



# **Performance Management**

## **Annual Evaluation for**

### ***Non-Exempt Employees***

## **Supervisor Guide**



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

## Tasks

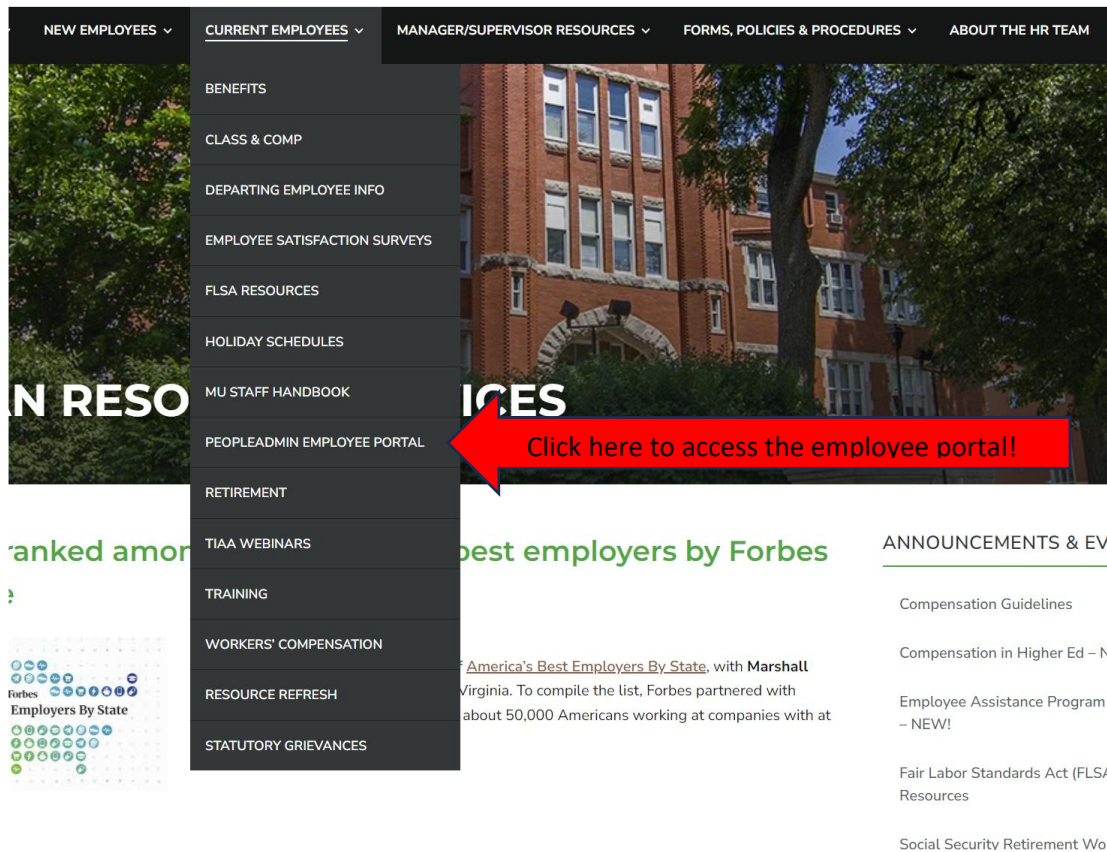
The tasks that will be completed in the Annual Evaluation by supervisors coded in red below:

- 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.



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](mailto:performance-evaluations@marshall.edu) if you have any questions.

### 3.You can access the portal through myMU

APPLY VISIT **GIVE**

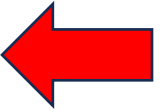
Q Search our site...

