WINTHROP UNIVERSITY

Supervisor Guide for Using the New Staff Performance Evaluation System in PeopleAdmin

May 17, 2022

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SUPERVISOR GUIDE FOR USING THE
NEW STAFF PERFORMANCE EVALUATION SYSTEM
IN PEOPLE ADMIN

This new online platform launched January 2020 automates all parts of the performance management process by:

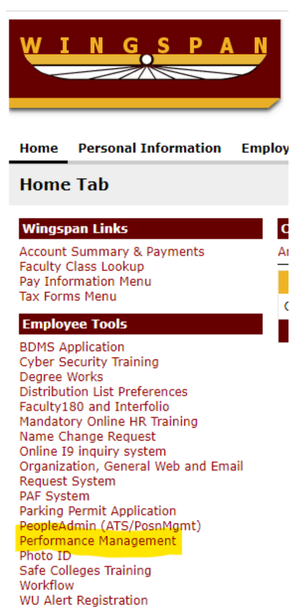
- Integrating the most up to date information on position descriptions into the draft planning document;
- allowing that planning document information to be available and built on as part of the supervisor's review;
- allowing the supervisor's discretion to assign a self-review tool and
- including added flexibility of optional features to add goals, comments relating to performance characteristics, maintain online progress notes and attach emails or other documents as examples in a performance management process.

How do I Log into the People Admin Performance Portal?

1. Sign in to Wingspan (See Screenshot 1 below)

   1a. Under "**Employee Tools**" select "Performance Management "

SCREENSHOT #1



2. You may or may not see this screen and have to provide your WU login credentials a second time (using the same as when you log in to a campus computer – including Winthrop.edu):

SCREENSHOT #2

3. Next you will be taken to the Launch Screen of People Admin (See Screenshot #3 below)

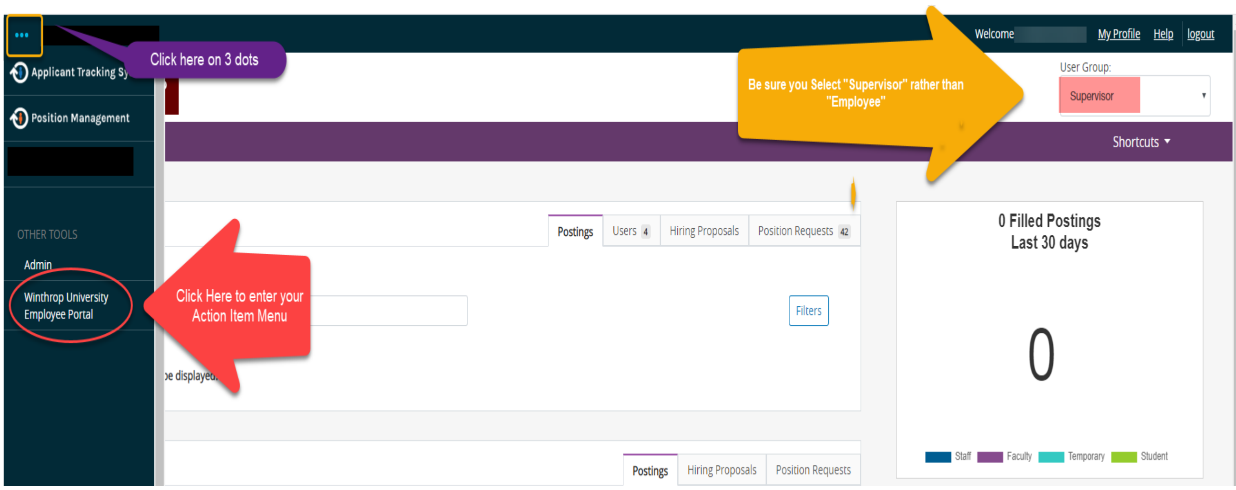
   3a. On the User Group to the Right (just under your name) – click on the down button for the pulldown

