Performance Management Training
Department of Public Safety (COAM & POAM)

Agenda

Process Overview
Logging into Performance Management
Navigating
Completing your actions
How to Access the Supervisor and Employee Performance Portal

Direct link: https://grandvalleysu.pageuppeople.com/
Human Resources website: www.gvsu.edu/hro

Welcome to GVSU Performance

• Employees will use *My Performance Review*

• Supervisors will use *My Performance Review* for your own review and *Team Performance Reviews* to locate your employees
COAM and POAM Evaluation Process

Two Review Processes
  COAM Annual
  POAM Annual

Steps
✓ Step 1 - Employee Identifies Goals & Job Responsibilities
✓ Step 2 - Supervisor Reviews/Approves Goals
✓ Step 3 - Supervisor Completes Evaluation
✓ Step 4 - Supervisor/Employee Review Discussion
✓ Step 5 - Employee Acknowledges Evaluation
✓ Step 6 - Supervisor Reviews Final Acknowledgement
✓ Step 7 - Evaluation Complete

Step 1 – Employee Identifies Goals & Job Responsibilities

- The employee will receive an email notification
- They will log in – their review will have green New Button
- Click on the Title
Starting a New Evaluation Form and the Sections

Section 1 – Goals and Projects

Employees will enter their goals and projects

Employee instructions:
The content of the Goals & Projects section is intended to facilitate conversation between you and your supervisor. It will not be rated during the evaluation process. This gives you and your supervisor the opportunity to discuss your goals and projects for the upcoming review period. Once you have added your goals and projects, your supervisor will review and approve them for the upcoming review period, or modify them as needed.

For each goal or project, click the “Add Goals & Projects” button below and complete the box that appears.
Section 2 - Job Knowledge and Responsibilities

Review the Job Knowledge and Responsibilities and add additional ones, if desired

Employee Instructions:

Please review the job knowledge and responsibilities that are included on your review. You can add additional ones, these can be taken from your job description or your understanding of your expectations for your position. Your supervisor will review these items for the coming assessment period for approval.

- For each job knowledge and responsibility, please click on the “Add job knowledge & Responsibilities” button below and enter information into the box that appears.
- In the “Title” field, input a brief description of the job knowledge or responsibility (e.g., customer service at the front desk of the office).
- Upload a supporting document with the “Upload Document” button, if desired.
- After you’ve entered each job knowledge and responsibility, they will save automatically. If edits are needed, you can either edit the fields or select the trash can icon in the upper right-hand corner to remove.
- Click “Next” to move on to the next step.

Supervisor Instructions:

Please review the job knowledge and responsibilities submitted by your employee and discuss any necessary changes as needed. If you would like to move an employee back one step in the process, visit the Performance Management Toolkit for instructions.

Section 3 - University Competencies

Review the Competencies that they will be rated on

University Competencies

Employee Instructions:

You will be evaluated annually on your alignment with each of the university competencies listed below. University competencies are set at an institutional level. Review the university competencies to understand the criteria on which you will be evaluated. During your self-assessment, rate and comment on each competency.

For MG employees there will not be a self-evaluation component for the university competencies.

Supervisor Instructions:

University competencies are set at an institutional level. Review the university competencies with your employee so they understand the criteria on which you will evaluate them. During the assessment of your employee, rate and comment on each competency. If you would like to move an employee back one step in the process or review rating scale descriptions, visit the Performance Management Toolkit for instructions.

Click on the Go To Next Step button to move to the next step.

- Quality of work
  - generate quality work at appropriate quantity levels, meeting timelines, including accuracy, thoroughness, effectiveness and dependability
  - make appropriate decisions considering potential impacts
  - manage work with appropriate planning, interaction with faculty/staff, students and other customers, and focus on quality
  - demonstrate accountability and a drive for results
Section 4 – Professional Development

Add Professional Development items

The content of the Professional Development section is intended to facilitate conversation between you and your supervisor. It will no longer be available during the evaluation process. This gives you and your supervisor the opportunity to discuss your development and career goals.

- For each development area, please click on the “Add Professional Development” button below and complete the box that appears.
- In the “Title” field, input a brief description of the development area (e.g., become more succinct in my communications or improve Microsoft Office skills).
- In the “Description/Measure” field, input additional details (e.g., by when, how you will know you’re successful, etc.).
- Upload a supporting document with the “Upload document” button, if desired.
- After you’ve entered each item, they will save automatically. If you later need to edit the item, simply update the text in any of your development areas and they will save automatically or you can select the trash can icon in the upper right-hand corner to remove.
- Click “Next” to move on to the next step.

Section 5 – Overall Rating

In the early part of the process no action will be required here, this will only be available during the rating period.

This information will be available during the evaluation phase. No action is required at this time. Click “Next” to move on to the next step.
Step 2 - Supervisor Reviews/Approves Goals

- The Manager will receive an email notification
- The Manager will log in and go to Team Performance Reviews
- Locate the specific employee
- Click on the down arrow
- Click on the Title of the review for that employee

Supervisors View of the Employee Evaluation

Supervisor Specific - Start Page Instructions
Section 1 – Goals and Projects

Supervisors will be able to view the employees information and add additional information, if desired.

Click the add Goals & Projects button if you wish to add a goal

Section 2 - Job Knowledge & Responsibilities

Review the items listed

Click the add Job Knowledge and Responsibilities button if you wish to add additional items
Section 3 – University Competencies

Review the Competencies that the employee will be rated on

Supervisor Instructions:

University competencies are set at an institutional level. Review the university competencies with your employee so they understand the criteria on which you will evaluate them. During the assessment of your employee, rate and comment on each competency. If you would like to move an employee back one step in the process or review rating scale descriptions, visit the Performance Management Toolkit for instructions.

