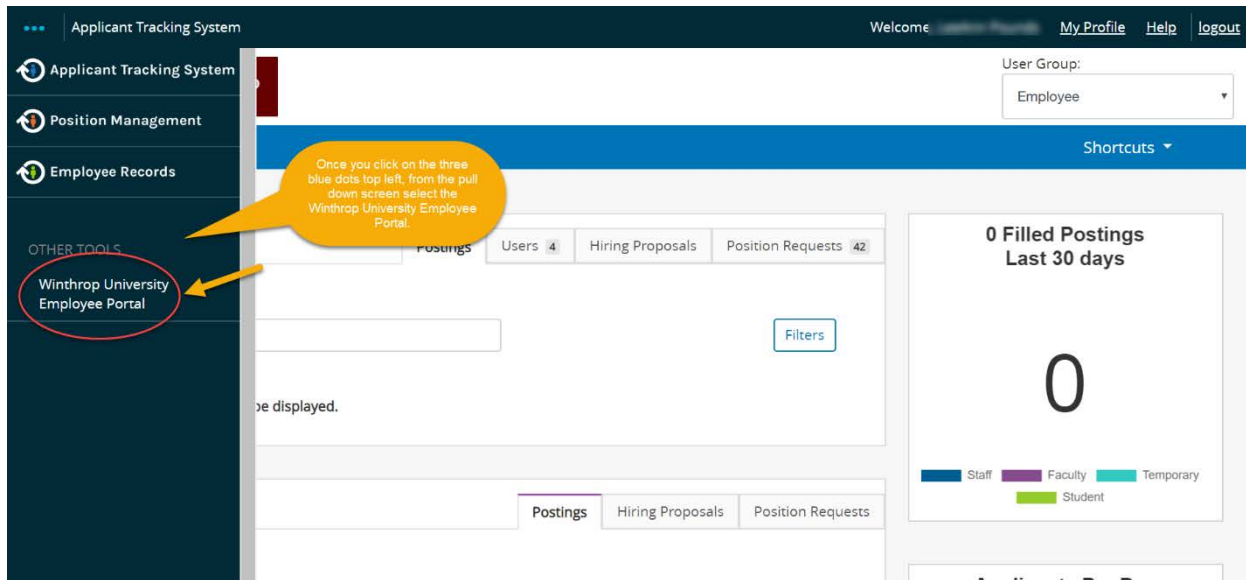
SCREENSHOT #1B



1C. Next you will be taken to the Home Screen of People Admin.

- i. On left top, right click on the three blue ellipse/periods
- ii. Then select “Winthrop University Employee Portal”

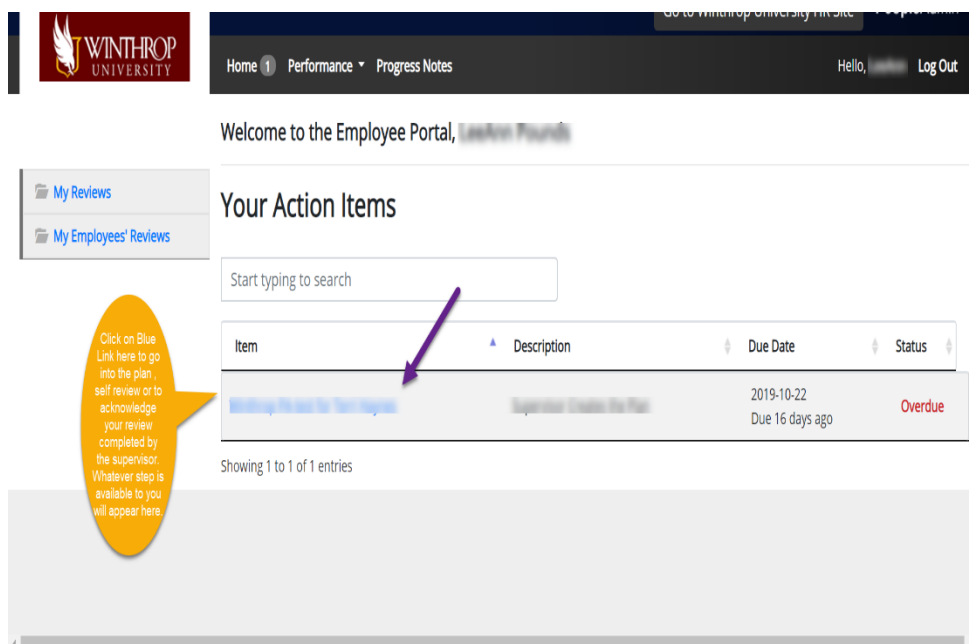
SCREENSHOT #1C



This will take you to your personal launch page (see Screenshot #1D) with your personal available action items shown:

1D. Once you click on the blue link providing access to the task available to you, you will enter the Action Item, which could be either:

- i. Acknowledge your plan – See Step 3 Below
- ii. Complete a self-evaluation or See Step 4 Below
- iii. Acknowledge your evaluation completed by your supervisor – See Step 5 Below

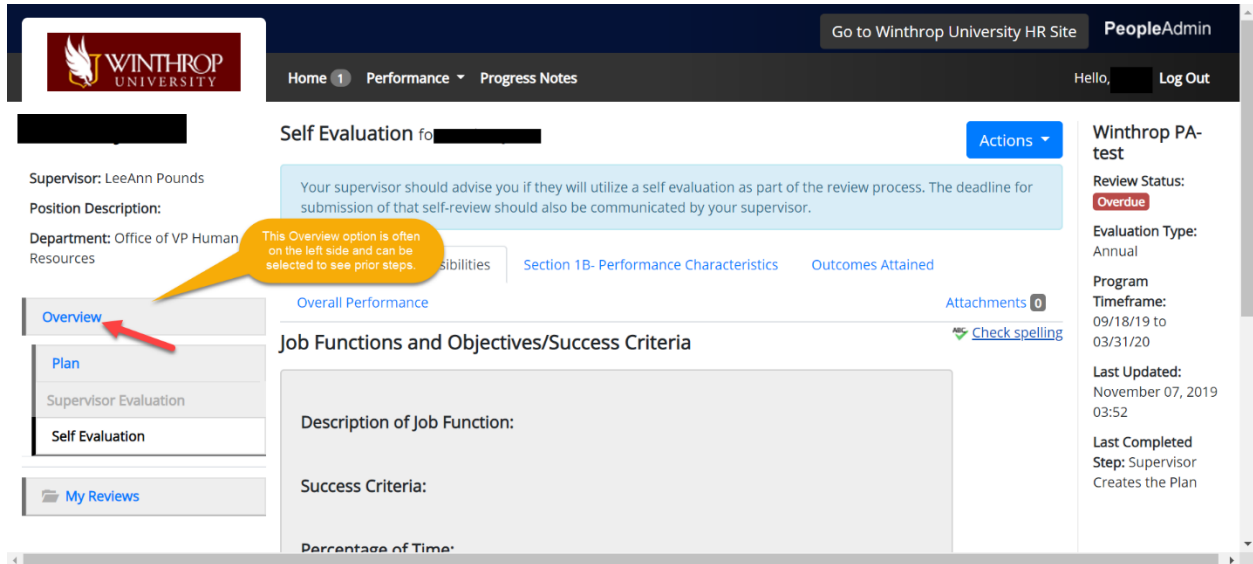


SCREENSHOT #1D

2. NAVIGATION BETWEEN STEPS: Instructions are provided in the blue background text box in the center of each screen.

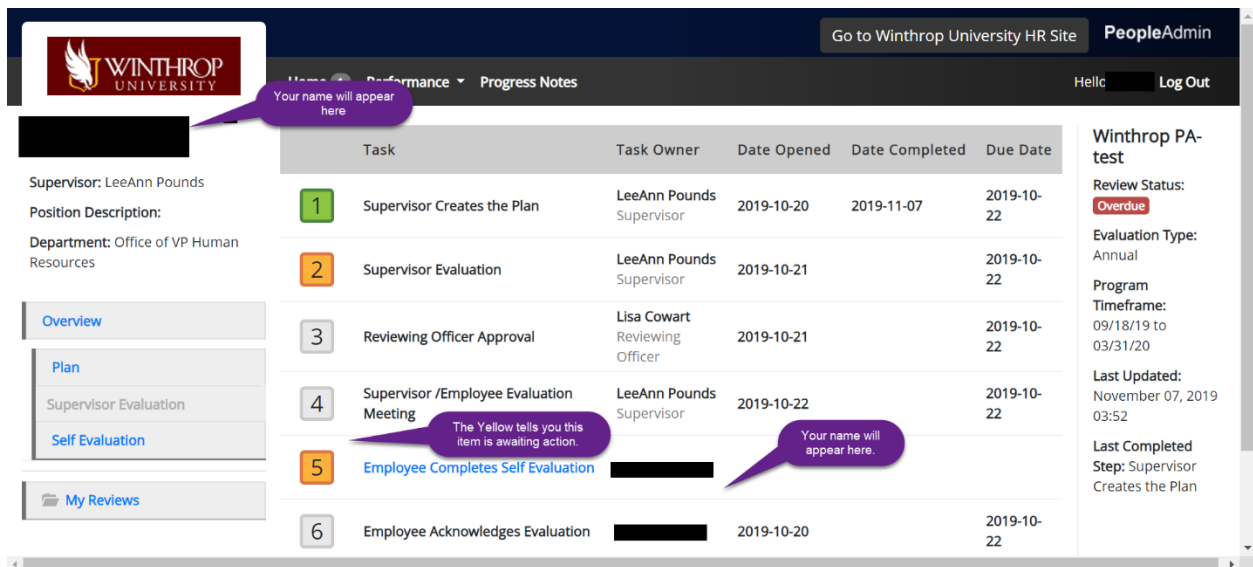
2A. At any time you are in any action item or when selecting “My Reviews” (in the future once evaluations are complete), you can see your planning document or all the steps in the process, by selecting “Overview” on the left column once you are in an action item.

SCREENSHOT #2A



2B. Once in Overview, the orange numbered boxes show tasks available and awaiting action by the person listed as the Task Owner. Green indicates the task is complete.

