



Performance Management
Annual Evaluation for
Marshall University
Exempt Employees

Supervisor Guide



Tasks to be Performed & How to Use the System

Tasks

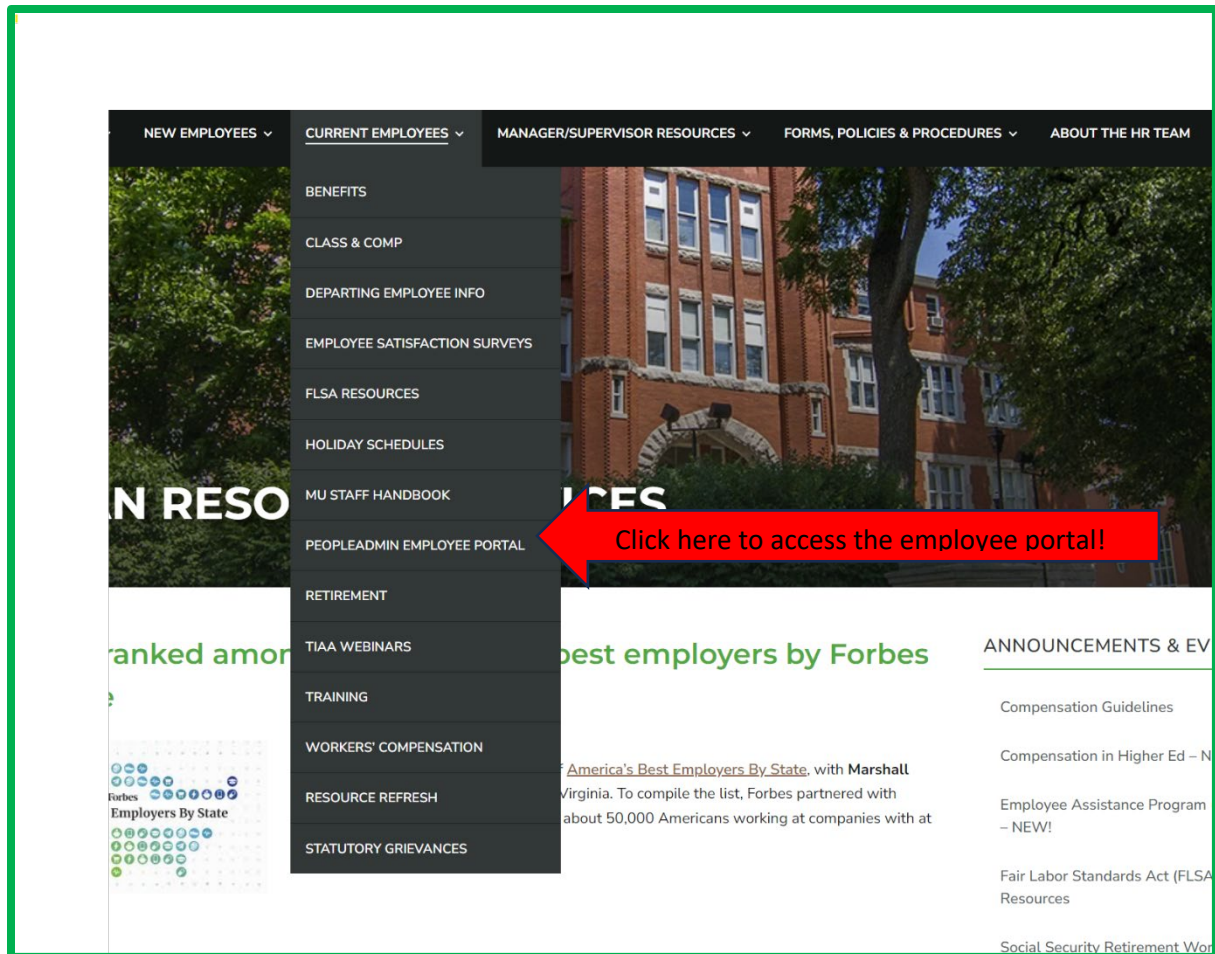
The tasks that will be completed in the Annual Evaluation by supervisors coded in red below:

- 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.



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

APPLY VISIT **GIVE**

Q Search our site...