Click on the Go To Next Step button to move to the next step.

- **Quality of work**
  - generate quality work at appropriate quantity levels, meeting timelines, including accuracy, thoroughness, effectiveness and dependability
  - make appropriate decisions considering potential impacts
  - manage work with appropriate planning, interact with faculty/staff, students and other customers, and focus on quality
  - demonstrate accountability and a drive for results

- **Customer Service**
  - think of students, parents, visitors, faculty and staff as customers
  - demonstrate commitment to all customers through respect, knowledge, responsiveness and courtesy
  - build long-term customer relationships by anticipating, listening to, understanding, effectively communicate with and meeting or exceeding our customers’ needs
  - meet individual needs, paying particular attention to people from diverse backgrounds

Section 4 - Professional Development

You can review the information that the employee added and/or add additional ones

Supervisor Instructions:

Please review the development areas input by your employee and discuss any necessary changes as needed. If you would like to move an employee back one step in the process or review rating scale descriptions, visit the Performance Management Toolkit for instructions.

Click "Next" to move on to the next step.

<table>
<thead>
<tr>
<th>Item title</th>
<th>Description/Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend Training</td>
<td>attend more training this year</td>
</tr>
</tbody>
</table>
Section 5 – Overall Rating

In the early part of the process no action will be required here, this will only be available during the rating period.

Journaling

There is a period between steps in the review process where there is no required entry in the system. This period is set up so your employee can work on meeting their goals. During this period, both the supervisor and the employee can log in at any time and add Journal entries.

You will receive system notifications when action is required.
Journaling

Supervisors and the Employees can also use the Everyday Performance app to log Journal entries.

Journal your performance

Observe and capture everyday successes in words (and photos), record conversations and keep track of your progress. Journal is available in desktop and mobile app.

Step 3 – Supervisor Completes Evaluation

The supervisor will receive an email notification – they will log in

- Go to Team Performance Reviews
- Locate the employee
- Click on the down arrow
- Click on the Title

Employee Performance has completed their self assessment, it is now ready for you to review and begin the supervisor assessment.

The supervisor assessment includes your employee’s self assessment ratings and comments. It provides opportunities for your comments and ratings in the same document. Once you’ve complete the supervisor assessment, please schedule a discussion meeting with your employee.

Your deadline to complete this task is 13 Jan 2022.
Step 3 – Supervisor Completes Evaluation

• Supervisors will rate Job Knowledge & Responsibilities, University Competencies, and provide an Overall Rating
• Supervisors will be able add comments to all areas

New Rating Scales

**Exceeding (E)**
- Includes individuals who significantly and consistently exceed expectations and role requirements. Exceeds goals set for the year.
- Demonstrates exceptional depth and breadth of role knowledge.
- Demonstrates exemplary conduct for other supervisors/staff members to emulate; highly regarded by others within the University community.
- Exceeds customer’s expectations on a consistent basis.

**Succeeding (S)**
- Includes individuals who consistently meet and occasionally exceed expectations and role requirements.
- Meets goals set for the year.
- Possesses sufficient depth and breadth of role knowledge.
- Exhibits professional interactions with peers, customers, managers, and/or students.
- Provides accurate and timely assistance to peers, customers, managers, and/or students on a consistent basis.

**Developing (D)**
- Includes new employees who are still learning specific skills or key job responsibilities. Not a reflection on the employee’s skills, but simply a product of time in the position.
- Needs to gain proficiency in certain skills, knowledge, processes, speed, and/or job standards due to new process.
- Makes a visible effort to improve. Requires support/direction, however, performance demonstrates the ability to meet expectations.
- Makes a conscious effort to demonstrate professional interactions with peers, customers, managers, and/or students.
- Demonstrates a willingness to learn from mistakes in order to adapt conduct effectively.

**Needs Improvement (NI)**
- Demonstrates inconsistent required role knowledge and does not fully perform all requirements and duties.
- Meets the minimal standards for quantity or quality; often misses deadlines, work is regularly incomplete.
- Takes little to no initiative, even with prompting.
- Requires more than the expected level of supervision due to lower quality work required to complete role successfully.
- Demonstrates inconsistent and/or unprofessional interactions with peers, customers, managers, and/or students.
Step 7 – Supervisor Completes Evaluation

Lastly, you will be required to add Manager Final comments

Step 4 – Supervisor/Employee Review Discussion

At this step, the employee and supervisor will meet to review the combined comments and the review.

Once complete the employee will have the opportunity to acknowledge their review
Step 5 – Employee Acknowledges Review

- The employee will receive an email notification
- They will log in
- Go to My Performance Review
- Click on the Title
- Employees can review the evaluation and add their final comments on the Next Step tab

Step 6 – Supervisor Reviews Final Acknowledgement

- The supervisor will receive an email notification
- They will log in
- Go to Team Performance Review
- Locate the Employee
- Click the Down Arrow
- Click on the title
- Supervisor can see their final comments and add additional comments, they will also be able to see any employee final comments on the Next Step tab
Step 7 – Evaluation Complete

How to View a Completed Review

Employee View
Log Into the Performance Portal

Go to About Me – Performance Reviews

Change Status to Complete or All and search

Find your Review and click on View Report

Supervisor View
Log Into the Performance Portal

Go to My Team – Performance Reviews
Step 7 – Evaluation Complete

Supervisor View

Change Status to Complete or All and click Search

Locate your employee and click on View Report

Let's go look at the site

Thank You