PeopleAdmin Performance Review Mini-Manual for Key Reps

See the Labor and Employee Relations page on the HRS site for additional details including the purpose of Performance Reviews and an overview of the performance review process. Contact your supervisor or Human Resource Services (HRS) at HRSinfo@uvm.edu or 802-656-3150 with any questions.

This guide is for Key Reps with "Performance User" access to their review program. It will show you how to create reports, re-open finalized reviews, and access reviews as the supervisor.

Contents

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Creating Reports

You can create reports to quickly identify which performance reviews have been completed.

1. Log into PeopleAdmin. Click on the yellow link to log in with your NetID and password. You will be required to login using multi-factor authentication (MFA). To set up your MFA, please see the ETS Knowledge Base page.

2. Change your user type to "Performance" and go to the Performance module.
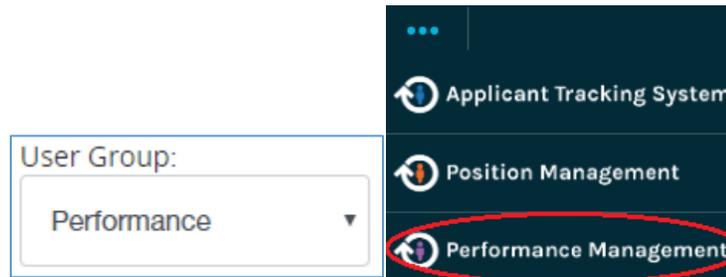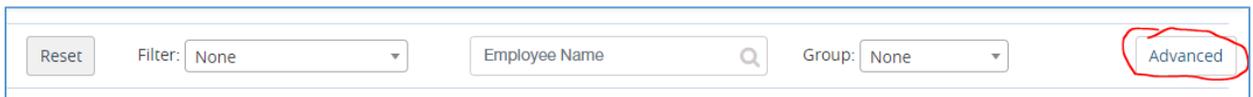

By default, the dashboard on this page will show you all the reviews for any active review program(s).

3. You can navigate the various tabs to see which of those reviews are completed or still in process.

4. To export this to an Excel sheet, start by clicking on the "Advanced" button.

5. Use the "Action" button that appears to Export the data.

Re-opening a finalized review

If, during the review process, a mistake is made and not discovered until after the review is completed and acknowledged, you can re-open that task to allow for correction and re-acknowledgement.

1. Log into PeopleAdmin. Click on the yellow link to log in with your NetID and password. You will be required to login using multi-factor authentication (MFA). To set up your MFA, please see the ETS Knowledge Base page.

2. Change your user type to "Performance" and go to the Performance module.
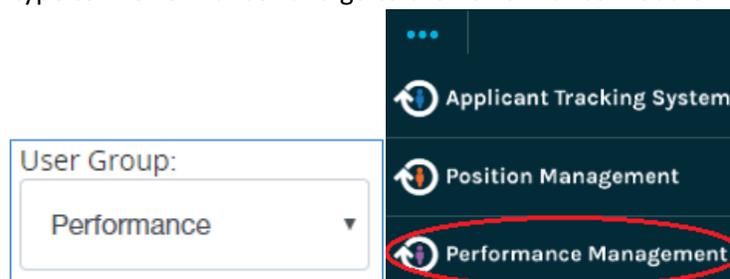
By default, the dashboard on this page will show you all the reviews for any active review program(s).

3. Find the review you need to reopen in the list on the dashboard. Click on it to open it.

4. Identify the task in the list that you want to re-activate and use the "Actions" drop-down and choose to "Re-open" it.