SCREENSHOT #2B



2C. There is an option (not required) to save comments, emails, or information for use in your self-evaluation or to support comments on a supervisor evaluation. You can select “Create Progress Notes” which will provide a drop down menu with a series of options, including whether to provide an attachment and whether to make note viewable to your supervisor. This works like a digital file cabinet.

SCREENSHOT #2C

3. HOW AN EMPLOYEE ACKNOWLEDGES A PLAN:

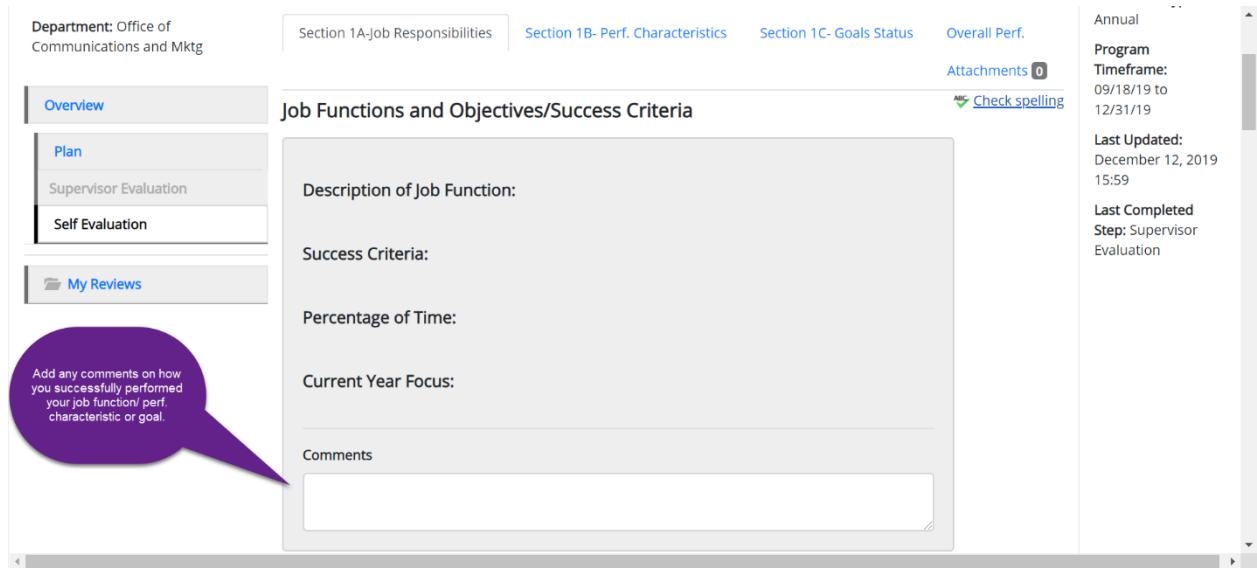
After a supervisor drafts a plan showing their expectation for your job performance, the employee can click on that step or action item and scroll down to the comment box where there is two buttons at the right side of the final screen. The employee can then type any comments in the box and select the “Acknowledge” button or “Dispute” button, if there is an expected error.