FIND INFO FOR ▼


ATHLETICS



















BLACKBOARD

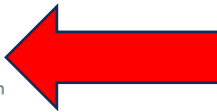
MYMU



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

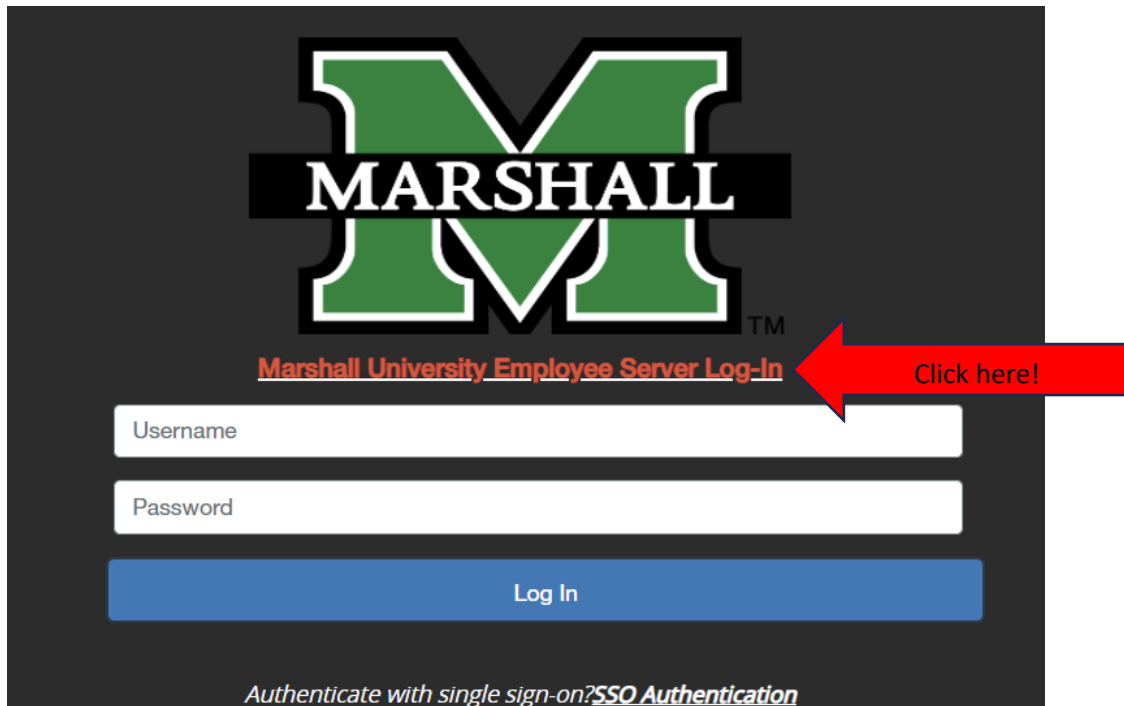
 **Quick Links**

 Advocate - Submit a Report	 Banner9	 Blackboard
 DegreeWorks	 Event Scheduling	 Libraries
 MILO	 MU Alert	 MU BERT
 My Pay	 My Retirement	 MyApps
 New myMU Feedback	 Outlook	 PeopleAdmin
 SSC Navigate	 TCP Time Report (Employee)	 TCP Time Report (Manager)



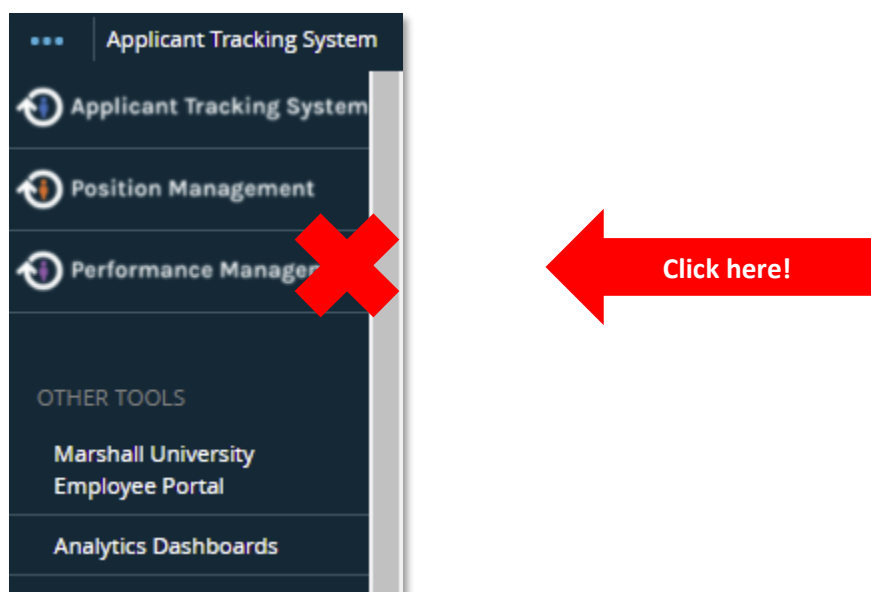
You will then click the red “Marshall University Employee Server Log-In” link.

