



Performance Management
Annual Evaluation for
Non-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
PEOPLEADMIN EMPLOYEE PORTAL
RETIREMENT
TIAA WEBINARS
TRAINING
WORKERS' COMPENSATION
RESOURCE REFRESH
STATUTORY GRIEVANCES

Click here to access the employee portal!

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:

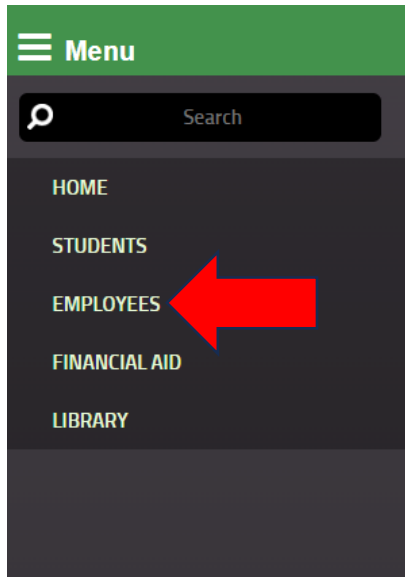
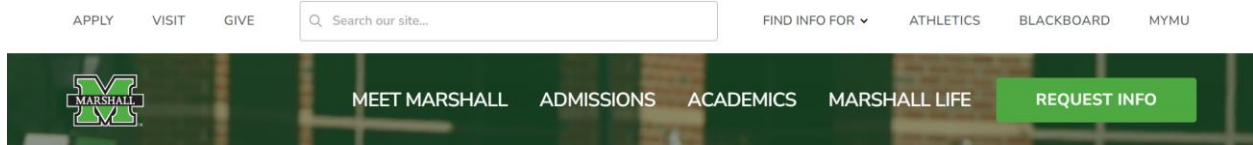
- Supervisor Sets Plan
- Supervisor Sets Plan
- Supervisor Sets Plan

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

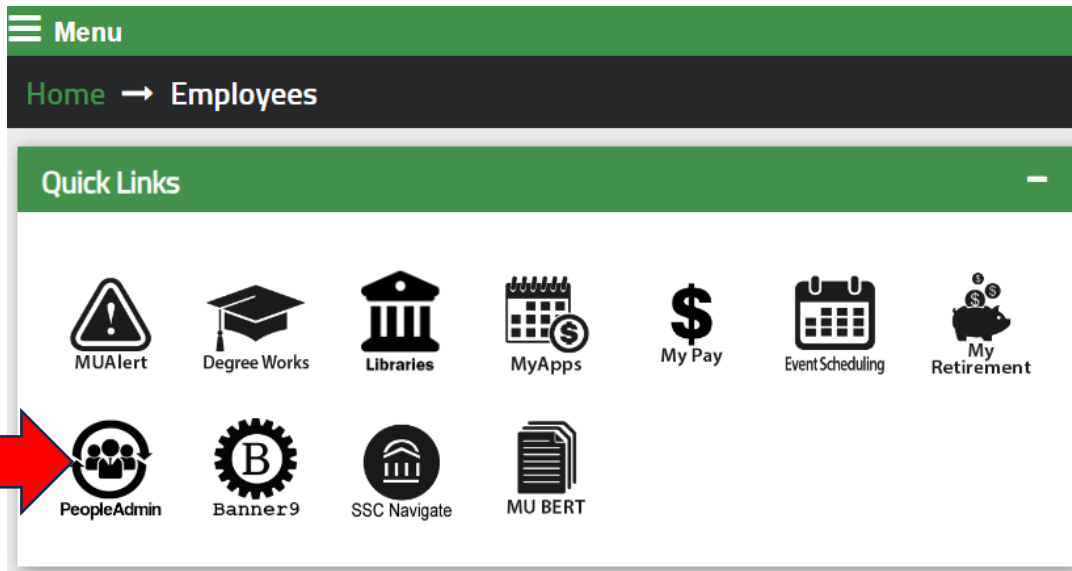
Click here to access the employee portal!

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.

