Step-by-Step Instructions for PeopleAdmin
http://hr.uark.edu/Overview_and_Instructions_-_Modify_Certify_Evaluate.pdf

INSTRUCTIONS – MODIFY, CERTIFY, EVALUATE

There are three primary steps in PeopleAdmin relating to building the job description, setting up performance standards, and conducting a performance evaluation. In order to function properly, it is critical that these three steps must be performed in order and each step completed prior to starting the next step. The three primary steps in utilizing PeopleAdmin for position management include the following:

**Step #1 - Modification of Existing Position Description** - this necessary step is the equivalent of building the job description, and replaces the old Position Classification Questionnaire (PCQ) form. *It is the foundation for every other action taken in PeopleAdmin.* Information supplied in this step will feed forward into every other action taken in PeopleAdmin. Without this step, other steps will not function and display correctly. The Modification step defines job duties and their percentages, and may be performed by the Department/Unit User, Department/Unit Authority, or Approving Authority.

To initiate the Modification of Existing Position Description, the user must be logged in with the appropriate user type (Department/Unit User, Department/Unit Authority, or Approving Authority). To set the correct user type, select Change User Type under the Admin heading at the bottom of the left-hand navigation panel. Also, the user must have Department View. This information can be determined by looking at the “welcome box” just below the red PeopleAdmin banner. (User View is the narrowest view possible and will not allow the user to view information other than his own.) To set the correct view, select Change Default View under the Admin heading at the bottom of the left-hand navigation panel.

- In the left-hand navigation panel, under Position Descriptions, select Begin New Action.
- Select Modify Existing Position Description, then Start Action.
- Enter the position number or employee’s last name or other identifier (it is not necessary to enter data in each box), then Search.
- Under the title displayed, select Start Action (View Summary is merely a “snapshot” of the information in this action and will not allow access to editable fields).
- Current Position displays the information as it is prior to making changes, so Continue to Next Page at the bottom right of the screen.
- Under the Change Requested Tab, select Update Job Duties.
- Using the Continue to Next Page button at the bottom of the page, progress from left to right across the tabs.
Under the **Position Details** tab, all information pertinent to the employee and position are displayed. Be sure that all required fields (fields with the red asterisk in the left margin) are completed. [NOTE: A trick that I use if I encounter a blank and need to look up information which may result in my “timing out,” is to enter a “placeholder” like TBD (to be determined) until I can get back to the document. That way I can continue working on it to the end, and Save Without Submitting. This is added insurance that data won’t be lost. Then when you want to return to the document, rather than Begin New, you would Search Actions and go in thru the Edit link above the top black bar.]

- Under **Job Duties**, select the **Add New Entry** button, and add percent of total time, the notation regarding essential duties for ADA purposes, and the duty itself. Again, **Add New Entry** until all duties have been added.

- The tabs for **Additional Position Details** and **Working Conditions** come almost verbatim from the old PCQ form. Be sure and enter information for any block with the red asterisk.

- Under the **Budget Information** block, enter all required information.

- The **Supplemental Documentation** tab allows the user to attach any pertinent documents, such as the organizational chart, Hiring Request form, etc.

- User and approvers may offer any pertinent comments under the **Comments** tab.

- At this point, **Continue to Next Page**, and either **Save Action Without Submitting** or **Send Action** forward to the next approver up the chain.

NOTE: The “target chain for position-related actions (Request for New Position, Modification of Existing Position Description, Posting, etc.) is Department/Unit User; Department/Unit Authority; Approving Authority; University HR. The department can include two additional user types, who will be able to review only (Budget Authority and Executive Authority.]
Step #2 - Certification of Standards – this step builds on Step #1 - Modification of the Existing Position Description. The Certification replaces the first half of the old paper evaluation form (in which standards were displayed, employee and supervisor would review standards, and both would sign the top half of the signature page, indicating that the employee understood the supervisor’s expectations of him/her for the upcoming year). In PeopleAdmin, the Certification step must be initiated by the Evaluation Supervisor, and Standards should be entered only after duties have been entered (Step #1).

To create Position Standards, the Evaluation Supervisor user must be logged in correctly. Check the welcome box to make sure User Type is Evaluation Supervisor and Default View is Department View. If this option is not available for selection, please call Human Resources to correct the problem.

- In the left-hand navigation panel, under Position Descriptions, select Begin New Action.
- Select Certify Position Standards, then Start Action.
- Enter the position number or employee’s last name or other identifier (it is not necessary to enter data in every box), then Search.
- Under the title displayed, select Start Action (View Summary is a “snapshot” of the information in this action and will not allow access to editable fields).

