

## PEOPLEADMIN PERFORMANCE APPRAISAL PROCESS – SUPERVISOR ROLE

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Welcome to the University of Dayton Online Employment and Performance Management System. The Human Resources department has implemented this system in order to automate many of the paper-driven aspects of the employment application process, position management, and performance appraisals.

You will use this system to:

1. Review Position Description
2. Review Postings
3. Search and Review Applicants
4. Communicate electronically with HR Administrators, Hiring Managers, Applicants, and others involved in your hiring process
5. **Perform Performance Evaluations on Employees**

The HR department has provided these training materials to assist with your understanding and use of this system.

### Your Web Browser

The Employment Application System is designed to run in a web browser over the Internet. The system supports browser versions of Netscape 4.7 and above and Internet Explorer 4.0 and above. However some of the older browser versions are less powerful than newer versions, so the appearance of certain screens and printed documents may be slightly askew. Please notify the system administrator of any significant issues that arise.

The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at [www.Adobe.com](http://www.Adobe.com).

It is recommended that you do not use your browser's "Back", "Forward" or "Refresh" buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.

The site is best viewed in Internet Explorer 5.5 and above.

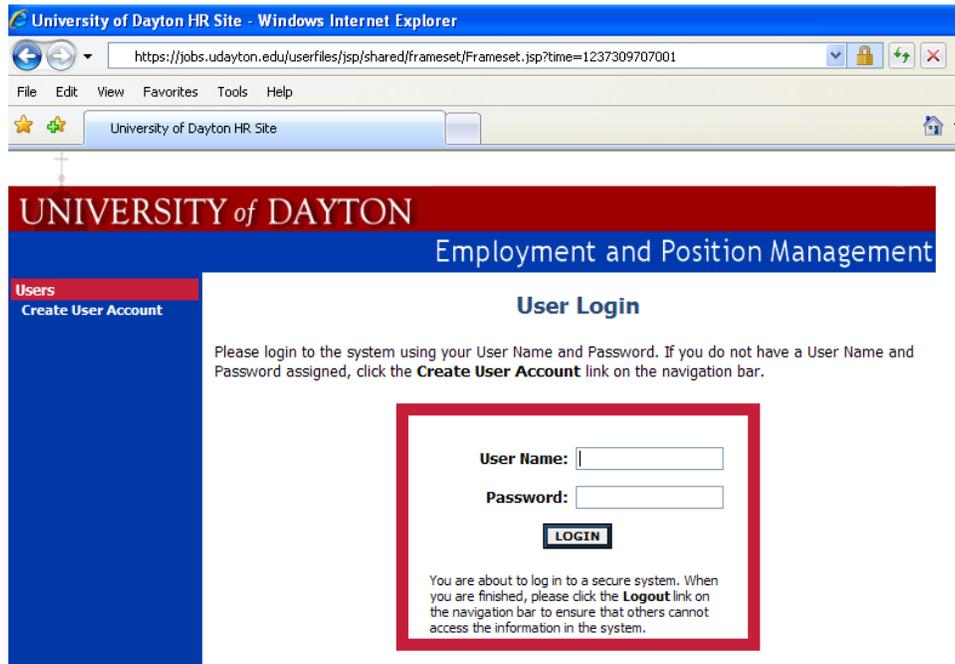
### Security of Data

To ensure the security of the data **the system will automatically log you out after 60 minutes if it detects no activity**. However, anytime you leave your computer we strongly recommend that you save any work in progress and Logout of the system by clicking on the logout link located on the bottom left side of your screen.

## GETTING STARTED

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After entering the URL [jobs.udayton.edu/hr](https://jobs.udayton.edu/hr) in your browser, the “login screen” for the system will appear and should be similar to the following screen:



The screenshot shows a Windows Internet Explorer browser window with the title "University of Dayton HR Site - Windows Internet Explorer". The address bar contains the URL <https://jobs.udayton.edu/userfiles/jsp/shared/frameset/Frameset.jsp?time=1237309707001>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The address bar shows "University of Dayton HR Site".