SCREENSHOT #3

4. HOW TO COMPLETE A SELF EVALUATION, IF ASSIGNED BY YOUR SUPERVISOR:

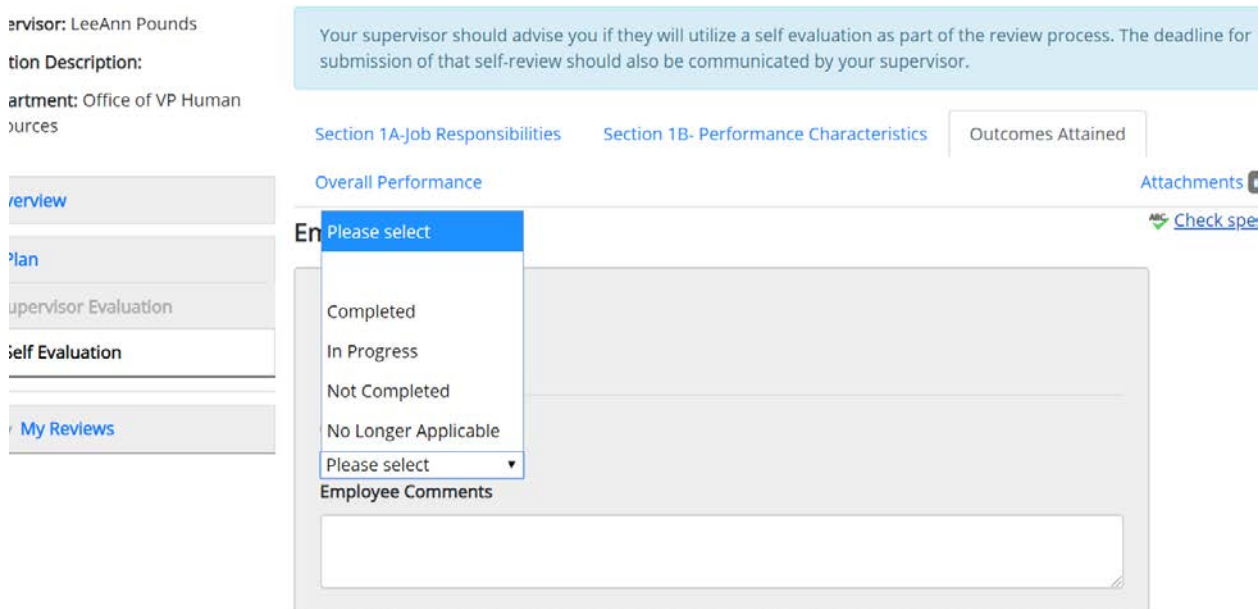
4A. If your supervisor assigned you a Self-Evaluation, select that action item on your personal launch page (Screenshot #1D) or click on the “Overview” button (SCREENSHOT #4A) then add comments in Section 1 as to your completion of job functions and performance characteristics. Below the blue box are four tabs that allow you to move between sections of the document. There is a spell check option to the right.

SCREENSHOT #4A



4B. If a goal is identified by your supervisor, the employee is to select whether or not they feel it was completed, in progress, not completed or no longer applicable and provide comments.

SCREENSHOT #4B



4C. Once you complete all the text boxes desired to submit to the supervisor, you hit the "Complete" button at the bottom right of your screen. If you need to leave this screen at any time or get interrupted, hit the button "Save Draft" to allow further additions or review by you. Notify your supervisor the self-evaluation is complete.

5. HOW TO ACKNOWLEDGE MY EVALUATION:

The most common task will be to acknowledge your evaluation by the supervisor:

5A. Click either the action item on your personal launch page (Screenshot #1D) or on the box with orange and blue words saying "Employee Acknowledges Evaluation" in your "Overview" (Screenshot #5A). You will then be taken into the evaluation completed by your supervisor.

