



Performance Management Annual Evaluation for *Exempt Employees*

Supervisor Guide



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

Tasks

The tasks that will be completed in the Annual Evaluation by supervisors coded in red below:

- 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.

NEW EMPLOYEES ▾ CURRENT EMPLOYEES ▾ MANAGER/SUPERVISOR RESOURCES ▾ FORMS, POLICIES & PROCEDURES ▾ ABOUT THE HR TEAM

BENEFITS
CLASS & COMP
DEPARTING EMPLOYEE INFO
EMPLOYEE SATISFACTION SURVEYS
FLSA RESOURCES
HOLIDAY SCHEDULES
MU STAFF HANDBOOK
PEOPLEDADMIN EMPLOYEE PORTAL
RETIREMENT
TIAA WEBINARS
TRAINING
WORKERS' COMPENSATION
RESOURCE REFRESH
STATUTORY GRIEVANCES

anked among... best employers by Forbes
ANNOUNCEMENTS & EV
Compensation Guidelines
Compensation in Higher Ed – N
Employee Assistance Program – NEW!
Fair Labor Standards Act (FLSA) Resources
Social Security Retirement Wor

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:

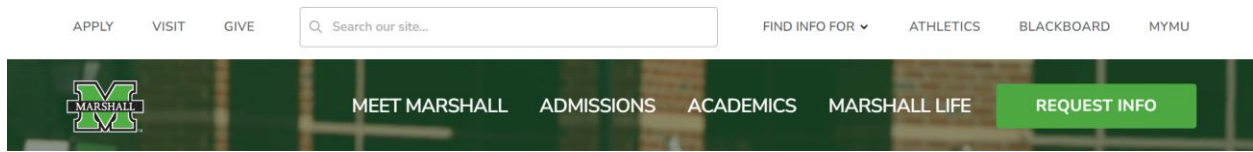
- Supervisor Sets Plan
- Supervisor Sets Plan
- Supervisor Sets Plan

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

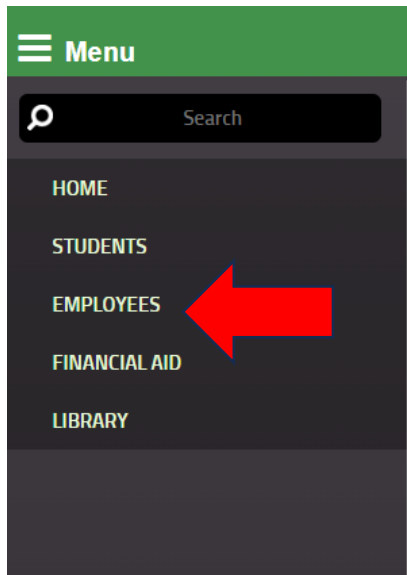
Click here to access the employee portal!

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.

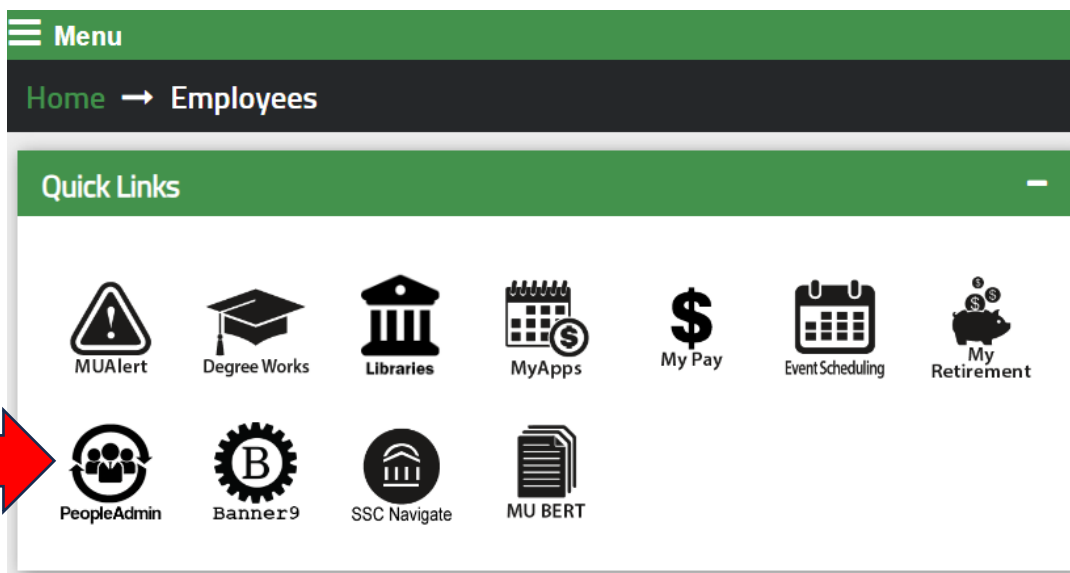
3. You can access the portal through myMU