- Current Position displays the information as it is prior to making changes, so Continue to Next Page at the bottom right of the screen.
- Continue to page forward, left to right, adding information in any required block (indicated by a red asterisk in the left margin).
- On the Job Duties tab, you will see columns indicating Percent of Total Time and Responsibility/Duty. In the Percent column, select the Edit link to open up a box for entry of the standard for each duty or responsibility.
- In the standards box, enter a standard of performance and a method of measurement for each duty or responsibility. (This information may be typed, or if the electronic copy is available, you may cut and paste information into the box.)
- Save Changes after each entry.
- When this page is complete, Continue to Next Page.
- Self Management is one of the new areas of the online evaluation which accounts for 20% of the total evaluation rating. Suggested wording is displayed, and a statement must be crafted indicating a standard of performance in this area. When complete, Continue to Next Page.
• Support of University Goals/Initiatives is another new area accounting for 10% of the total evaluation rating. Again, a statement must be entered indicating a standard of performance in this area. When complete, Continue to Next Page.

• Under the Certification tab, “electronic signatures” are added, indicating that all parties have read and understand the standards of performance. When the Supervisor creates the document, the first blank will be visible indicating “these standards were established in consultation with the employee.”

• The last tab displays the history of this action. Continue to Next Page, where the individual creating the evaluation will be able to Save Without Submitting, or Send Position Standards to Employee to Certify.

[NOTE: the “target chain” for evaluation-related actions (Certification of Position Standards and Evaluation) is Employee □Evaluation Supervisor □Evaluation Reviewer.]

While the flow of the Certify Position Standards process may be somewhat different from one department to another, the following steps apply across all departments.

Once the Certify Position Standards has been Sent to Employee for Review, the employee should:

• Log into PeopleAdmin as Employee.
• Select Pending Actions.
• Under the title, select View.
• Enter the document thru the Edit link above the top black bar.
• Read thru the document by clicking thru the tabs at the top, left to right, or by using the Continue to Next Page button at the bottom left of each page.
• On the Certification page, a set of radio buttons will display as responses to the statement “I have reviewed these standards and understand my performance will be measured against them.” The default response is No Response, but the employee MUST select Yes or No. Clicking this box results in a “digital signature,” and without this signature, the document is considered incomplete, or “not certified.”
• Continue to click to the last tab, Action History, then Continue to Next Page.
• At this point, the employee will be able to Save if more time is needed for review, or Send Position Standards for to Evaluation Supervisor for Final Review. When the employee has finished reviewing the document, the latter option should be selected.

Once the Certify Position Standards document has been sent to Evaluation Supervisor for Final Review, the supervisor should:

• Log in as user type Evaluation Supervisor, with Department View.
• Select Pending Actions.
• Under the title, click View.
• Enter the **Certify Position Standards** document through the **Edit** link just above the top black bar.
• Read thru the document by clicking thru the tabs at the top, left to right, or by using the **Continue to Next Page** button at the bottom left of each page.
• This final review will allow the supervisor to have another chance to “sign” the document electronically in the **Certification** blank.
• Clicking all the way to the end will bring up the Action Status section, with options to Save, Send Position Standards to the Employee to Certify, Send Position Standards to Evaluation Reviewer for Optional Initial Review, or Approve.
• The **Certify Position Standards** document should only be approved when all standards blanks have been completed and the “electronic signatures” have been captured. [NOTE: Position standards are approved within the department and do not require HR approval.]

Once the **Certify Position Standards has been Sent to Evaluation Reviewer for Optional Initial Review**, the reviewer should:

• Log in as user type **Evaluation Reviewer**, with **Department View** (NOT User View).
• Select **Pending Actions**.
• Under the title, click **View**.
• Enter the **Certify Position Standards** document through the **Edit** link just above the top black bar.
• Read thru the document by clicking thru the tabs at the top, left to right, or by using the **Continue to Next Page** button at the bottom left of each page.
• On the **Certification** page, a set of radio buttons will display as responses to the statement, “I have reviewed these standards and agree that they are appropriate for the position.” Select a response.
• Continue to click forward to the last tab, **Action History**, then **Continue to Next Page**.
• At this point, the options will be **Send Position Standards to Evaluation Supervisor for Final Review** or **Approve (Position Standards Certified)**.

**Step #3 - Evaluation** should contain information from the Modification of Existing Position Description (Step #1) and Certification of Standards (Step #2) and is the equivalent of conducting the paper-based evaluation, and should include results based on established standards, the appropriate rating, and electronic signatures on the second half of the signature sheet.