   3b. Select “Supervisor” as to User Group:

   3c. At the top left corner, right click on the three blue ellipse/periods 

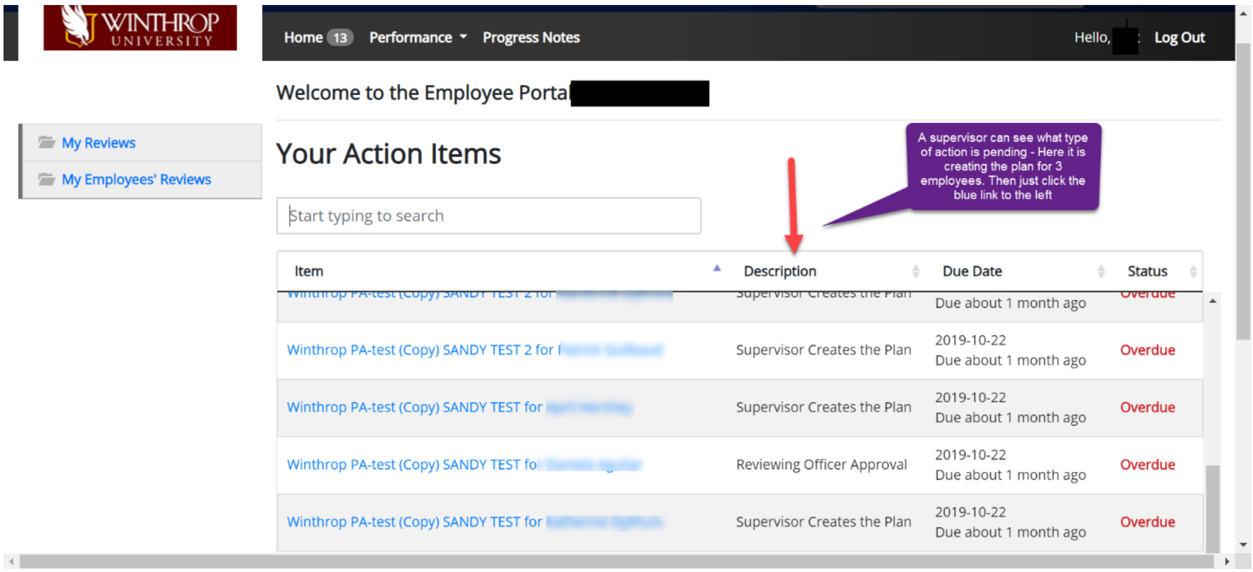
   3d. Then select “**Winthrop University Employee Portal**”

SCREENSHOT #3



4. This will take you to your personal launch page (see Screenshot #4 below) with your personal available action items shown. This screen shows your current action items. The employee's name is listed in the first column and the action to be performed is listed in the "description" column. For your own review, you will tab on the left to "My Reviews" (only populated when your 2020 review is awaiting your input). You can go back to seeing action items for the reviews of those who report to you by selecting the left tab "My Employees' Reviews."

SCREENSHOT #4



5. FIRST STEP WITHIN ANY PERFORMANCE MANAGEMENT PROCESS – Create a Plan

No evaluation can be completed without a supervisor first creating a Plan (previously referred to as a "planning stage document") inside People Admin.

For all types of reviews in the new system, a supervisor must start by selecting the blue link in the Item column for the employee where it lists the task of "**Supervisor Creates the Plan.**"