The main content area features a red header with "UNIVERSITY of DAYTON" and a blue header with "Employment and Position Management". A left navigation bar is labeled "Users" and contains a link for "Create User Account". The main heading is "User Login".

The login instructions state: "Please login to the system using your User Name and Password. If you do not have a User Name and Password assigned, click the **Create User Account** link on the navigation bar."

The login form is enclosed in a red border and contains the following fields and buttons:

- User Name:
- Password:
- 

Below the form, a security notice reads: "You are about to log in to a secure system. When you are finished, please click the **Logout** link on the navigation bar to ensure that others cannot access the information in the system."

Log in using your Novell network user name and password. This is the same user name and password you use to purchase your parking pass on line if you are located on campus. If you do not remember these credentials, you may contact the Udit Help desk at 229-3888. The help desk will require the last 4 digits of your social security number in order to give you the user name and password information.

## PERFORMANCE APPRAISAL ACTIONS

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Be sure you are logged in as a Hiring/Manager/Supervisor. Your role is displayed with your name at the top of the screen. If you are not, you can change your role by selecting the “Change User Type” option on the left-hand navigation bar. To begin a performance evaluation as a hiring manager/supervisor, click on the “Begin New Evaluation Link” on the left-hand navigation bar.



Click on **Start Action** under the “Performance Appraisal Research Personnel” option on the menu.



A list of employees who report to you will display as follows:

- Job Postings**
- Active Postings
- Pending Postings
- Historical Postings
- Search Hiring Proposals
- Position Descriptions**
- Begin New Action
- Search Actions
- Pending Actions
- Search Positions
- Evaluations**
- Begin New Evaluation
- Active Evaluations
- Historical Evaluations
- Admin**
- Home
- Change User Type
- Logout

Welcome **Linda Nianouris**. You are logged in.  
 Your Current Group:Hiring Manager/Supervisor. Tuesday, March 17, 2009

**Performance Appraisal Research Personnel**

Choose Position to Evaluate

6 Records

<input checked="" type="checkbox"/> Classification Title	<input checked="" type="checkbox"/> Working Title	<input checked="" type="checkbox"/> Class Code	<input checked="" type="checkbox"/> Division	<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Employee Id	<input checked="" type="checkbox"/> Employee Last Name	<input checked="" type="checkbox"/> Last Action
<b>Administrative Secretary</b> Start Action   View Summary	Administrative Secretary & Receptionist	U007	Human Resources - HDK	Human Resources - HDK - U1120	2710835	Duffy	Position Description Template in System (Needs Update)
<b>Administrative Assistant</b> Start Action   View Summary	Personnel Data Specialist	U004	Human Resources - HDK	Human Resources - HDK - U1120	0129953	Furcon	Position Description Template in System (Needs Update)
<b>Sr Administrative Assistant</b> Start Action   View Summary	Personnel Data Analyst	U186	Human Resources - HDK	Human Resources - HDK - U1120	2259879	Mantia	Modified Position Description Approved
<b>Sr Secretary</b> Start Action   View Summary	Sr Secretary	U196	Human Resources - HDK	Human Resources - HDK - U1120	2168170	Mukaneza	Position Description Template in System (Needs Update)

To initiate the process, click on **Start Action** below the Classification Title and the following screen will appear. There are links across the top of the evaluation form that you can use to navigate through the form or you will also see a link that reads "Continue to the Next Page." Navigate to the "Evaluation Details Tab."