FIND INFO FOR ▼

ATHLETICS

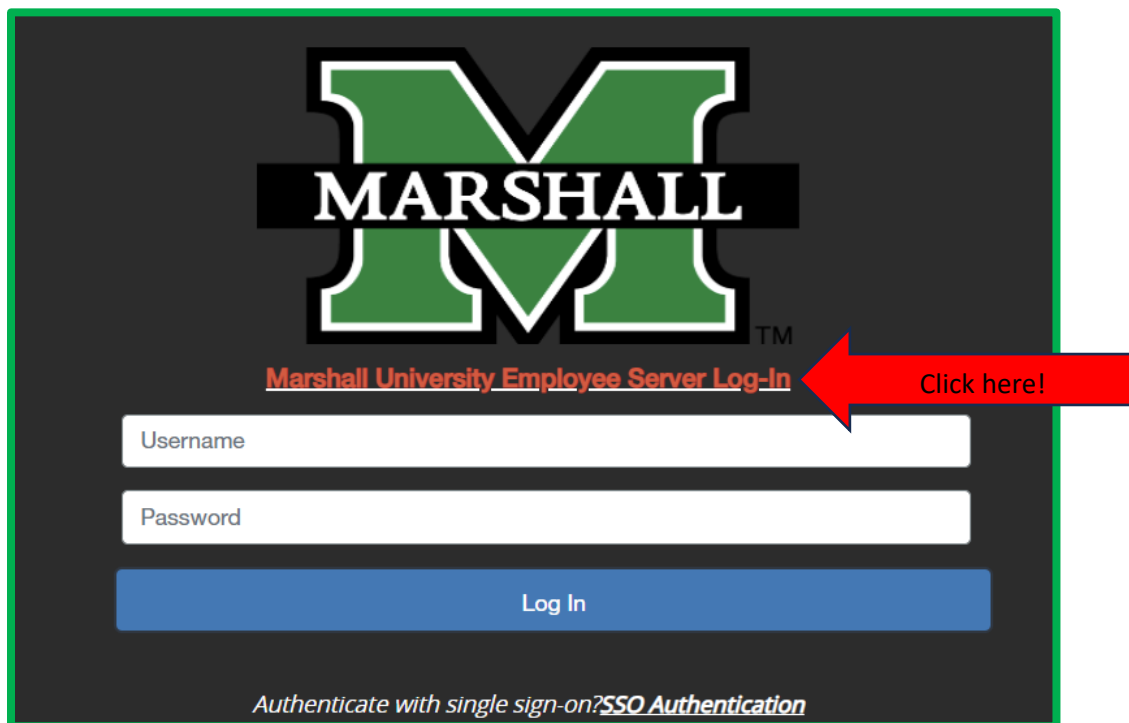
BLACKBOARD

MYMU

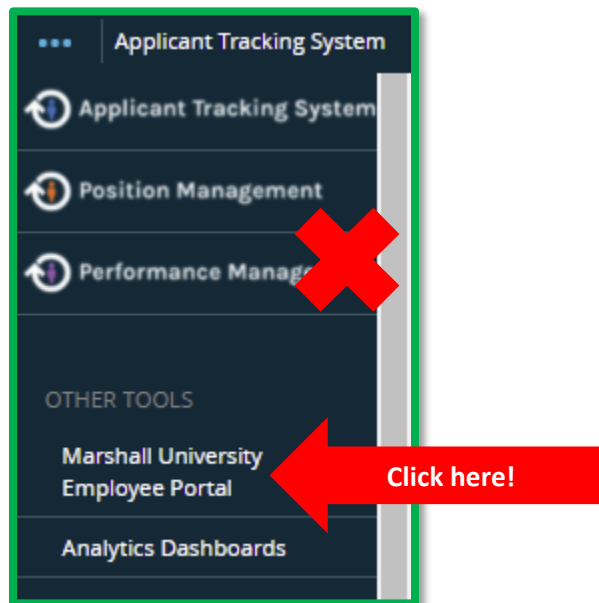
You will look for Quick Links and choose the PeopleAdmin icon.



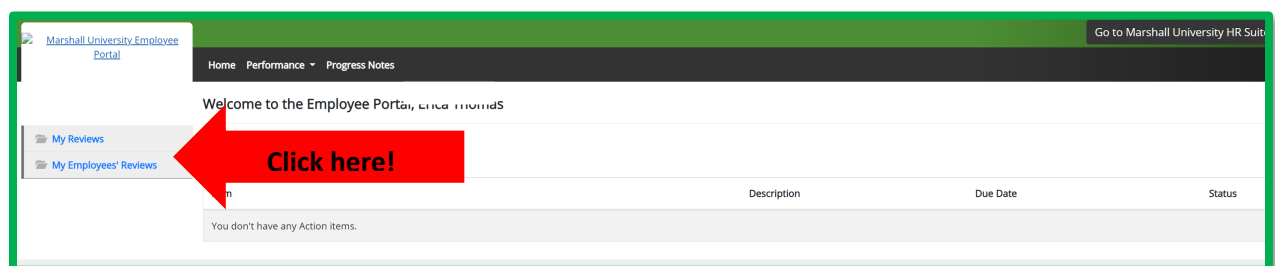
You will then click the red “Marshall University Employee Server Log-In” link.
Do not enter your username and password on this screen!