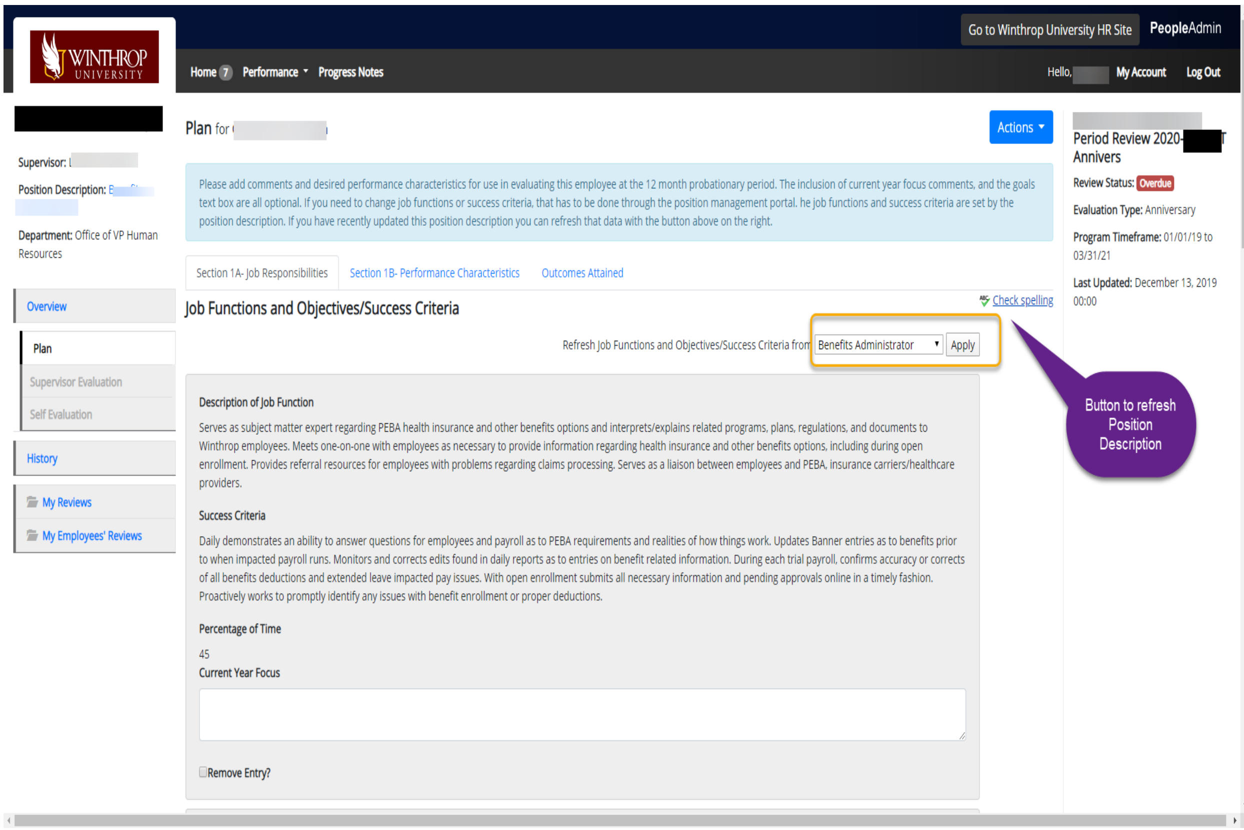
In most cases, when a supervisor opens the employee's plan, they will find the following pre-populated:

- the job functions,
- success criteria (from prior evaluations completed in old system) and
- the percentage of time dedicated for each job function

All this information is pulled in from the position description information (Position Management module) and pre-populated in a read-only format in the plan.

If you update a position description (with HR's approval) after opening this Plan or the employee has transferred to a new position, you can hit the button on the top middle to refresh the planning stage document with the updated position description.

SCREENSHOT #5



A Plan can be revised by the Supervisor, without HR involvement up to the time a self-evaluation (optional) or supervisor evaluation is started. After that point, HRhelp@winthrop.edu or (803)323-2273 must be contacted to "unlock" the plan for the supervisor.

WHAT IF THERE IS NO JOB FUNCTIONS, SUCCESS CRITERIA OR PRECENTAGES PRE-POPULATED?