UNIVERSITY of DAYTON  
 Employment and Position Management

Welcome **Linda Nianouris**. You are logged in.  
 Your Current Group:Hiring Manager/Supervisor. Wednesday, March 18, 2009

**Create Performance Appraisal Research Personnel - Administrative Secretary & Receptionist**

Current Job Description	Evaluation Details	Prior Year Goals & Evaluation	Future Goals	Additional Appraisal Comments	Attach Documents	Post Appraisal Comments
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Employee Details	
Employee First Name:	Monica
Employee Last Name:	Duffy
Employee ID Number:	2710835

Classification Details	
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To initiate a system generated email to the employee to begin the self-evaluation part of the performance appraisal, you will need to complete the following fields:

- Evaluation Cycle
- Evaluation Cycle Begin Date
- Evaluation Cycle End Date
- Other Users in Department Who Need Access to this Evaluation
- Appraisal Completed by
- 2<sup>nd</sup> Level Supervisor

When selecting the “Other Users in Department Who Need Access to this Evaluation,” the names in the list are only those who also have the role of “Hiring Manager/Supervisor” within your department. If you intend for others to be able to see this performance appraisal action, you will need to move their name to the “Selected” box on the form. Always be sure to move your own name to the “Selected” box. To initiate a system generated e-mail to the employee to start their self-appraisal, click on the link at the bottom of this page titled “Preview Evaluation.” When the employee receives this notification to perform their self-evaluation, they will not be able to edit the “Evaluation Details” or their “Current Job Description.” Editing the “Current Job Description” is done through a different process.

- Job Postings**
- Active Postings
- Pending Postings
- Historical Postings
- Search Hiring Proposals
- Position Descriptions**
- Begin New Action
- Search Actions
- Pending Actions
- Search Positions
- Evaluations**
- Begin New Evaluation
- Active Evaluations
- Historical Evaluations
- Admin**
- Home
- Change User Type
- Logout

Employee First Name:	Monica		
Employee Last Name:	Duffy		
Evaluation Working Title:	Administrative Secretary & Receptionist		
Classification Title:	Administrative Secretary		
Evaluation Cycle:	Annual <input type="button" value="v"/>		
Evaluation Cycle Begin Date:	04/01/2008	MM/DD/YYYY -or- MM-DD-YYYY	
Evaluation Cycle End Date:	03/31/2009	MM/DD/YYYY -or- MM-DD-YYYY	
Employee Account Name:	Duffy, Monica <input type="button" value="v"/>		
Department:	Human Resources - HDK - U1120		
Division:	Human Resources - HDK		
Other Users in Department Who Need Access to this Evaluation:	Not Selected Burkhardt, Thomas Dodaro, Mary Duwel, Jennifer HR, UDayton Molnar, Kathleen Perry, Jean Schwartz, Elizabeth This, Karil <input type="button" value="v"/>	<input type="button" value="&gt;"/> <input type="button" value="&lt;"/> <input type="button" value="&gt;&gt;"/> <input type="button" value="&lt;&lt;"/>	Selected Carter, Joyce Nianouris, Linda
Appraisal Completed by:	Linda Nianouris		
2nd Level Supervisor:	Carter, Joyce <input type="button" value="v"/>		

\*Required information is denoted with an asterisk.

<< RETURN TO PREVIOUS

CONTINUE TO NEXT PAGE >>

CANCEL

PREVIEW EVALUATION

Click on the radio button next to “Send to Employee for Self Evaluation,” then the “Continue” button. Note the blue word “Edit.” If you decide you want to edit your work, you can do so by clicking on this link.

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Employment and Position Management

• Welcome **Linda Nianouris**. You are logged in. Wednesday, March 18, 2009  
Your Current Group:Hiring Manager/Supervisor.

### View Performance Appraisal Research Personnel Summary - Administrative Secretary & Receptionist

To change the status of this action, choose from the statuses below:

[Edit](#)  Printer-Friendly Version

**Evaluation Status**

Save Without Submitting  
 Send to Employee for Self Evaluation

**CANCEL** **CONTINUE**

**Evaluation Details**

Employee First Name:	Monica
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You will be asked to confirm your decision.

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Employment and Position Management

• Welcome **Linda Nianouris**. You are logged in. Wednesday, March 18, 2009  
Your Current Group:Hiring Manager/Supervisor.