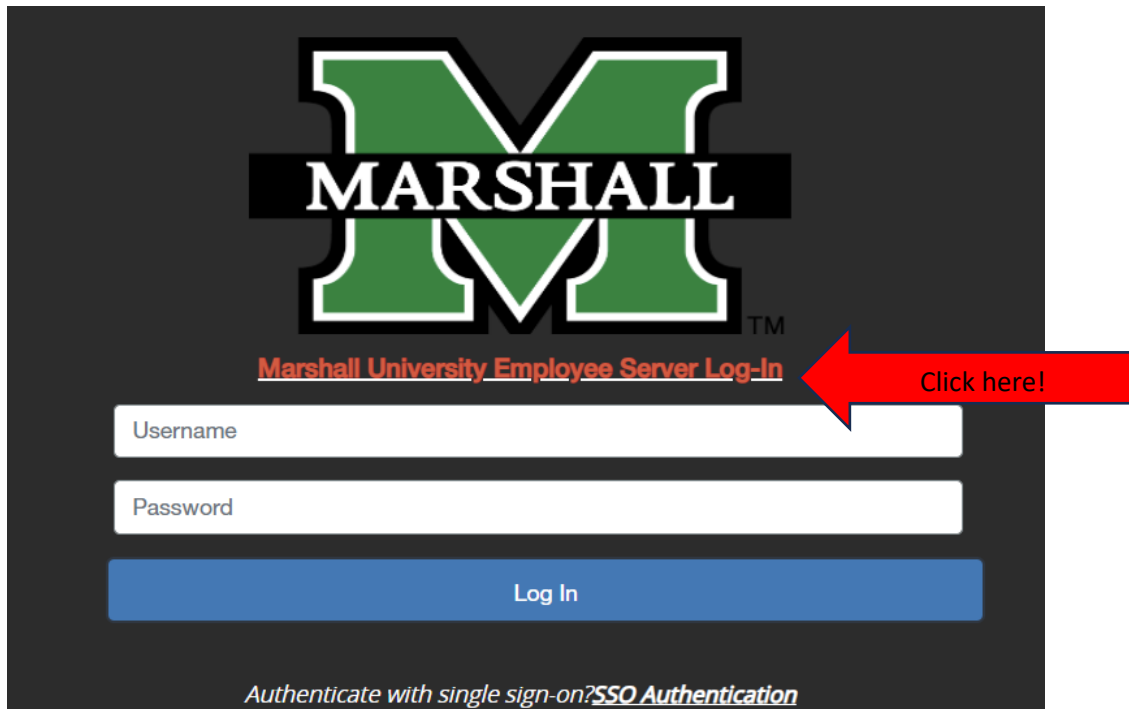
You will click the menu and choose “employee”