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.

The screenshot shows the Marshall University Employee Portal. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes'. The user is logged in as 'Mary' and can 'Log Out'. The 'Reviews Dashboard' features a filter section with 'Reset', 'Program' (set to 'None'), 'Employee Name' search, 'Group by' (set to 'Program'), and an 'Advanced' button. Below this is a status bar with tabs: 'All Reviews' (6), 'Not Started' (0), 'In Process' (3), 'Complete' (1), 'Overdue' (0), and 'Disputed' (0). The table headers are 'Last Name', 'First Name', 'Anniversary Date', 'Progress', 'Program', and 'Score'. A table row is highlighted with the name 'John Marshall' and the title 'Annual Evaluation - Classified Non-Exempt'. A red arrow points to the name 'John Marshall' with the text 'Click Name' next to it. The bottom right corner shows 'Annual Evaluation Classified Non-Exempt (April 2024) Version 3'.

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	Supervisor	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

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.

Competencies
Goals

Job Accountabilities

Competency
Decision Making and Expense Management

- Carefully analyzes problems and seeks input from others when necessary.
- Identifies more efficient, effective, and cost-conscious ways to complete tasks.
- Gathers accurate information before making decisions and provides advice based on the facts.
- Helps colleagues work smarter and aims for productive, results-driven outcomes that benefit the department and the university.

Competency
Innovation, Flexibility, and Initiative

- Shares creative ideas to improve processes and collaborates with well others.
- Shows a strong desire to learn and grow, staying current with new technologies and industry trends.
- Connects personal efforts to the university's broader goals and maintains positive relationships with coworkers, students, and external partners.
- Adapts quickly to changes, embraces new tasks, and remains positive in different situations.

Competency
Job Knowledge

- Demonstrates deep knowledge of their role and efficiently solves problems.
- Looks for ways to contribute to its success of the University's future.
- Understands the college system and recognizes how it evolves over time.
- Shares expertise by participating in committees and learning about various aspects of the organization.

Competency
Teamwork

- Builds strong, friendly, and supportive relationships with coworkers across the university, putting the team first and working hard to help everyone succeed.
- Encourages others to do their best by showing kindness, care, and respect, while promoting a "We Are Marshall" spirit through shared wins and losses.
- Communicates honestly and fosters a team environment where people help each other, work well together, and create a space where everyone can learn and grow.
- Listens actively, accepts feedback, and supports a culture of continuous improvement, ensuring everyone feels included and motivated to contribute.

Competency
Productivity, Quality, and Reliability

- Plans work carefully, uses time and resources effectively, and ensures tasks are completed with high quality and on schedule.
- Works independently with minimal supervision and fosters a respectful, flexible work environment.
- Continuously looks for ways to improve performance, prioritizes needs, and adjusts quickly when requirements shift.
- Is dependable, meets commitments, takes ownership of results, and willingly handles additional responsibilities when needed.

Competency
Customer Focus

- Strives to exceed expectations by providing excellent service and anticipating customer needs.
- Builds strong, professional relationships by understanding what customers need and following up promptly.
- Develops creative solutions that enhance the university's reputation and leave a positive impression on students, staff, or external partners.
- Adjusts plans or strategies to meet changing customer demands, always communicating clearly and respectfully.

Save and continue to enter goals
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.**

The screenshot shows a web form titled "Goals" with a light gray background. It contains three identical goal entry sections. Each section has a label "* Goal" in red, a text input field with placeholder text "Goal 1", "Goal 2", and "Goal 3" respectively, and a checkbox labeled "Remove Entry?". At the bottom left is a blue button labeled "Add Entry". At the bottom right are two blue buttons: "Save" and "Complete". A large red arrow points from the text "Add Additional Goals Here!" to the "Add Entry" button. Another large red arrow points from the text "Click to Complete!" to the "Complete" button.

Goals

* Goal

Goal 1

☐ Remove Entry?

* Goal

Goal 2

☐ Remove Entry?

* Goal

Goal 3

☐ Remove Entry?

Add Entry

Add Additional Goals Here!

Click to Complete!

Save 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
7	Supervisor Signs Off
8	Second Level Supervisor Approves

Click here for the Mid-Year Check In!

