



Performance Management
Annual Evaluation for
Exempt Employees

Employee Guide



*Tasks to be Performed
& How to Use the
System*

Tasks

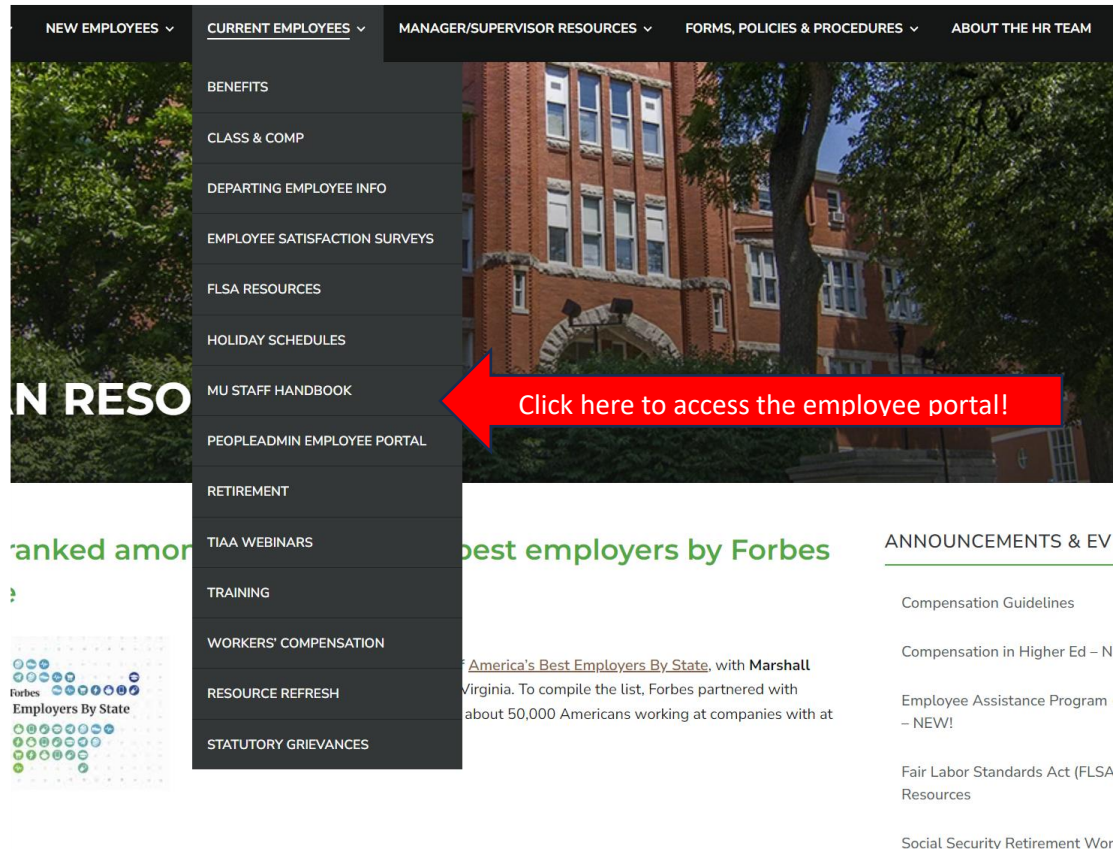
The tasks that will be completed in the Annual Evaluation are listed below. The steps highlighted in red are the steps you as the employee will take.

1. Supervisor Sets Plan
2. Mid-Year Check-In
- 3. Self-Evaluation**
4. Supervisor Evaluation
5. Supervisor Meets with Employee
- 6. Employee Signs Off on Evaluation**
7. Supervisor Signs Off
8. Second Level Supervisor Approves

Accessing the Employee Portal

There are three ways to access the Employee Portal.

1. You will access it from the [HR page](#). You will choose the “Current Employee” tab at the top. When the drop-down menu appears, you will choose the PeopleAdmin Employee Portal.



2. You can access the portal via the email notifications sent to you from PeopleAdmin.

From:
Sent:
To:
Subject: Your Performance Management Action Items -

Hello

There are performance evaluation action items that **need your attention**.

