Welcome to the PeopleAdmin Performance Management module! Performance Management provides functionality allowing SHSU to process all performance appraisals for staff employees online. Paper forms are no longer used for employee appraisals.

Performance Management provides electronic storage of appraisals. You will easily be able to access your employee’s reviews in the future. The system will also allow you to track the progress of your appraisals and provide dashboard indicators for data review.

There are eight staff employee Annual Performance Appraisal programs established to relate more directly to the responsibilities associated with each employee’s position. In addition to the Annual Performance Appraisal programs, there is an Optional Employee Self-Assessment program supervisors may ask employees to complete as part of the evaluation process. The Employee Self-Assessment is required for the Administrator review.

- **Professional** Annual Performance Appraisal - for all professional positions
- **Tech/Para-Professional, and Clerical** Annual Performance Appraisal - for all technical para-professional, clerical and secretarial positions
- **Service Maintenance/Skilled Craft** Annual Performance Appraisal - for all service maintenance and skilled craft positions (building maintenance related areas, etc.)
- **Administrator** Annual Performance Appraisal - for executive and administrative positions (e.g., Assistant/Associate Deans, Deans, Directors, Assistant/Associate Vice Presidents, Vice Presidents, etc.)
- **Police** Annual Performance Appraisal - for the Police Officer, Sergeant and Supervisor positions
- **Nursing** Annual Performance Appraisal – for the professional nursing positions
- **Physician A.P.A.** – for the physicians at the Student Health Center
- **Nurse Practitioner/Physician’s Assistant** – those in the NP/PA specialty field

This tutorial, designed for those individuals who will be completing appraisals on another employee, will guide you through the process. A separate Job Aid has been created to assist your employees in completing the Optional ‘Employee Self-Assessment’ or ‘Acknowledge’ their annual review.

To complete an Annual Performance Appraisal for one of your employees, please complete the following steps.

**Step One:** Access Performance Management from the My Sam Human Resources channel.
Step Two: Navigate to the ‘Employee Portal’ by clicking on the link indicated below.

NOTE: This is the time to direct your employee to complete the ‘Optional Self-Assessment’ program if you want to use it. A separate job aid to assist the employee with this function has been created and is available on the Human Resources website.

Step Three: The system will bring you to your ‘Welcome’ page where you will see a listing of your employees and what step of the process each employee is in. If you do not see this page, click on the ‘Home’ icon in the upper left portion of your screen, which will take you to the screen pictured below.

Complete the supervisor evaluation. From the ‘Your Action Items’ screen, select the employee you want to evaluate. Under the ‘Description’ column, click on ‘Complete Supervisor Evaluation’.
Step Four: Proceed through each of the ‘Appraisal Factors’ by selecting a rating from the drop-down box immediately below the appraisal factor. An ‘Observation’ text box has been included under each appraisal factor to include comments. Your appraisal factors could be different than the one indicated below depending upon the appraisal program being used. The screen shots in this tutorial are from the Tech/Para-Professional, and Clerical Annual Performance Appraisal program. Attachments can also be included in the evaluation.
Please be sure to complete all sections of the evaluation on this screen. The last section is the ‘Overall Evaluation’. Sum the individual appraisal factor ratings. The sum of the appraisal factor ratings should be in the rating range listed for the overall evaluation rating indicated. If an overall rating is indicated that is outside of the stated range, please provide a justification of the rating in the area provided. Once you have completed the Supervisor Evaluation and included any desired attachments, scroll to the bottom of the page and click on the ‘Complete’ button to finalize the appraisal.

**CAUTION:** Once you have selected the ‘Complete’ option, you will not be able to make any changes to your evaluation.
**Step Five:** The screen below appears noting that you have completed the supervisor evaluation.

Notice in the screen shot above, the system indicates that the next step is ‘Complete Self Evaluation’. If you had instructed your employees to complete the self-evaluation prior to your evaluation, the system would indicate that the next step is ‘Review Meeting’.

**Step Six:** The next step in the annual performance review process is for you to meet with the employee and discuss their appraisal. Once this meeting has occurred, you will need to log back into the PeopleAdmin Performance Management system and acknowledge that this review meeting has taken place (Steps 1 – 3).

Hover over the employee’s name. In the description column you should see the status of ‘Review Meeting’ for this employee.
**Step Seven:** Click on ‘Review Meeting.’

You will then be directed to the screen below. To acknowledge that the review meeting has occurred with the employee, click on the ‘Complete’ button below the instructional text.

This is also a good time to include any progress notes you may want to incorporate with the employee’s annual performance appraisal. To record any progress notes, click on the ‘Progress Notes’ tab listed along the left side of the screen.

**Step Eight:** You have now successfully completed the supervisor’s portion of the 2015 Annual Performance Appraisal for this employee. Please ask your employee to log into the Performance Management system and acknowledge that they have received the appraisal. A separate Job Aid to assist the employee with this acknowledgment can be found on the Human Resources webpage.

Once the employee has logged in and acknowledged receiving the appraisal, the Annual Performance Appraisal review is complete for this employee.

Please repeat this process for each of your subordinate employees.

If you encounter difficulties, please call Cindy Bradfield in Human Resources at 4-2329.