**Do not enter your username and password on this screen!**

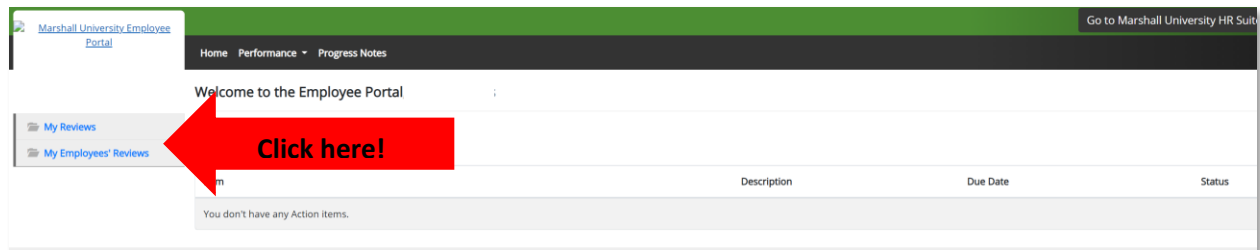


The image shows a login screen for the Marshall University Employee Server. At the top is the Marshall University logo, a green 'M' with 'MARSHALL' in white text on a black background. Below the logo is a red link that says "Marshall University Employee Server Log-In". A red arrow points to this link with the text "Click here!". Below the link are two input fields: "Username" and "Password". Below these fields is a blue "Log In" button. At the bottom of the screen, it says "Authenticate with single sign-on? SSO Authentication".

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).