Please see the item(s) listed below:

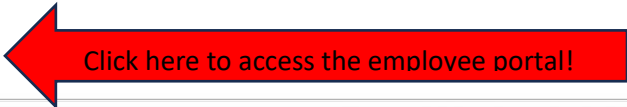
Open Action Item - 3

You have at least one action item open.

Please see the item(s) listed below:

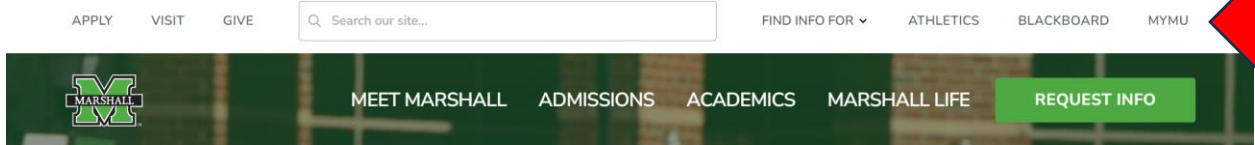
- Supervisor Sets Plan
- Supervisor Sets Plan
- Supervisor Sets Plan

[View your Action item in the Marshall University Employee Portal.](#)

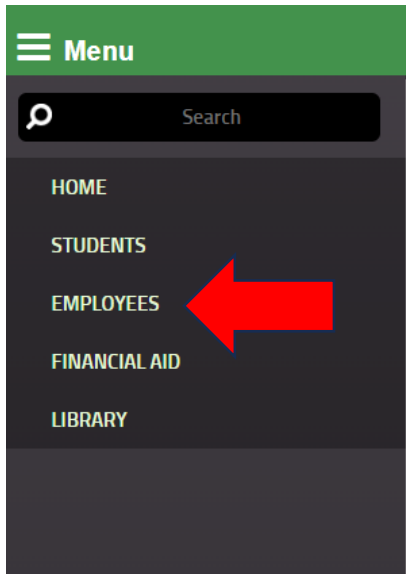


Please log into the Marshall University Employee Portal at the link above and complete your action items. Please email performance-evaluations@marshall.edu if you have any questions.

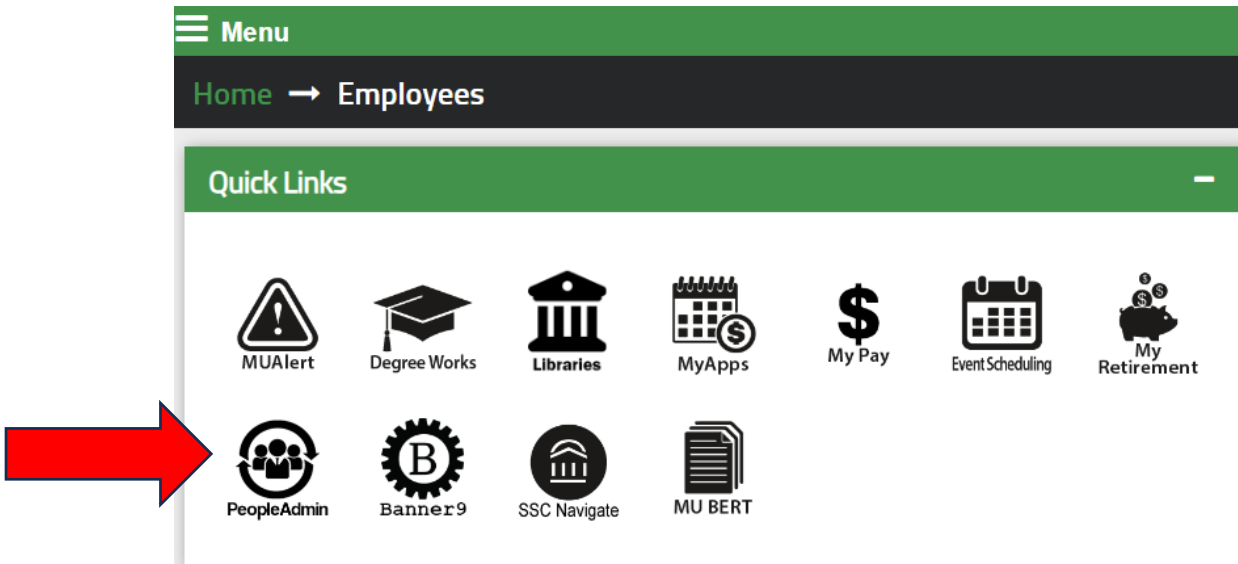
3. You can access the portal through myMU