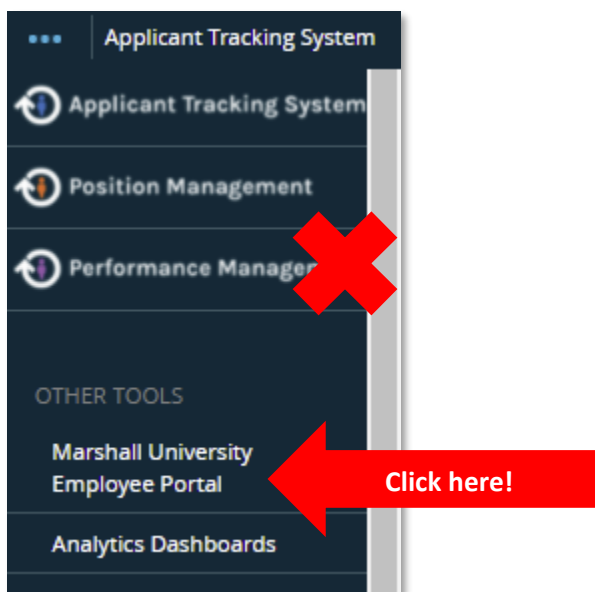
You will click the PeopleAdmin icon



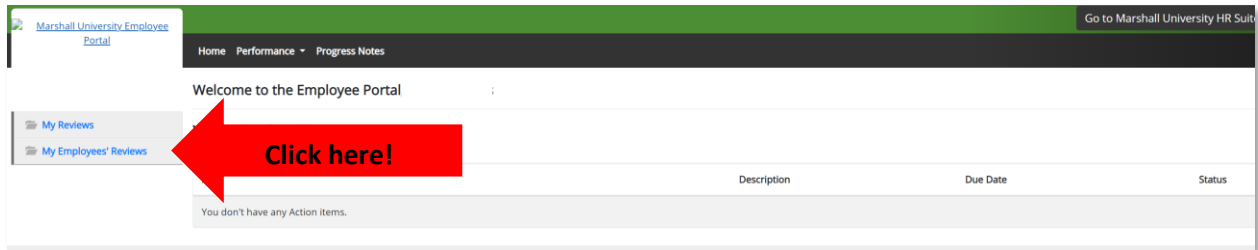
You will then click the red “Marshall University Employee Server Log-In” link.
Do not enter your username and password on this screen!



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).

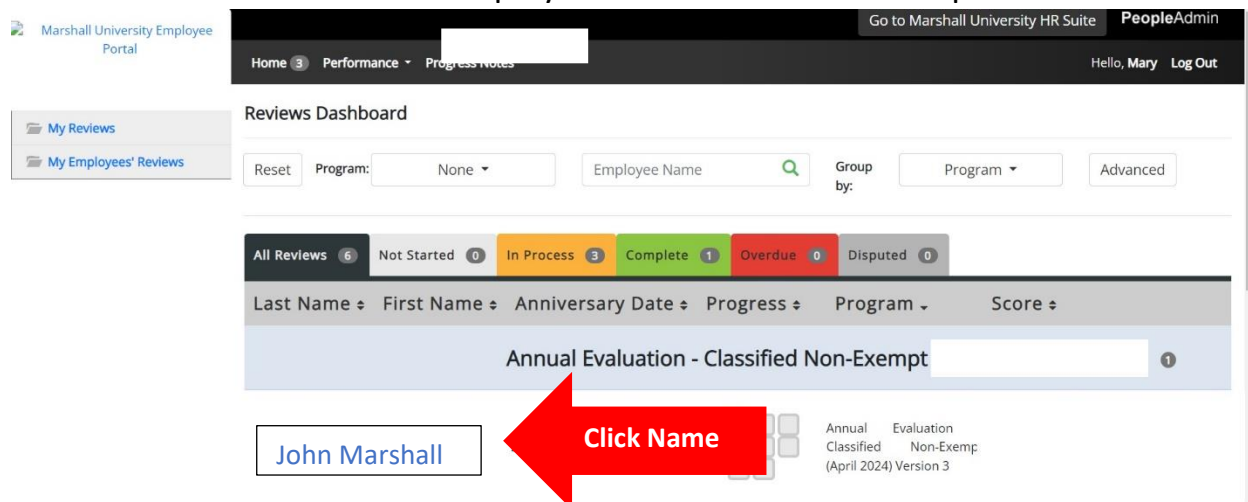


You will be routed to the Employee Portal for Performance Management. This page displays the items that require some action for you to complete.



My Employee Reviews

The “My Employee Reviews” option will display the listing of the employees you supervise and are responsible for completing the performance evaluation. 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:

Supervisor Sets Plan

Go to Marshall University HR Suite PeopleAdmin

Home 3 Performance ▾ Progress Notes Log Out

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Sets Plan		24-04-03		2024-07-31
2 Mid-Year Check-In	Supervisor	2024-04-03		2025-01-15
3 Employee Self Evaluation		2024-04-03		2025-06-01
4 Supervisor Evaluation	Supervisor	2024-04-03		2025-06-05
5 Supervisor Meets with Employee	Supervisor	2024-04-03		2025-06-05
6 Employee Signs Off on Evaluation		2024-04-03		2025-06-15
7 Supervisor Signs Off	Supervisor	2024-04-03		2025-06-16
8 Second Level Supervisor Approves	Reviewing Officer	2024-04-03		2025-06-20

Annual Evaluation Non-Classified and Classified Exempt (April 2024) Version 1

Review Status: Open

Evaluation Type: Focal

Program Timeframe: 07/01/24 to 06/30/25

Last Updated: April 15, 2024 16:28

Co-reviewer: [Add Co-reviewer](#)

Supervisor Sets Plan

In the Supervisor Sets the Plan Step, the supervisor must review the Goals and Competencies with the employee. When you have reviewed both tabs, you will click the “Complete” blue button at the bottom of the page.

- A. Competencies:** You will review the key competencies shared by those in your specific type at the university
- B. Goals:** The goals that you list here will be the goals you want your employee to achieve in the upcoming year.

Job Accountabilities

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.