If the job functions, success criteria and percentage of time do not appear automatically in the plan, then you have to first submit a proposed position description, success criteria and percentages of time to HR for approval by using the "MODIFY POSITION DESCRIPTION" process – contact HRhelp@winthrop.edu . If there is no position description information of any type, you must contact HRhelp@winthrop.edu and develop a complete position description approved by HR, prior to the supervisor having any ability to create a planning document or performance review of the employee.

The creation of a plan involves:

5a. Review of the job functions, success criteria and percentage of time allocated to function and confirm it accurately reflects the current job – If not, utilize the MODIFY POSITION DESCRIPTION process described by HR.

5b. **"Current Year Focus"** is a new entry provided in the planning document to provide supervisors the option of adding any specific focus areas or instructions related to the upcoming year. This option has to be utilized as part of the planning document and cannot be revised or edited by the supervisor once the evaluation has been started, except by contacting HR and having the system to suspend the evaluation and any intermediary steps completed after the planning stage document. (During the evaluation process, any added "current year focus" will appear on the evaluation, but cannot be changed by the supervisor. There will still be a comment section on the evaluation form relating to each job function for a supervisor to add comments.)

5c. **Performance Characteristics [NOW REQUIRED AT PLAN STAGE]:** The planning document offers the same type of drop down system that the prior system provided. The supervisor is to indicate (yes or no) as to whether the employee is a supervisor of other employees. **If the employee being reviewed is a supervisor, there are two required performance characteristics** to be selected for all supervisors that must be selected – diversity efforts and timely completion of performance reviews of subordinates. Otherwise, it is at the discretion of the supervisor what performance characteristic to select to review on as long **as at least two performance characteristics** is selected for every employee.

5d. **Definition of Expectations [OPTIONAL]:** is a new entry provided in the planning document to allow supervisors the option of adding specifics of their expectations for the upcoming months in relation to the performance characteristic selected for the planning document. This is recommended, but not required. At the time of the evaluation, any definition of expectations will appear on the form as read only, with an additional comment section under each performance characteristic for the supervisor to discuss the demonstration of that performance characteristic, or lack of demonstrating such a work demeanor in the past months.

5e. **Outcomes Attained/Goals Section [NEW and OPTIONAL]:** The planning document now provides an **optional** entry for supervisors to add a "description of goals" to allow individual, department or division goals for an upcoming project or focus to be defined that are unique or part of a current strategic initiative and not reflected in the ongoing job functions and success criteria.

This "description of goals" has to be added at the time of creation of the planning document, and cannot be added at the time of completion of the evaluation. When a supervisor is completing the <u>evaluation</u>, they can address any goal added by providing information in a text box provided for "Goal status."

The supervisor may select at the bottom of each screen of the Plan from the buttons:

- "Save Draft" or
- “Next” or
- “Complete” on the final screen.

All these options will save the information entered. In a regular timed process of 6 or 12 months (not occurring for reviews due 3/31/20 or before), a supervisor would print out the plan if selecting the “Save Draft” option and meet to review this plan with the employee and make any necessary revisions after the meeting and then select “Complete.” Alternatively, the supervisor could select “Complete” for the Plan and notify the Employee to Log in to the Portal and check it under the “Overview” tab. In either case, after the Supervisor and Employee discuss the Plan the employee would go under My Review and Acknowledge the Plan.

With the late year implementation of this system for reviews due in the first quarter of 2020, we anticipate the plan should mirror what was completed in the prior Wingspan system or other information provided previously to the employee as to performance expectations. Therefore the system does not require an acknowledgement of the plan by the employee for the 2020 review programs.

The system will send an initial email to prompt the supervisor to create a Plan. The Plan can be created within a few days of an employee beginning their job. No other prompting emails will be sent by the system until the plan is done or the evaluation process is ending.

The same occurs for notification as to all required steps – once prompted, the deadlines are not set until the end of the review period and no future steps trigger emails until the current step is complete.