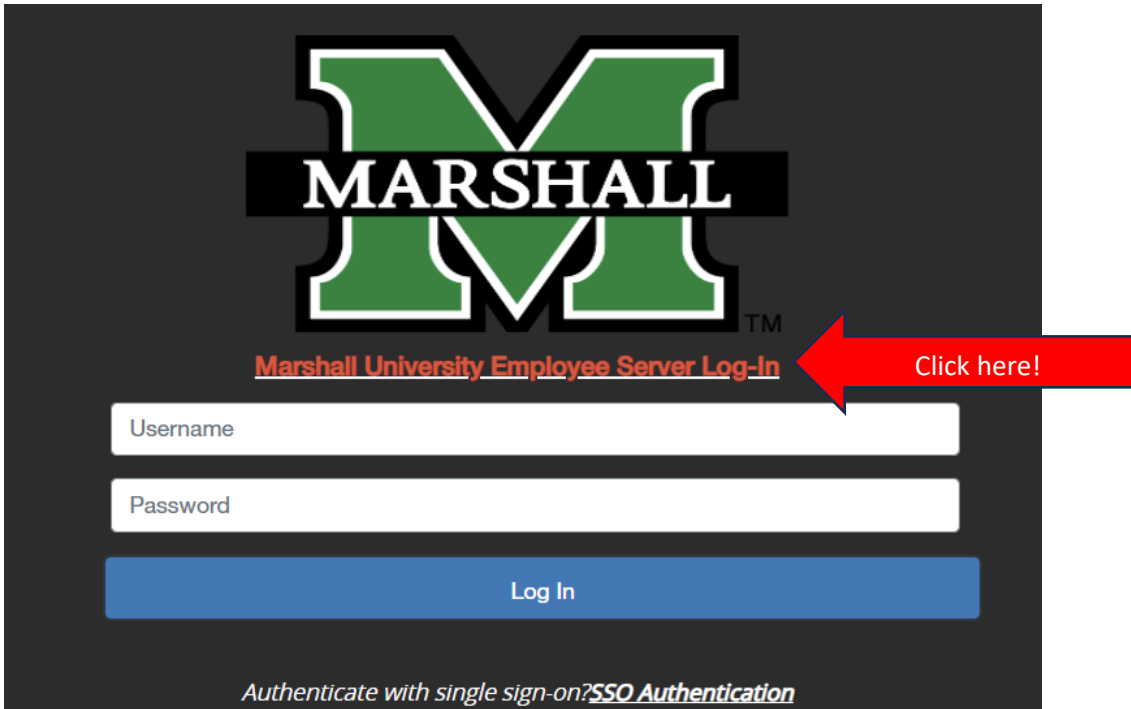
You will click the menu and choose “employee”