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.

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.

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.

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.

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.

Save and contunue to enter goals

Draft

Save & Continue

Each employee must have at least 3-5 goals they will be working on in the upcoming year. **Please remember that the supervisor must meet with the employee to complete the plan.**

Goals

* Goal
Goal 1
 Remove Entry?

* Goal
Goal 2
 Remove Entry?

* Goal
Goal 3
 Remove Entry?

← Add Additional Goals Here! **Click to Complete!**



Task 2:

Mid-Year Check-In

Mid-Year Check In

The mid-year-check-in is where you should meet with your employee to see how things are going. You can also discuss progress or things that need to be addressed. The only action that needs to take place here is to click the Complete button. This acknowledges that you had a meeting and completed the task.

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

Supervisor:
Position Description: [HR Rep](#)
Department: Human Resources - MU1065

Overview

Plan

Supervisor Evaluation

Self Evaluation

History

 My Reviews

 My Employees' Reviews

Mid-Year Check-In

The mid-year-check-in is where you should meet with your employee to see how things are going. You can also discuss progress or things that need to be addressed. The only action that needs to take place here is to click the Complete button. This acknowledges that you had a meeting and completed the task.

Click here to complete!

 Complete



Task 3:

Supervisor Evaluation

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

Click here to complete the supervisor evaluation!

Supervisor Evaluation

The supervisor evaluation will open within a certain time frame once the evaluation period begins. You will click on the blue text to begin the evaluation. The Supervisor evaluation consists of questions where you are required to rate the employee for Goals and Competencies. The rating scale is explained on each tab and is also shown in your instructions.

Rating Scale

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.

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.

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.

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.

A. Job Accountabilities

Job Accountabilities

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

<p>Competency:</p> <p>Decision Making and Expense Management</p> <ul style="list-style-type: none">• 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. <p>* Rating Please select</p> <p>Comments</p> <p>Add your rating here!</p>
<p>Competency:</p> <p>Innovation/ Flexibility and Initiative</p> <ul style="list-style-type: none">• 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. <p>* Rating Please select</p> <p>Comments</p> <p>Add your rating here!</p>

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.

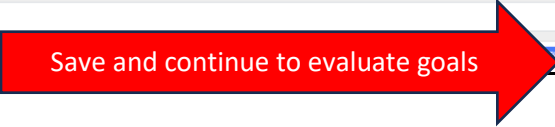
* Rating
Please select
Comments

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.
- Adopts strategies and solutions to prioritize clients needs, adding value and managing interactions with tact and diplomacy.

* Rating
Please select
Comments

Save Draft Save & Continue



B. Goals

You will evaluate the employee on their goals.

Goal:
Goal 1

* Rating **← Add your rating here!**

Please select
Comments

Goal:
Goal 2

* Rating **← Add your rating here!**

Please select
Comments

Goal:
Goal 3

* Rating **← Add your rating here!**

Please select
Comments

→ Click here to complete the evaluation!



Task 4:
Supervisor Meets with
Employee

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



Supervisor Meets with Employee

The next step is for the Supervisor to meet with the Employee to discuss the evaluation. This is a simple click of the “Complete” blue button in the system.

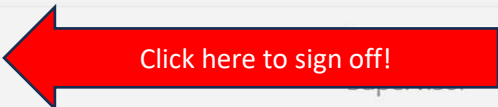
Supervisor Meets with Employee

Click to Complete!

Complete



Task 5:
Supervisor Signs-Off on
Evaluation

Overview			Steps	Plan	Evaluations	Acknowledgements	HR No
Task		Task Owner					
1	Supervisor Sets Plan	Supervisor					
2	Mid-Year Check-In	Supervisor					
3	Employee Self Evaluation						
4	Supervisor Evaluation	Supervisor					
5	Supervisor Meets with Employee	Supervisor					
6	Employee Signs Off on Evaluation						
7	Supervisor Signs Off						
8	Second Level Supervisor Approves	Reviewing Officer					

Supervisor Signs Off on Evaluation

The employee will acknowledge/sign off on the evaluation and then the next step for the supervisor is acknowledging/signing off on the evaluation. The supervisor can make comments in the Comment box and then complete this step by clicking the “Acknowledge” blue button.

Goal:
Goal 1

Rating
Meets Expectations - 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.

Comments

Goal:
Goal 2

Rating
Meets Expectations - 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.

Comments

Goal:
Goal 3

Rating
Meets Expectations - 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.

Comments

Comment

[Check spelling](#)



You have now completed the evaluation process as the supervisor. The evaluation has now been submitted to the 2nd Level Supervisor for approval.