Step	Prerequisites	Last updated	Open date	Due date	State	Actions
Supervisor Initiates Review Plan	None	09/21/2016 08:58 AM	09/14/2016	09/28/2016	Complete	Actions ⌄
Supervisor Review	Supervisor Initiates Review Plan	10/01/2016 11:51 AM	09/14/2016	09/28/2016	Complete	View Plan (Step 1)
Self Review	Supervisor Initiates Review Plan	09/26/2016 09:59 AM	09/14/2016	09/28/2016	Complete	Re-open task
Review Meeting/ Final Approval	Supervisor Review	10/01/2016 11:51 AM	09/14/2016	09/28/2016	Complete	Actions ⌄

NOTE If you are reopening the Employee Acknowledgement step, you must also reopen the Supervisor Acknowledgement step.

5. Make sure whoever completes the edits also completes and acknowledges the review that was edited so it shows up as complete on your reports.

Accessing a Review on Behalf of the Supervisor

You can log into the performance review site as a supervisor in one of your assigned departments. You may want to do this in order to:

- Find and print/download a past review;
- Add a co-reviewer on behalf of the supervisor; or
- Complete reviews on their behalf (the system will note that it was you who completed it).

1. Log into PeopleAdmin. Click on the yellow link to log in with your NetID and password. You will be required to login using multi-factor authentication (MFA). To set up your MFA, please see the ETS Knowledge Base page.
2. Change your user type to "Performance" and go to the Performance module.
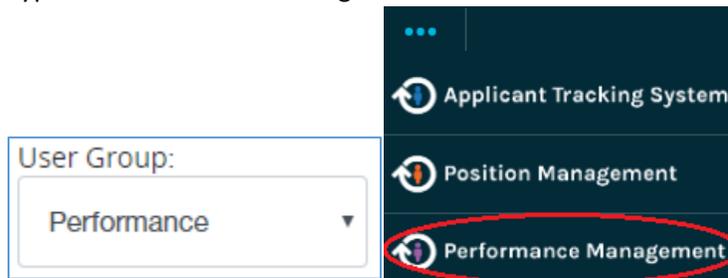
3. Click on the Reviews tab at the top.
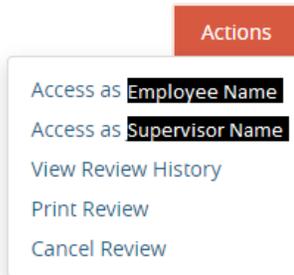
4. By default, you will see a list of <u>open</u> reviews only.
   a. If needed, use the "More Search Options" button to include both Open and Completed reviews and click "Search".
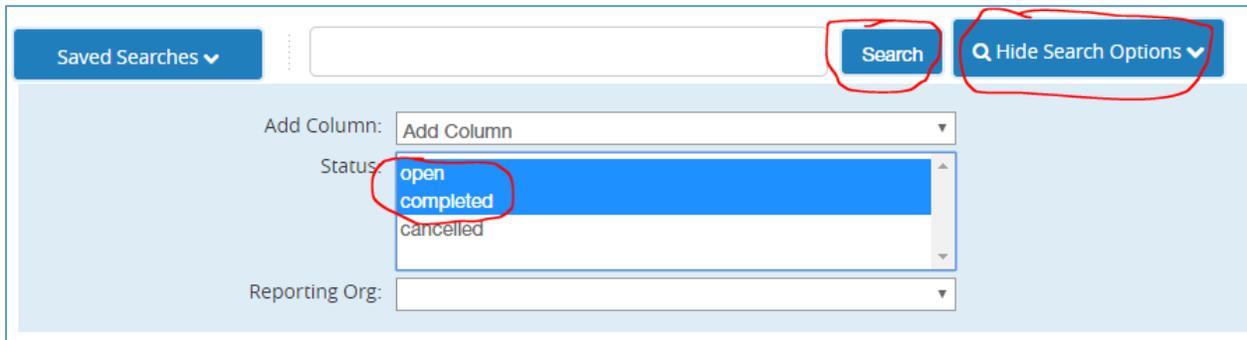
5. Find the employee whose review you need to access; click on their name.

6. Use the "Actions" button in the upper right to "Access as [Supervisor Name]".

7. Once logged in as the supervisor, you can use the Supervisor Mini Manual or Supervisor Guide Video to perform any actions that you need.