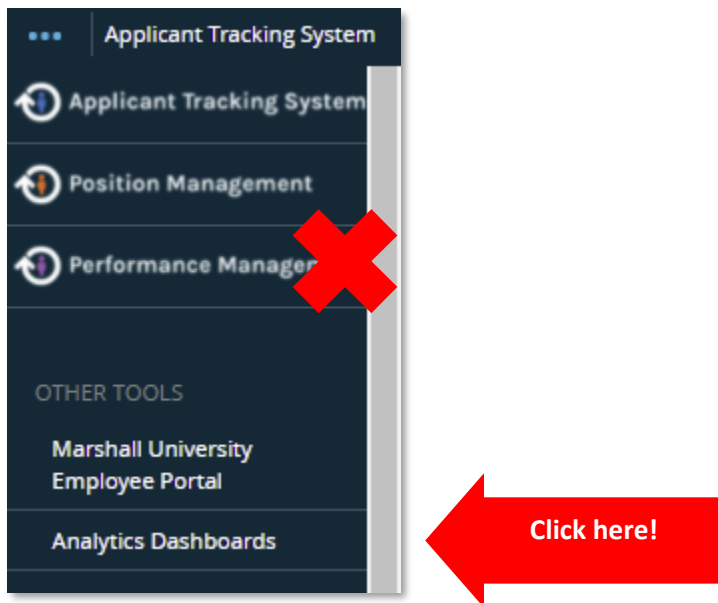
You will click the PeopleAdmin icon



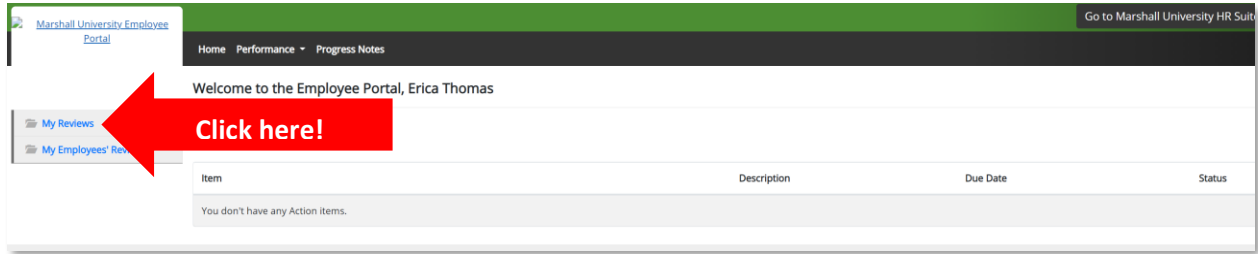
You will then click the red “Marshall University Employee Server Log-In” link.
Do not enter your username and password on this screen!



You will click the three dots in the top left-hand corner. Then select the Marshall University Employee Portal (you will not select the Performance Management on this screen).

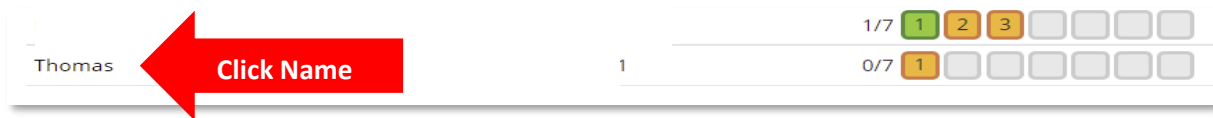


You will be routed to the Employee Portal for Performance Management. This page displays the items that require some action for you to complete.



My Reviews

The “My Reviews” option will display the evaluations you are responsible for completing. You will click on the name of the employee to view the evaluation process.



Continue to next page!

You will see a list of tasks that need to be completed for the performance evaluation. The open tasks will be highlighted in blue text. To open the task, you will click the task name and continue to the next screen.



Task 1:
Employee Self
Evaluation

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Sets Plan			2021-10-18	
2	Mid-Year Check-In			2021-10-18	
3	Employee Self Evaluation				
4	Supervisor Evaluation				
5	Supervisor Meets with Employee				
6	Employee Signs Off on Evaluation				
7	Supervisor Signs Off				
8	Second Level Supervisor Approves				



Self Evaluation

The employee self-evaluation process consists of questions where you are required to rate yourself for **Competencies and Goals**. The rating scale is explained on each tab and is also shown in the table below.

Rating Scale
<p>Value (4) - Exceptional (3.5 - 4.00) Performance far exceeded expectations due to exceptionally high quality of work; producing “game changing” results that completely changed the trajectory of the department, division, or University.</p>
<p>Value (3) - Exceeds Expectations (3.0 - 3.49) Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met.</p>
<p>Value (2) - Meets Expectations (1.76 - 2.99) Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.</p>
<p>Value (1) - Needs Improvement (0.00 - 1.75) Performance did not consistently meet expectations – performance failed to meet expectations in one or more essential areas of responsibility, and/or one or more of the most critical goals were not met.</p>

A. Competencies: You will review the key competencies shared by those in your specific type at the university.

Please elect the rating for each Competency.

Job Accountabilities

Please comment and rate your performance on each competency for this year.

Competency:

Decision Making and Expense Management

- Thoroughly examines problem situations and defer to others as needed.
- Streamlines work processes and increases efficiency by focusing on achieving critical priorities. Suggests effective solutions that focus on decreasing expenses and saving time.
- Uses a strong, rational decision-making process to gather key facts and information to make assessments and solid recommendations.
- Coaches others on being both effective and efficient. Recognizes personal productivity as a key career development goal.