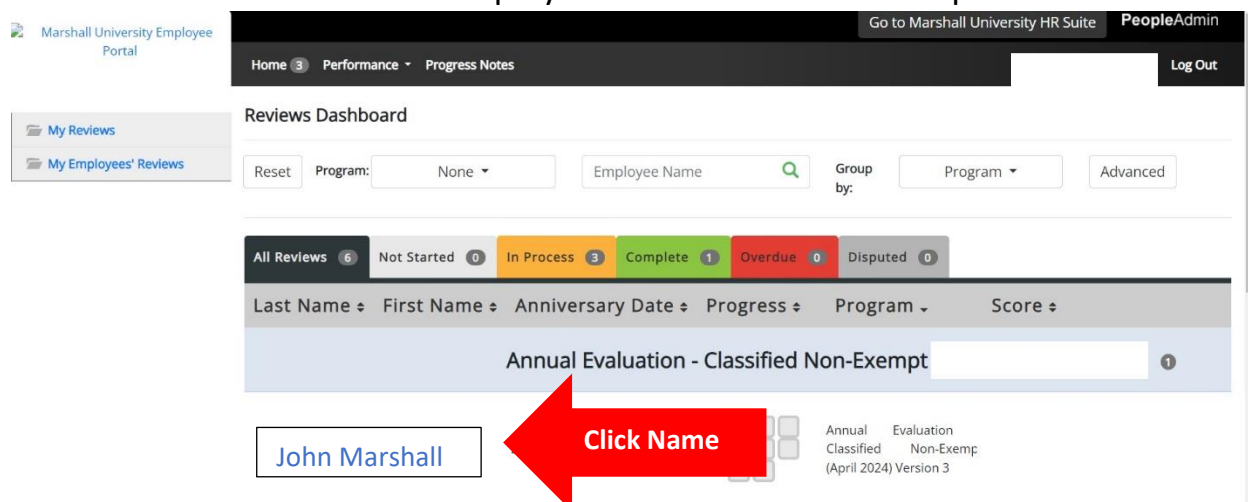


You will be routed to the Employee Portal for Performance Management. This page displays the items that require some action for you to complete.



## 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

Home 3 Performance ▾ Progress Notes

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	<a href="#">Supervisor Sets Plan</a>		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.

## Job Accountabilities

### 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

#### Quality, Health, and Safety

- Arrives on time and follows all policies and procedures.
- Produces high-quality work efficiently while meeting goals and deadlines.
- Stays focused and persistent when tasks are challenging, solving problems before they escalate.
- Prioritizes safety by sharing improvement ideas, participating in safety training, and reporting any incidents or hazards immediately.

### Competency

#### Customer Focus

- Resolves issues and supports customers, even when their needs change unexpectedly.
- Builds positive relationships with all customers—including those who may be difficult—and becomes a trusted, dependable resource.
- Communicates clearly and respectfully when requests cannot be fulfilled and seeks assistance when needed.
- Strives to exceed expectations by delivering excellent service to customers, including students, faculty, or clients.

### Competency

#### Efficiency and Flexibility

- Continuously looks for ways to improve work processes and embraces learning new tools or tasks.
- Manages multiple responsibilities effectively and remains composed during delays or sudden changes.
- Identifies potential issues early and communicates them promptly.
- Demonstrates patience and adaptability when plans shift, supporting the team in achieving goals during busy or stressful periods.

### Competency

#### Professional Development and Technical Knowledge

- Possesses strong job knowledge and uses technical skills to deliver outstanding results.
- Seeks opportunities to learn and stay current with the latest tools, methods, and industry updates.
- Maintains professionalism and composure when facing difficult or high-pressure situations.
- Completes all required training and keeps certifications and qualifications up to date.

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 ▾

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!**

Annual Evaluation  
Non-Classified and  
Classified Exempt

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## *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 left sidebar contains a menu with 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'History', 'My Reviews', and 'My Employees' Reviews'. The main content area is titled 'Mid-Year Check-In' and contains a descriptive paragraph. A red arrow points from the text 'Click here to complete!' to a blue 'Complete' button with an upward arrow icon.

Marshall University Employee Portal

Go to Marshall University HR Site

Home Performance Progress Notes

### 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	<a href="#">Supervisor Sets Plan</a>	Supervisor
2	<a href="#">Mid-Year Check-In</a>	Supervisor
3	Employee Self Evaluation	
4	<a href="#">Supervisor Evaluation</a>	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.
- 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.

**\* Rating**

Meets Expectations

Comments

Enter your rating here



**Competency:**  
Customer Focus

- Exhibits problem-solving abilities and flexibility in handling clients' 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 going above and beyond to achieve remarkable outcomes with total dedication to exceptional customer service that consistently exceeds students and clients' expectations.

\* Rating  
Meets Expectations  
Comments

Enter your rating here

**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 plans to accommodate changing business needs or during crisis situations, thus ensuring the smooth progression of work and the attainment of organizational goals.

\* Rating  
Meets Expectations  
Comments

Enter your rating here

**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 a high level of professionalism and composure when faced with crises, and other difficult matters in the work environment.
- Attends all training programs and maintains skills as required.

\* Rating  
Meets Expectations  
Comments

Enter your rating here

Click here to evaluate on goals!

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

## 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!

[Draft](#) [Complete](#)



***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.

Supervisor Meets with Employee

Click to Complete!

Complete



# *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 2<sup>nd</sup> Level Supervisor for approval.**