NEXT STEP IN PERFORMANCE MANAGEMENT PROCESS - Either:

6. Notify the Employee to Complete a Self-Evaluation and Provide a deadline 10-21 days before you plan to work on the Supervisor Evaluation Form [Optional]. Instructions for an Employee’s completion of the Self Evaluation are included in Instructions for Employee to Access Documents in the Performance Area of People Admin, page 5 on the HR Webpage.

OR SKIP TO STEP #7

7. Anytime between January and March 31, complete the Supervisor Evaluation if no Self Evaluation is being utilized (at Supervisor’s discretion). To complete a Supervisor Evaluation, log in as described on pages 1 and 2. In the Item column, click the link for the employee with a description of Supervisor Completes the Evaluation. Then scroll through the document (with information from the Plan pre-populated as Read Only). A link entitled EPMS Rating Guide (just above the title “**Job Functions and Objectives/Success Criteria**” provides an explanation of the five rating levels (unchanged from 2019):

   7a. On the First Section assign a rating and add a comment (required) on each job function, including the 5% job function “perform other duties as assigned.” Not Applicable is an option for the “perform other duties as assigned” function if the employee was not required to engage in additional duties not described elsewhere this year. Even if N/A is selected for "perform other duties as assigned" some text must be entered in the comment box.

7b. In the Second Section, add a rating (Satisfactory or Unsatisfactory) on each Performance Characteristic. Comments are optional. No new Performance Characteristic can be added to the Evaluation without assistance from HR to undo prior steps. All intended performance characteristics should be included in the Plan. Although Not Applicable is a rating option, it should not be utilized in this section without consultation with HR.

7c. In the Outcomes Attained section (Optional), if your plan listed a goal, add a progress rating under the Goal Status section (with options of Complete, In Progress, Not Completed) and comment.

7d. In the Final section, add an overall rating and a comment. This section is very important and should represent the averaging of the ratings in section 1a, with a mandatory explanatory comment added.

7e. Then hit blue button at the end to "Save Draft" or "Complete" when ready to make the evaluation final.

All text boxes with a red asterisk are "required" to move forward. Any sections with a lock icon are read only and can only be modified with the assistance of HR.

NEXT STEP AFTER SUPERVISOR'S EVALUATION COMPLETED:

The Reviewing Officer's process is next and described below on pages 8-9 for those supervisors serving in that dual role.

NEXT STEP AFTER REVIEWING OFFICER'S APPROVAL:

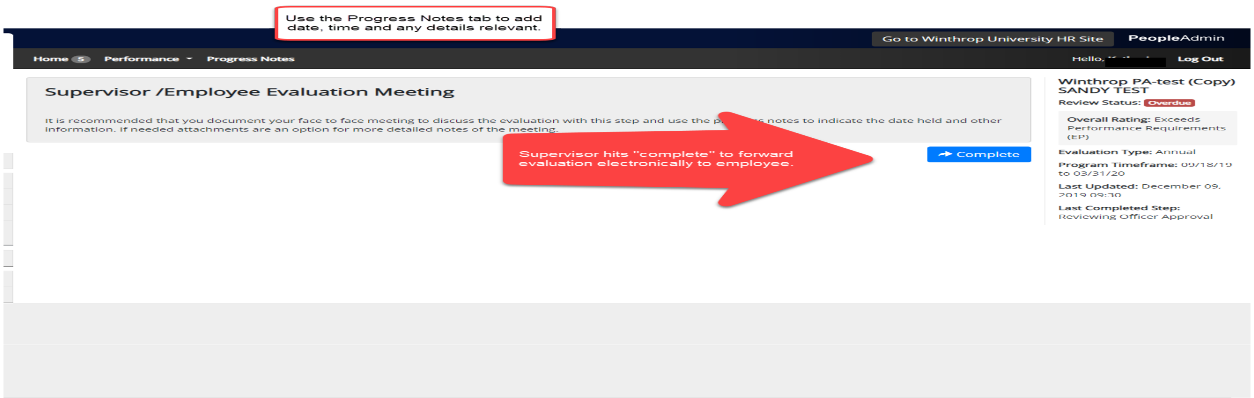
For the Meeting with the Employee:

- After the reviewing officer approves the supervisor's evaluation, then the supervisor is to conduct a meeting with the employee to review the evaluation (by printing out a hard copy or printing to a PDF document and emailing it to them). There is no employee view option on the People Admin system until after the meeting is complete.
- After the meeting occurs, go into the system make a note in Progress Notes (located just to right of Winthrop logo)

SCREENSHOT #6

List the time and date of the meeting and any other important details, then after saving the Progress Notes, select the “Complete” button shown in Screenshot #7 below.

