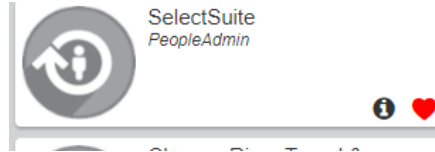


# COMPLETING THE PERFORMANCE PLAN - AP

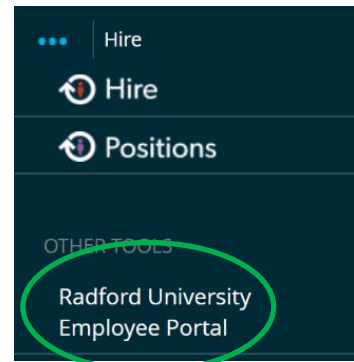
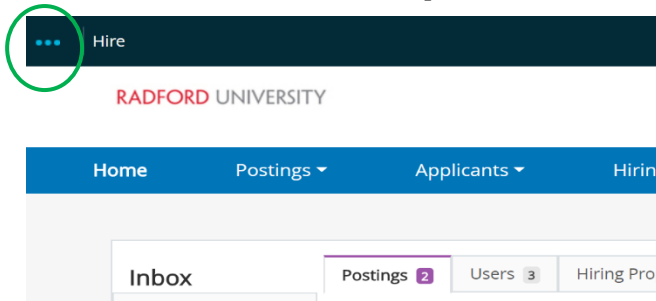
Rev. 11/2/2020

PeopleAdmin is part of Radford University's single sign-on. This means that it is accessible through your [OneCampus Portal](#).

1. Log into your [OneCampus](#) Portal using your Radford credentials. On the landing page of your Portal, select search for SelectSuite - PeopleAdmin. Click on the icon to open.



2. The landing page will usually appear as the Applicant Tracking page and the banner should be blue. No matter the page you land on, select the three blue dots on the top. From this menu, select the option Radford University Employee Portal



3. As you arrive on your **Home** screen, you will see your Action Items, which **this should include any plans that you may need to begin**. Start the plan by clicking on [Supervisor Creates Plan](#) next to the employee that you are creating a plan for.

Welcome to the Employee Portal,

## Your Action Items

Item	Description	Due Date	Status	Action
AP Program - Oct 25, 2017- Oct 24, 2018 for Geoffrey Gabriel	<a href="#">Supervisor Creates Plan</a>	n/a	Pending	<a href="#">View</a>
Classified Program - Oct 25, 2017- Oct 24, 2018 for Alicia Dials	<a href="#">Supervisor Creates Plan</a>	n/a	Pending	<a href="#">View</a>
Classified Program - Oct 25, 2017- Oct 24, 2018 for Harriet Lewis	<a href="#">Reviewer Acknowledges Plan</a>	n/a	Pending	<a href="#">View</a>
Classified Program - Oct 25, 2017- Oct 24, 2018 for Larry Ashby	<a href="#">Supervisor Creates Plan</a>	n/a	Pending	<a href="#">View</a>
Classified Program - Oct 25, 2017- Oct 24, 2018 for Laura Viers	<a href="#">Supervisor Creates Plan</a>	n/a	Pending	<a href="#">View</a>

Showing 1 to 5 of 5 entries

# COMPLETING THE PERFORMANCE PLAN-AP

4. The first tab you will land on is the **Introduction/Glossary** Tab. No changes are needed on this tab. Review as needed. Select the Next option.



5. The next tab you will land on is the **Position Description** Tab. No changes are needed on this tab as they are automatically populated from the Position Description. Review as needed. Select the Next option.



6. The next tab you will land on is the **Special Assignment** Tab. If your employee has a special assignment, (a task that is assigned that is not part of the core responsibilities and would not carry over from year to year) input the assignment details in this block. If you need to add additional assignments, select **Add Entry** and continue to input the assignment details for each block as needed. When you have finished adding all of your Special Assignments, Select **NEXT** when finished.

A screenshot of the "Special Assignment(s)" tab. At the top, there are navigation tabs: "Introduction/Glossary", "Position Description", "Special Assignment(s)", "Performance Factors", and "Professional Development". Below these is a "Check spelling" link. The main content area is titled "Special Assignment(s)" and contains a section for "Duties/Responsibilities and Expectations". Inside this section, there is a text box containing the text: "Compose a 2018 region wide consortium on resources available for Diversity and Equity Training". Below the text box is a "Remove Entry?" checkbox. At the bottom left of the section is a blue "Add Entry" button. At the bottom right of the entire page are two blue buttons: "Save Draft" and "Next >". The "Next >" button is circled in blue.