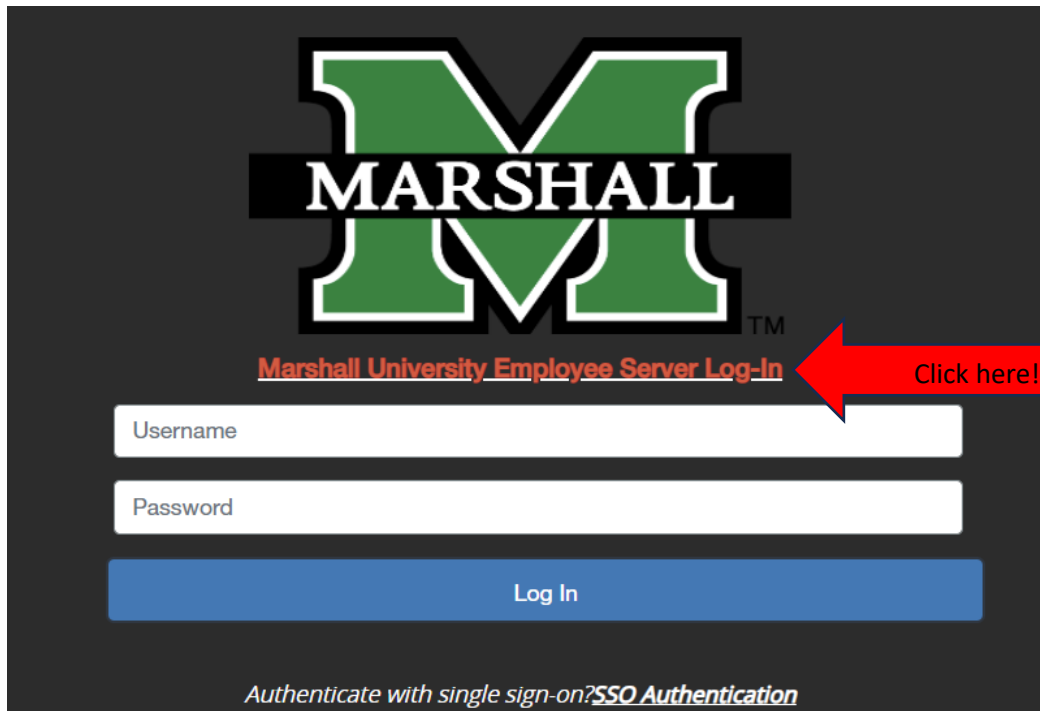
3. You can access the portal through myMU



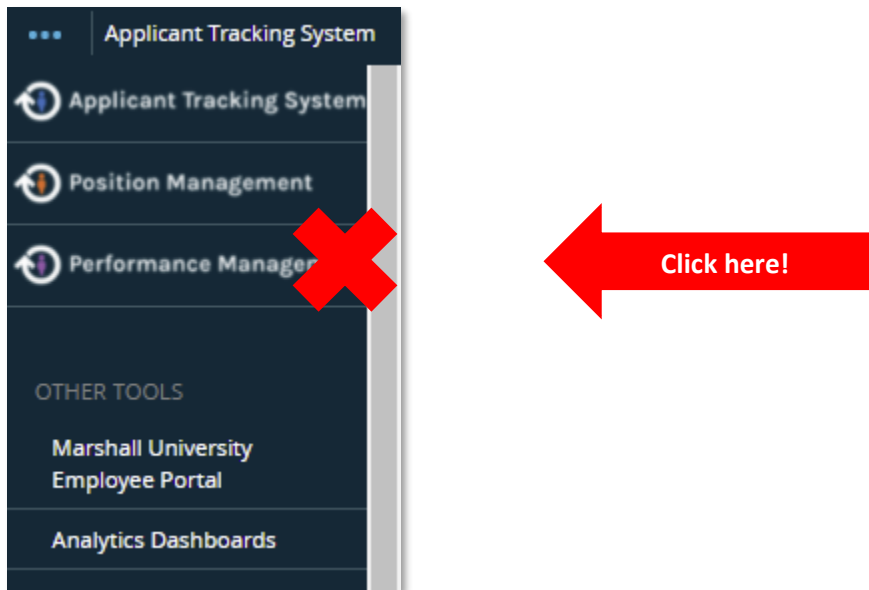
You will click the PeopleAdmin icon



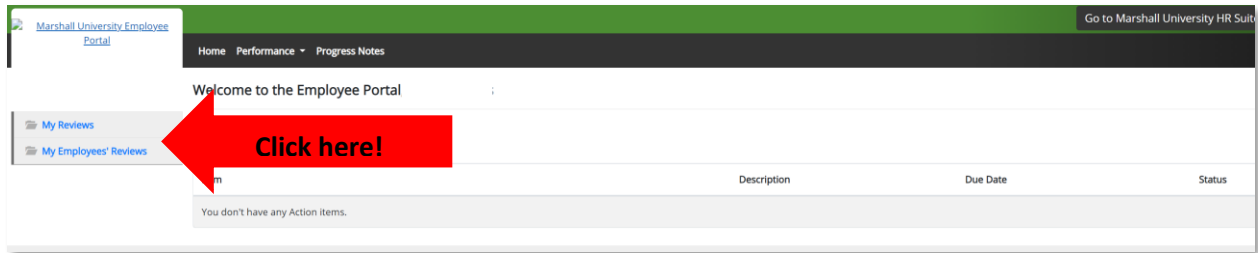
You will then click the red “Marshall University Employee Server Log-In” link.
Do not enter your username and password on this screen!