* Rating

Please select

Comments



Competency:

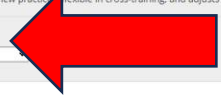
Innovation/ Flexibility and Initiative

- Encourages collaboration and innovation by contributing fresh ideas and alternatives to improve workflow. Does not change established processes without approval.
- Demonstrates an interest in professional development opportunities. Embraces technological changes and keeps up to date on developments within specialty.
- Exhibits an ability to translate organizational goals into personal action and efforts that move the organization forward. Serves as a valuable business partner to coworkers, vendors, and students.
- Quickly adapts to new practices, flexible in cross-training, and adjusts to changes in assignments and working conditions.

* Rating

Please select

Comments



Competency:

Job Knowledge

- Possesses a thorough knowledge and expertise of the position, and the execution of work in all of its dimensions. Serves as a subject matter expert in terms of troubleshooting.
- Demonstrates a natural curiosity about where the university is heading and how to help it get there faster. Takes a "strategic business partner" approach to solving challenges.
- Exhibits a deep level of understanding of the institution and the changing needs of higher education.
- Shares knowledge and expertise by participating on committees and taskforces to broaden exposure to other functions, disciplines, and roles within the institution.

* Rating

Please select


Comments



Competency:

Teamwork

- Practices open and honest communication, supporting a culture of trust and teamwork. Contributes to an environment where people cooperate, resolve conflicts, and set a positive example for others to give their best.
- Demonstrates collaboration by listening to the needs of others and accepting constructive feedback and suggestions. Creates an environment for learning, growing, and acquiring new skills.
- Actively promotes a culture of shared accountability and responsibility. Emphasizes teamwork, modeling the principle that both successes and challenges are shared. Advocates for a "WE ARE... MARSHALL" approach, ensuring team cohesion in daily tasks and overall objectives.

* Rating 

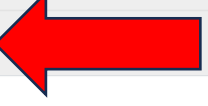
Please select

Comments

Competency:

Productivity, Quality and Reliability

- Effectively utilizes job resources to achieve sets goals, completes assignments on time, and meet work quantity expectations. Uses sound judgment and designs work processes that maximize productivity without compromising quality.
- Operates independently with minimal supervision, contributing to a flexible and diverse work environment that fosters self-regulation and job satisfaction.
- Sets benchmarks for ongoing quality improvements and remains customer-focused, flexible and responsive.
- Exhibits reliability by streamlining workflows, meeting deadlines consistently, taking responsibility for actions, and handles special requests effectively.

* Rating 

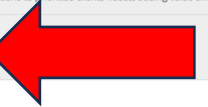
Please select

Comments

Competency:


Customer Focus

- Demonstrates a proactive and dedicated approach to exceeding customer expectations and achieving exceptional outcomes.
- Cultivates lasting relationships with clients by anticipating needs and ensuring timely follow-up.
- Identifies creative ways to set the Marshall apart from competitors, continuously striving to exceed expectations of those whom you serve.
- Adapts strategies and solutions to prioritize clients needs, adding value and managing interactions with tact and diplomacy.

* Rating 

Please select

Comments

 [Draft](#) [Save & Continue](#)

A. Goals: You will rate yourself on the goals you and your supervisor identified in the beginning of the evaluation cycle.

Goal:
Goal 1

* Rating
Please select
Comments

Goal:
Goal 2

* Rating
Please select
Comments

Goal:
Goal 3

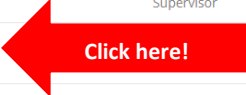
* Rating
Please select
Comments

Click here to complete self- evaluation [raft](#) [Complete](#)



Task 2:
Employee Signs-Off on
Evaluation

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Sets Plan	Erica Thomas Supervisor		2021-10-18	
2	Mid-Year Check-In	Erica Thomas Supervisor		2021-10-18	
3	Employee Self Evaluation	Mary Chapman			
4	Supervisor Evaluation	Bruce Felder Supervisor			
5	Supervisor Meets with Employee	Bruce Felder Supervisor			
6	Employee Signs Off on Evaluation				
7	Supervisor Signs Off	Bruce Felder Supervisor			
8	Second Level Supervisor Approves	F. Layton Cottrill Reviewing Officer			



Employee Signs off on Evaluation

The next step is for the employee to sign off on the evaluation. This is a simple click of the “Complete” blue button in the system.

Comment [Check spelling](#)

[Acknowledge](#)

Congratulations, you have completed the

Annual Performance Process!