Marshall University Employee Portal

Supervisor:

Position Description: [HR Rep](#)

Department: Human Resources - MU1065

Overview

Plan

Supervisor Evaluation

Self Evaluation

History

My Reviews

My Employees' Reviews

Home 3 Performance Progress Notes

Go to Marshall University HR Sui

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.

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

Add your rating here!

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

Add your rating here!

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 collaborate, 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

Save and continue to evaluate goals
Save Draft
Save & Continue

B. Goals

You will evaluate the employee on their goals.

The screenshot shows a web-based evaluation form with a green border. It contains three identical sections for goals, each with a 'Goal:' label, a 'Goal' number (Goal 1, Goal 2, Goal 3), a 'Rating' dropdown menu (with 'Please select' as the current selection), and a 'Comments' text area. Red arrows point to the 'Rating' dropdowns with the text 'Add your rating here!'. A large red arrow at the bottom right points to a 'Click here to complete the evaluation!' button, which is a blue button with a right-pointing arrow. Below this button are two smaller blue buttons labeled 'Draft' and 'Complete'.

C. Potential Rating

This is a new section in the evaluation process where you will select the potential rating for your employee. This is a review of the employees ability to grow, develop new skills, and take on future opportunities within the organization.

Potential looks at things like:

- How your employee approaches new challenges
- Their interest in growth and development
- Their ability to lead, collaborate, and influence others
- Their readiness for increased responsibility

Potential Rating Levels

- **High Potential** – Consistently demonstrates strong capability and readiness for increased responsibility. Employees in this category show initiative, leadership qualities, and the ability to adapt quickly. They are well-positioned for advancement or expanded roles in the near future.

- **Medium Potential** – Demonstrates the ability to grow and take on additional responsibilities with continued development. Employees in this category show promise and may be ready for advancement over time with targeted experience, training, or support.
- **Low Potential** – Currently focused on developing skills within their existing role. Employees in this category may require additional time, guidance, or development to prepare for expanded responsibilities. This rating does not reflect performance, but rather current readiness for growth.

You will rate them as “High”, “Medium”, or “Low”. And hit the save button

The screenshot shows a web-based form titled "Supervisor Evaluation for Margaret Cyrus". At the top, there are three tabs: "Competencies", "Goals", and "Potential Rating", with "Potential Rating" being the active tab. To the right of these tabs is an "Attachments" icon. The main content area of the "Potential Rating" tab contains three radio button options: "High Potential", "Medium Potential", and "Low Potential". A blue "Save" button is located at the bottom right of the form.



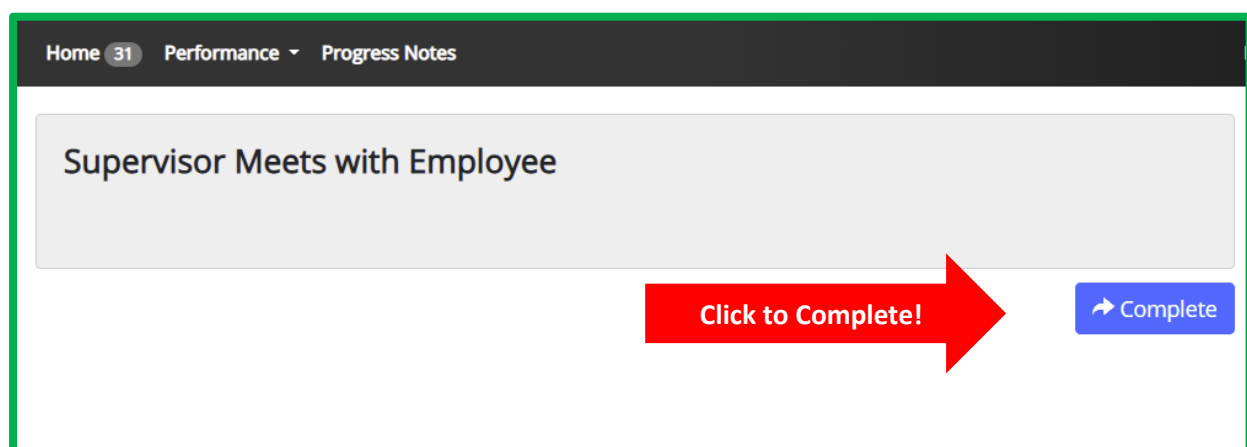
Task 4:

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	Supervisor
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.

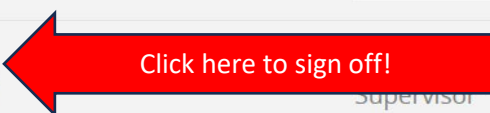




Task 5:

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	Supervisor					
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

Click here to complete!

Acknowledge

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