7. The next tab you will land on is the **Performance Factors** Tab. Universal Performance Factors will automatically populate here. Review as needed. Select the Next Option.

A screenshot of the "Performance Factors" tab. At the top, there are navigation tabs: "Introduction/Glossary", "Position Description", "Special Assignment(s)", "Performance Factors", and "Professional Development". Below these is a "Check spelling" link. The main content area is titled "Performance Factors" and contains a section for "Name" with the text "Leadership, Initiative & Problem Solving". Below the name is a "Description:" field with the text: "- Exemplary: Takes responsibility for all aspects of job; frequently seeks out improvements or enhancements to work; brings forth".

# COMPLETING THE PERFORMANCE PLAN-AP

8. The next tab you will land on is the **Professional Development** Tab. If your employee has areas in which the employee would benefit from more training; training that is essential to the employee's core responsibilities; or areas of development that interest the employee, add those items here. Select **NEXT** when finished.

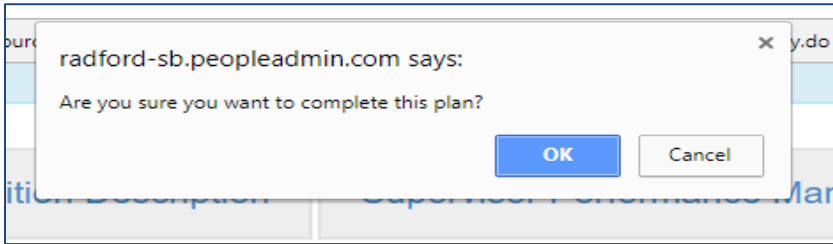
The screenshot shows the 'Professional Development' tab selected in a navigation bar. Below the navigation bar, there are tabs for 'Introduction/Glossary', 'Position Description', 'Supervisor Performance Management', 'Special Assignment(s)', and 'Professional Development'. Under 'Professional Development', there is a sub-tab for 'Individual Goals'. The main content area is titled 'Professional Development' and contains a section for 'Personal Learning Goals'. This section has two text input fields: the first contains 'Increase level of Microsoft Excel skills to Expert level.' and the second is titled 'Learning Steps/Resource Needs' and contains 'Take additional courses in Excel through the Lynda.com'. Below these fields is a 'Remove Entry?' checkbox. At the bottom right of the form, there are two buttons: 'Save Draft' and 'Next >'. The 'Next >' button is circled in blue.

9. The next tab you will land on is the **Individual Goals** Tab. This can include objectives in terms of complexity, accountability and results that are specific, measurable, attainable and relevant (SMART goals.) Add these items here. A due date can be added if needed. If you need to add additional Goals, select **Add Entry** and continue to input the details for each block as needed. When you have finished adding all of your goals, Select **Save Draft** or **Complete** when finished.

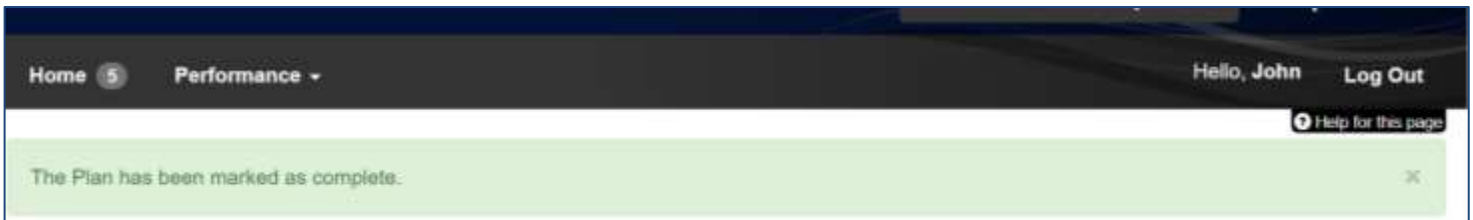
The screenshot shows the 'Individual Goals' tab selected in a navigation bar. Below the navigation bar, there are tabs for 'Introduction/Glossary', 'Position Description', 'Supervisor Performance Management', 'Special Assignment(s)', and 'Professional Development'. Under 'Professional Development', there is a sub-tab for 'Individual Goals'. The main content area is titled 'Individual Goals' and contains a section for 'Goals'. This section has two text input fields: the first is for the goal description and the second is for the 'Due Date'. Below these fields is a 'Remove Entry?' checkbox. At the bottom left of the form, there is an 'Add Entry' button circled in green. At the bottom right, there are two buttons: 'Save Draft' and 'Complete', both circled in blue.