**To create the Evaluation**, the **Evaluation Supervisor** must be logged in with **Department View**:

• In the left-hand navigation panel under **Evaluations**, select **Begin New Evaluation**.
• Under **Classified Evaluation**, select **Start Action**.
• Again, enter position number, name, or other identifier, then **Search**.
• Under the title, **Start Action**.
• Under the **Evaluation Details** tab, make sure that all required information has been entered. **Rating Cycle** should be Annual. Indicate **Rating Period Begin Date** and **Rating Period End Date** of the current evaluation period. For instance, for an individual with a 10/01/10 merit eligibility date, the rating period would be 10/01/09 through 09/30/10. Notice that **Employee User Account, Evaluation Supervisor User Account, and Evaluation Reviewer User Account** are all required (*) information. If these are left blank, the action will not flow correctly to the appropriate approvers. [NOTE: If the individuals in the supervisor and reviewer blanks are not correct, please call Human Resources.] **Continue to Next Page.**

• Under the **Job Duties** tab, in the **Percent of Total Time** column, click the **Edit** link to open the boxes you will use to enter the ratings and results. Click one of the radio buttons to indicate the rating you are assigning to the duty, based upon the standards previously established. Also, enter a statement regarding specific performance indicators that lead to this rating. There is also a box for entry of additional rating comments, but this is not required information. **Save Changes** when the rating and results have been entered for each duty.

• Under the **Support of University Goals/Initiatives** tab, enter a rating and results, then **Continue to Next Page** when completed. [NOTE: On each of the ratings pages, clicking the **Calculate** button will display the cumulative score.]

• Under the **Overall Scores** tab, the cumulative score will display, along with the **Overall Rating Scale**, indicating the appropriate range of scores associated with each rating.

• Under the **Overall Rating Comments** tab, you will need to select the appropriate **Overall Performance Rating**. The overall rating must agree with the **Overall Rating Scale** displayed. A comment may be added regarding overall results. There is also a question regarding written reprimands, and a box to make additional supervisory comments.

• **Continue to Next Page.**

• **Goals for Next Year** is not required information, but it allows a supervisor to state specific goals for next year’s performance.

• The **Attach Documents** tab allows the supervisor to include letters, notes, and other supporting documentation from internal or external customers. At this point, **Continue to Next Page** to see the options available.

• Options are **Save Evaluation Without Submitting** or **Send Evaluation to Employee for Review** at this point.

• To save without submitting and return to the evaluation document at a later time, select **Active Evaluations**, add the position number and Search.

• Select **View**, and click on the **Edit** link above the top black bar to enter the editable fields in the document.

• When editing is completed, **Send Evaluation to Employee to Review**.
For the employee to review the Evaluation, the employee must log in as Employee:

- Select Active Evaluations.
- Under the title, click View.
- Enter the document through the Edit link just above the top black bar.
- Read thru the document by clicking thru the tabs at the top, left to right, or by using the Continue to Next Page button at the bottom left of each page.
- Under the Overall Rating Comments tab, the employee will have the ability to add comments.
- Some supervisors may have listed Goals for Next Year.
- Documents may be attached under the last tab, if desired.
- Continue to Next Page.
- The Employee will be able to Save or Send Evaluation to Evaluation Supervisor for Review.

For the supervisor to Review the Evaluation, the user type must be set to Evaluation Supervisor.

- Select Active Evaluations.
- Under the title, click View.
- Enter the document through the Edit link just above the top black bar.
- Read thru the document by clicking thru the tabs at the top, left to right, or by using the Continue to Next Page button at the bottom left of each page. If any changes are to be made, this is the time to make them.
- Continue clicking thru the document until the options appear.
- Options include Save, Send Evaluation to Employee for Review, Send Evaluation to Evaluation Reviewer for Final Review.

For the Final Review, the reviewer must make sure he/she is logged in as Evaluation Reviewer.

- Select Active Evaluations.
- Under the title, click View.
- Enter the document through the Edit link just above the top black bar.
- Read thru the document by clicking thru the tabs at the top, left to right, or by using the Continue to Next Page button at the bottom left of each page. If any changes are to be made, this is the time to make them.
- Under the Overall Rating Comments tab, there is a box for Reviewer Comments, if desired.
- Continue clicking thru the document until the options appear. Options may include Save, Send Evaluation to Employee for Review, Send Evaluation to Evaluation Supervisor for Review, and Send Evaluation to University HR.
- [NOTE: The final goal is to Send Evaluation to University HR.]