SCREENSHOT #7

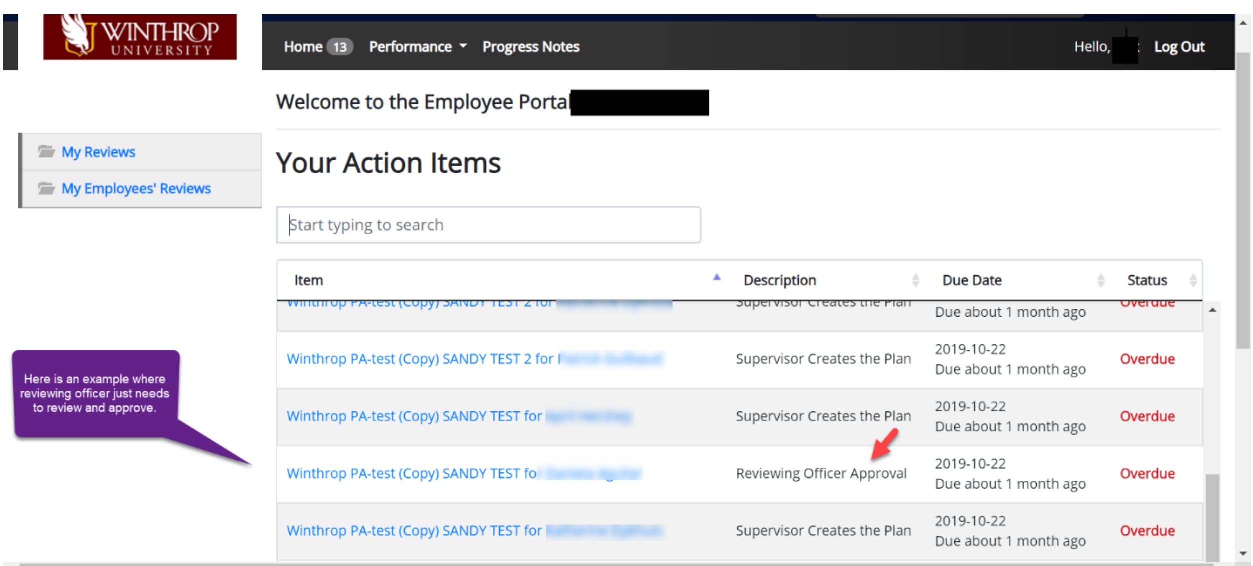


Now the evaluation will be routed to the employee for Acknowledgement. For instructions, see Instructions for Employee to Access Documents in the Performance Area of PeopleAdmin, pages 6-7.

REVIEWING OFFICER ROLE:

As a second level supervisor, the reviewing officer’s only action item is to approve the supervisor’s evaluation of the employee.

SCREENSHOT #8



Once the reviewing officer clicks on the link provided in their Action Items list under "Item." Then they scroll through and at the bottom under the Overall rating area have the opportunity to:

- Add comments only seen by the supervisor; and
- Select Approve to move the evaluation forward to a meeting by the supervisor to share the evaluation results with the employee; or
- Return the evaluation to the supervisor, by selecting the "Return" button for review by the reviewing officer.

The system can take up to 24 hours to create a notifying email, but access should be available to the reviewing officer within an hour.

SCREENSHOT #9: The area for the Reviewing Officer to comment and return or approve a Supervisor's Evaluation of an employee.