# COMPLETING THE PERFORMANCE PLAN-AP

10. If you select the **Complete** button, the following prompt will ask again if you want to complete this plan. (This is final and will send the Plan to the Step #2 The Reviewer Acknowledges Plan.) If yes, select **OK**.



11. You should see the following green message appear at the top of the Page.



12. The Plan has now been moved to Step #2, **The Reviewer Acknowledges Plan**.

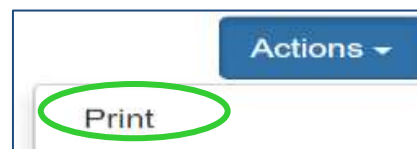
After Step #2 is completed (The Reviewer has acknowledged the plan), Step #3 will need to be completed. This is the **Meeting to Review Plan with Employee**. This is a manual step.

13. **Step #3 Meeting to Review Plan with Employee.**

1. Set up the meeting with employee.



2. **Print** the plan before the meeting.



3. Discuss the plan with the employee to ensure they understand the expectations.

4. **If after** discussion with the employee, it is decided that changes need to be made to the plan, the plan must be **\*revised**. **Note:** This can only be done at *this* stage if you **have not** sent the plan to the employee before you held the meeting. **Also note**, that if you make a revision, it will go back to the Reviewer to acknowledge again. *If there are no revisions to be made, go to #5 on page 6*

## To **Revise** the plan

a. Beginning on your **Home** Screen, select screen.



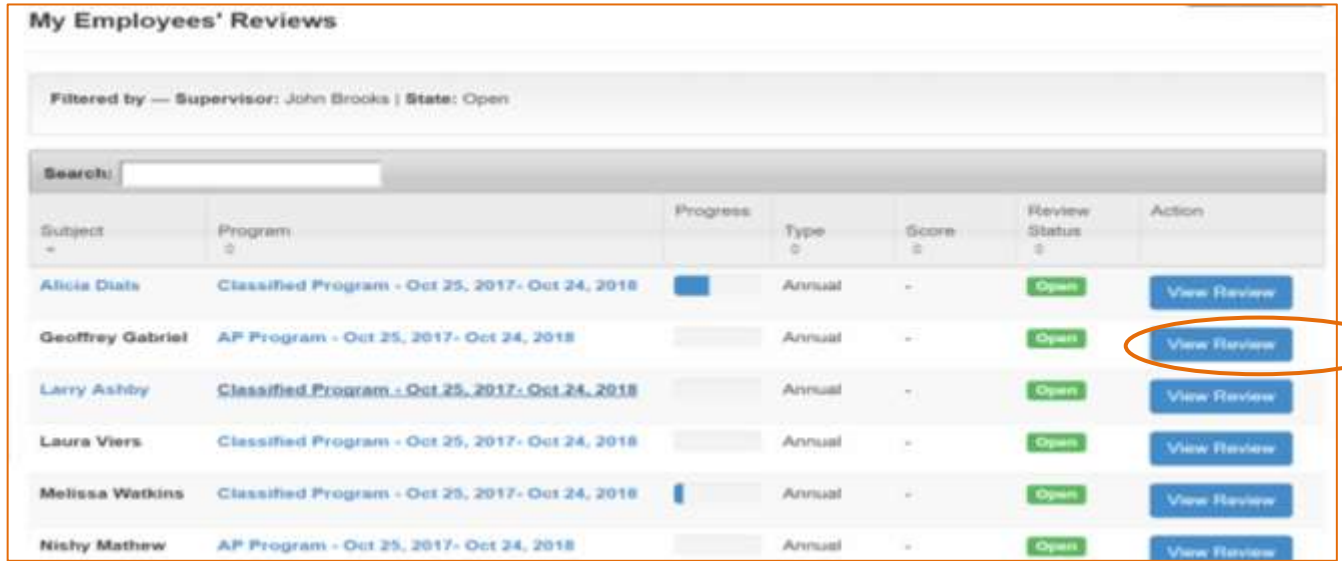
at the left side of the

# COMPLETING THE PERFORMANCE PLAN-AP

- b. Click on the drop down menu beside **Subject** and select the employee's name that you are working on.