### Confirm Change Evaluation Status

You are about to change this action to the following status:

**Evaluation Status**

Send to Employee for Self Evaluation

**GO BACK** **CONFIRM**

You will receive a notice that the performance appraisal has been initiated.

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Employment and Position Management

Job Postings  
Active Postings  
Pending Postings  
Historical Postings  
Search Hiring Proposals  
Position Descriptions  
Begin New Action  
Search Actions  
Pending Actions  
Search Positions  
Evaluations  
Begin New Evaluation

Welcome **Linda Nianouris**. You are logged in.  
Your Current Group:Hiring Manager/Supervisor. Wednesday, March 18, 2009

### Search Active Evaluations

✓ The status of Evaluation *Administrative Secretary & Receptionist* has successfully been changed to *Sent to Employee for Self Evaluation*.

You will need to do this for **each** employee who reports to you.

### COMPLETING THE SUPERVISOR'S PORTION OF THE EVALUATION

The employees will complete their self evaluation and you will receive a system generated e-mail from each employee as they complete their part. In order to complete the supervisor's assessment of the appraisal, select the link titled "Active Evaluations" from the navigation bar on the left hand side of the screen. A list of all the active evaluations will display. Click on "View" to open an evaluation to do your work. Note the "Status" column. This tells you the status of the evaluation for each evaluation that you have initiated.

**UNIVERSITY of DAYTON**  
Employment and Position Management

Job Postings  
Active Postings  
Pending Postings  
Historical Postings  
Search Hiring Proposals  
Position Descriptions  
Begin New Action  
Search Actions  
Pending Actions  
Search Positions  
Evaluations  
Begin New Evaluation  
Active Evaluations  
Historical Evaluations  
Admin  
Home  
Change User Type  
Logout

Welcome **Linda Nianouris**. You are logged in.  
Your Current Group:Hiring Manager/Supervisor. Wednesday, March 18, 2009

### View Active Evaluations

**Active Evaluations**

2 Records

Classification Title	Employee First Name	Employee Last Name	Evaluation Working Title	Last Action Date	Status
Administrative Secretary <a href="#">View</a> <a href="#">Summary</a>	Monica	Duffy	Administrative Secretary & Receptionist	03-16-2009	Sent to Employee for Self Evaluation
Administrative Secretary <a href="#">View</a> <a href="#">Summary</a>	Monica	Duffy	Administrative Secretary & Receptionist	03-18-2009	Sent to Supervisor to Perform Evaluation

Click on "Edit" to open the evaluation. Note that your options have change as to whom you can send the evaluation to when you are finished. Depending on the workflow for your group, you can complete your part of the evaluation, then send back to the employee or send to a second level supervisor for review before you talk to the employee. The navigation for editing as a supervisor follows the same path as it does for an employee, except the boxes change so that you can enter your comments. You cannot change the employee's comments about their self assessment. You will be able to edit goals. This would

also be the time when you should schedule your face-to-face discussion with the employee about the performance review.

**UNIVERSITY of DAYTON**  
Employment and Position Management

• Welcome **Linda Nianouris**. You are logged in.  
Your Current Group:Hiring Manager/Supervisor. Wednesday, March 18, 2009

### View Performance Appraisal Research Personnel Summary - Administrative Secretary & Receptionist

To change the status of this action, choose from the statuses below:

**Edit**  Printer-Friendly Version

**Evaluation Status**

Save  
 Send to 2nd Level Supervisor Prior to Discussion  
 Send to Employee to Review Evaluation

**CANCEL** **CONTINUE**

**Evaluation Details**

Employee First Name:	Monica
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After you have entered your comments, select the radio button next to the option to “Send to Employee to Review Evaluation.” This will create a system generated e-mail telling the employee they can review your comments. The employee will review the comments, then send back to you acknowledging that they have read the review. If they disagree or want to add additional information, they can do so utilizing the tab titled “Attach Documents.” At this point in time, you options will change again under Evaluation Status so that you can send to HR for filing.