SCREENSHOT #5A

The screenshot displays the PeopleAdmin interface for a performance evaluation. The main content area features a table with the following data:

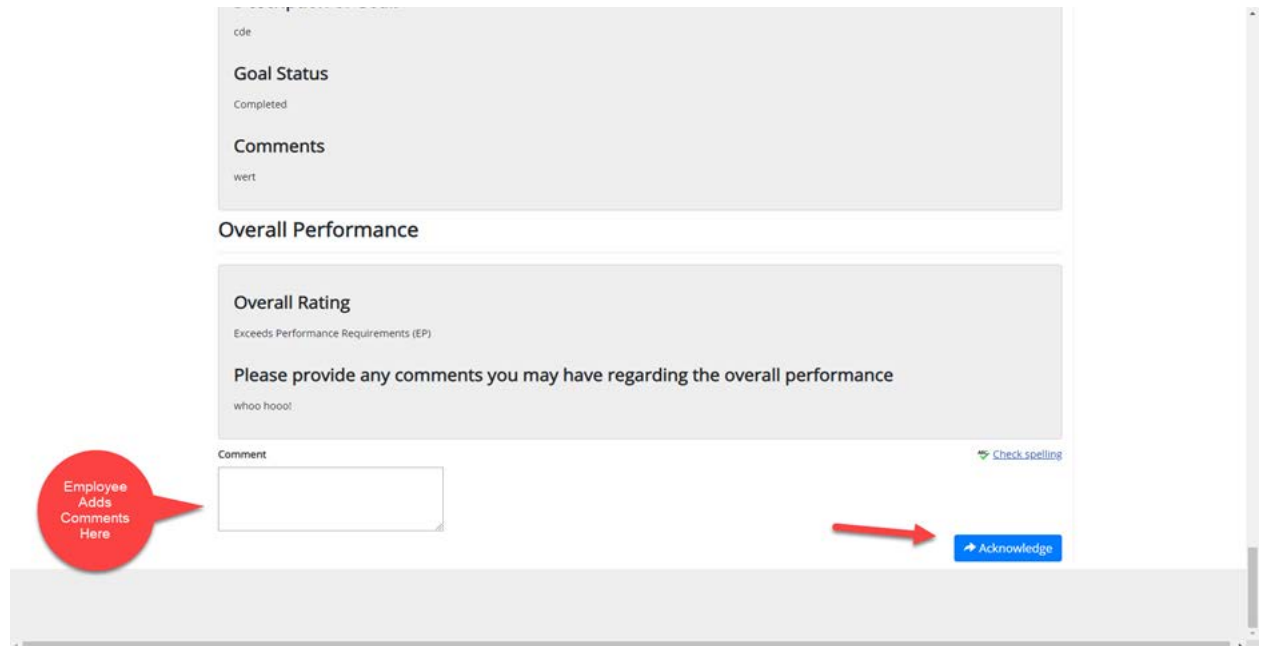
Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates the Plan	System Account Supervisor	2019-10-20	2019-11-13	2019-10-22
2 Employee Completes Self Evaluation	[Redacted]		2019-11-13	
3 Supervisor Evaluation	System Account Supervisor	2019-10-21	2019-11-13	2019-10-22
4 Reviewing Officer Approval	[Redacted]	2019-10-21	2019-12-09	2019-10-22
5 Supervisor /Employee Evaluation Meeting	[Redacted] Supervisor	2019-10-22	2019-12-09	2019-10-22
6 Employee Acknowledges Evaluation	[Redacted]	2019-10-20		2019-10-22

On the right side of the interface, a summary panel provides the following details:

- Review Status: **Overdue**
- Overall Rating: Exceeds Performance Requirements (EP)
- Evaluation Type: Annual
- Program Timeframe: 09/18/19 to 03/31/20
- Last Updated: December 09, 2019 10:02
- Last Completed Step: Supervisor /Employee Evaluation Meeting

5B. You can read your full evaluation by scrolling down, and on the final page add any comments first before hitting any button. Then hit the blue “Acknowledge” Button and the process is complete. Acknowledgement by an employee means they had the opportunity to review the evaluation and does not signify agreement by the employee with the ratings and/or comments.

SCREENSHOT #5B



The screenshot displays a performance evaluation interface. At the top, there is a grey box containing the text "cde", "Goal Status", "Completed", and "Comments" with the text "wert" below it. Below this is the "Overall Performance" section, which includes an "Overall Rating" of "Exceeds Performance Requirements (EP)" and a prompt: "Please provide any comments you may have regarding the overall performance" with the text "whoa hoo!" below it. A "Check spelling" link is visible to the right of the comment prompt. At the bottom of the form, there is a "Comment" label above a text input field. A red callout bubble on the left side of the input field contains the text "Employee Adds Comments Here". A red arrow points from the right side of the input field to a blue "Acknowledge" button located at the bottom right of the form.