- c. You should now see the employee's name in the center screen (see below). Click on **View Review**

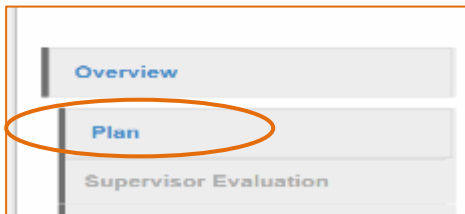


My Employees' Reviews

Filtered by — Supervisor: John Brooks | State: Open

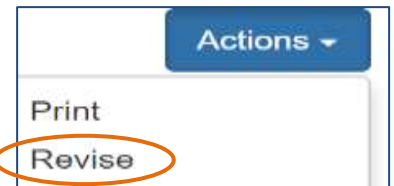
Search:

Subject	Program	Progress	Type	Score	Review Status	Action
Alicia Diats	Classified Program - Oct 25, 2017- Oct 24, 2018	<div style="width: 25%;"></div>	Annual	-	Open	<a href="#">View Review</a>
Geoffrey Gabriel	AP Program - Oct 25, 2017- Oct 24, 2018	<div style="width: 0%;"></div>	Annual	-	Open	<a href="#">View Review</a>
Larry Ashby	Classified Program - Oct 25, 2017- Oct 24, 2018	<div style="width: 0%;"></div>	Annual	-	Open	<a href="#">View Review</a>
Laura Viers	Classified Program - Oct 25, 2017- Oct 24, 2018	<div style="width: 0%;"></div>	Annual	-	Open	<a href="#">View Review</a>
Melissa Watkins	Classified Program - Oct 25, 2017- Oct 24, 2018	<div style="width: 10%;"></div>	Annual	-	Open	<a href="#">View Review</a>
Nishy Mathew	AP Program - Oct 25, 2017- Oct 24, 2018	<div style="width: 0%;"></div>	Annual	-	Open	<a href="#">View Review</a>



- d. On the left side of your screen, click **Plan**

- e. Click the Actions button on the right side of the screen, and click on



- f. After all of the revisions have been made, click on  located at the very bottom of your screen.

- g. The following message will appear at the top of your screen.

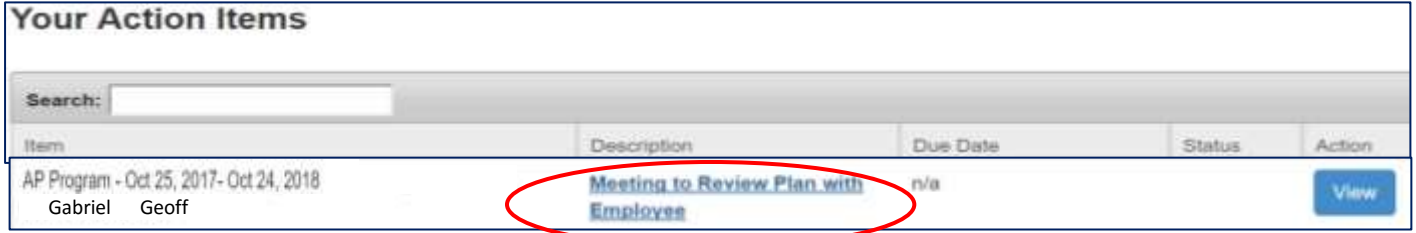


# COMPLETING THE PERFORMANCE PLAN-AP

- h. If you look at your Dashboard, you will notice the Plan is now back at Stage 2, **Reviewer Acknowledges Plan**.



5. After the meeting, if there are no revisions to be made, go back to your **Action** items on your **Home** screen and click **Meeting to Review Plan with Employee**



6. Click complete. By clicking complete, you are affirming that you had the meeting with the employee.



The Plan has now been moved to Step #4, **Employee Acknowledges Plan**.

After Step #4 is completed (The **Employee has acknowledged the plan**), you will be finished with the Plan. The next Step #5 Self-Evaluation, will not take place until the end of the Evaluation period.

Your Dashboard should look like this for this employee