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).

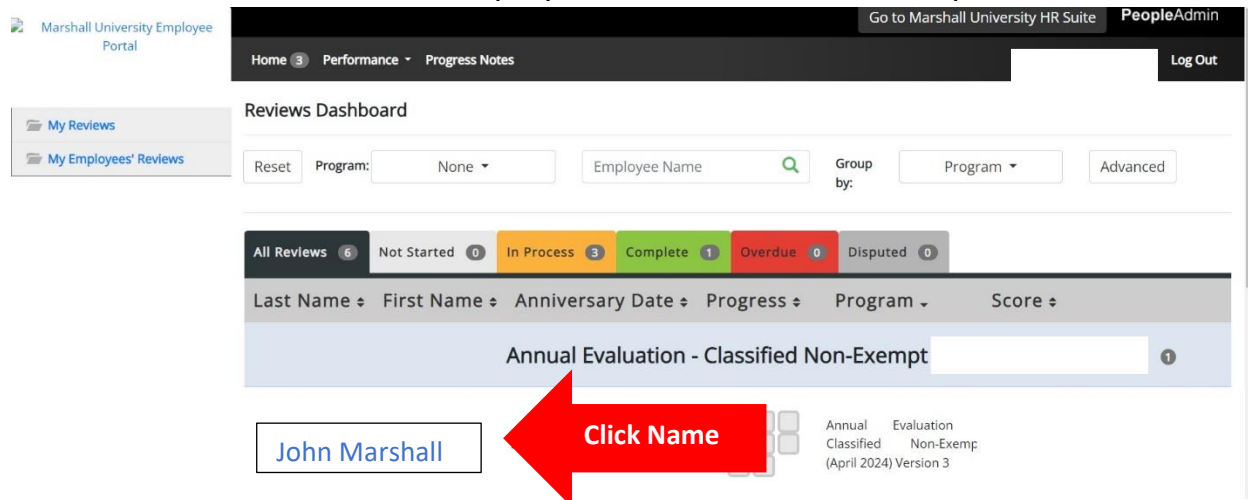


You will be routed to the Employee Portal for Performance Management. This page displays the items that require some action for you to complete.



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

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Sets Plan		2024-04-03		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

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. Job Accountabilities:** You will review the key competencies shared by those in your specific type at the university.

Accountabilities

Competency

Teamwork

- Regularly builds strong, supportive, and constructive relationships with colleagues throughout the University.
- Goes the “extra mile” to achieve extraordinary outcomes by putting the needs of the team above their own
- Brings out the best in people by promoting an environment where everyone is encouraged to excel, and by demonstrating care and concern for their well-being.

Competency

Quality, Health and Safety

- Maintains standards of conduct in attendance and punctuality.
- Demonstrates best practices and maintains high standards of quality without compromising efficiency, satisfying all deadlines, goals, and objectives.
- Maintains performance standards through interruptions and challenges, while proactively addressing potential obstacles.
- Demonstrates a commitment to fostering a culture of safety, actively contributing ideas for safety improvements, participating in safety training, and ensuring prompt reporting of any accidents or safety violations.

Competency

Customer Focus

- Exhibits problem-solving abilities and flexibility in handling client’s needs, ensuring timely and empathetic feedback, follow-through, and responsiveness to last-minute changes.
- Builds strong relationships, even with challenging clients, and is often seen as the “go to” person.
- Tactfully informs customers when their requests cannot be met and escalates matters for further review and approval as appropriate.
- Demonstrates exceptional commitment by consistently going above and beyond to achieve remarkable outcomes with total dedication to exceptional customer service that consistently exceeds students and clients’ expectations.

Competency

Efficiency and Flexibility

- Continuously seeks to enhance effectiveness and efficiency by taking on new tasks, processes, and technologies proactively.
- Seamlessly manages multiple projects and views delays as opportunities to showcase preparedness and adaptability.
- Excels in anticipating and communicating potential issues before they arise.
- Demonstrates patience and flexibility in adjusting priorities to accommodate changing business needs or during crisis situations, thus ensuring the smooth progression of work and the attainment of organizational goals.

Competency

Professional Development and Technical Knowledge

- Possesses professional expertise and a comprehensive understanding of their role, consistently applying their knowledge and skills to excel in their responsibilities.
- Committed to maintaining and expanding their expertise, staying abreast of industry standards and technological advancements.
- Consistently models our University Creed and maintains professionalism and composure when faced with crises, and other difficult matters in the work environment.
- Attends all training programs and maintains certifications as required.

Click save and continue to enter goals

Save & Continue

B. Goals: The goals that you list here will be the goals you want your employee to achieve in the upcoming year.

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.**

The Plan has been saved. ✕

Plan for Actions ▾ Annual Evaluation Non-Classified and Classified Exempt

In the Supervisor Sets 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 position type at the organization.

b. **Goals** - The goals that you list here will be the goals you want the employee to achieve in the upcoming year.

Competencies Goals

Required fields are indicated with an asterisk (*). Check spelling

Goals

* Goal

Remove Entry?

Add Entry Save Draft Complete

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.

The screenshot shows the Marshall University Employee Portal interface. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes'. The main content area is titled 'Mid-Year Check-In' and contains the following text: '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.' A red arrow points from this text to a blue 'Complete' button. The left sidebar contains a navigation menu with the following items: 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'History', 'My Reviews', and 'My Employees' Reviews'. The top right corner of the page has a link that says 'Go to Marshall University HR Su'.



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



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 Job Accountabilities. 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 competency for this year.

Competency:

Teamwork

- Regularly builds strong, supportive, and constructive relationships with colleagues throughout the University.
- Goes the “extra mile” to achieve extraordinary outcomes by putting the needs of the team above their own.
- Brings out the best in people by promoting an environment where everyone is encouraged to excel, and by demonstrating care and concern for their well-being.

* Rating

Meets Expectations

Comments

Enter your rating here

Competency:

Quality, Health and Safety

- Maintains standards of conduct in attendance and punctuality.
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* Rating

Meets Expectations

Comments

Enter your rating here

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Meets Expectations
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- Attends all training programs and maintains all certifications as required.

* Rating
Meets Expectations
Comments

Click here to evaluate on goals!

B. Goals

You will evaluate the employee on their current year goals.

Goals

Please rate and comment on the employees goals from this year.

Goal:
test

* Rating
Meets Expectations
Comments

Goal:
test

* Rating
Meets Expectations
Comments

Goal:
test

* Rating
Meets Expectations
Comments

Click here to complete the evaluation!



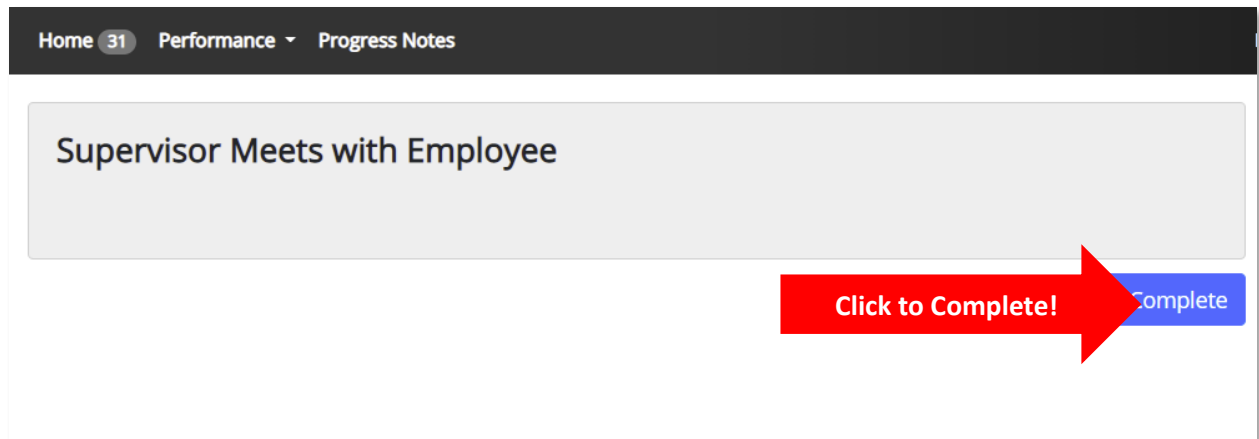
Task 4:
Supervisor Meets with
Employee

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
7	Supervisor Signs Off
8	Second Level Supervisor Approves




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.





Task 5:
Supervisor Signs-Off on
Evaluation

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
7	Supervisor Signs Off 
8	Second Level Supervisor Approves

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.

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