

Old Dominion University

Evaluation Process Classified

Supervisor's Guide Reviewer's Guide Employee's Guide

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Old Dominion University Evaluation of Classified Staff

SUPERVISOR'S (HIRING MANAGER) GUIDE



INTRODUCTION

Welcome to the Old Dominion University Classified Evaluation System. The Human Resources Department has implemented this system in order to automate the evaluation process.

You will use this system to:

Evaluate your non-probationary classified staff each fall.

The system is designed to benefit you by facilitating:

Up-to-date access to information regarding all positions under your supervision

The Human Resources Department is providing these training materials to assist with your understanding and use of this system.

Your Web Browser

PAPERS is designed to run in a web browser over the Internet. The system is compatible with Internet Explorer 6.0 and higher and Firefox Mozilla 2.0 and higher. The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

Please <u>do not</u> use your browser's "Back", "Forward" or "Refresh" buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.

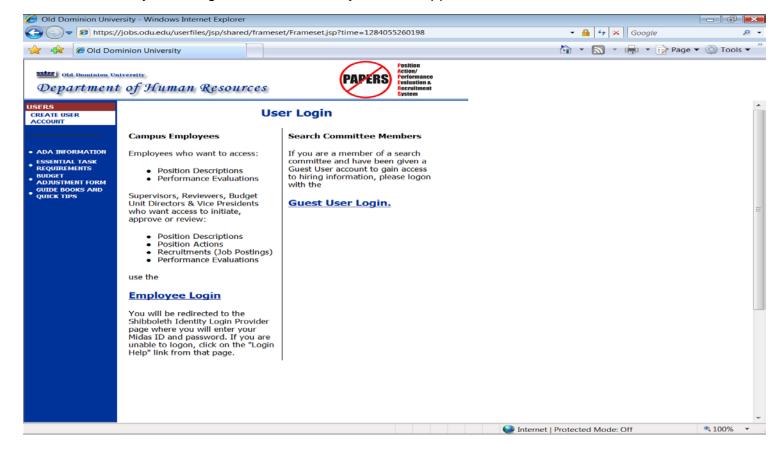
Security of Information

To ensure the security of the information in the system, it **will automatically log you out after 60 minutes if it detects no activity.** However, anytime you leave your computer, we strongly recommend that you save any work in progress and Logout of the system by clicking on the logout link located on the bottom left side of your screen.

GETTING STARTED

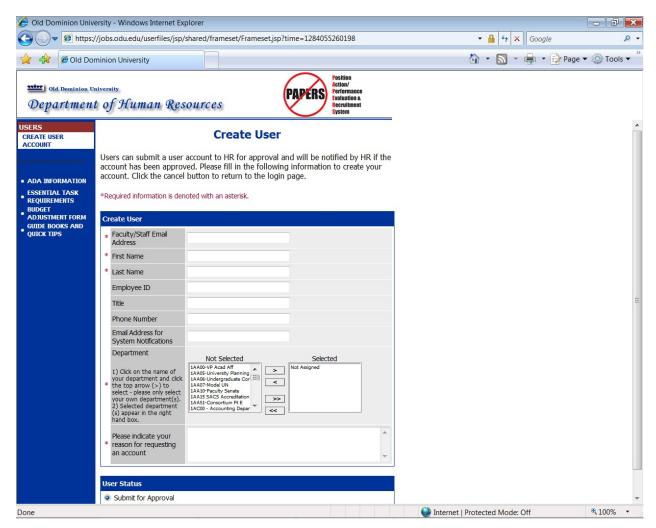
https://olddominion.peopleadmin.com/hr

After entering the URL, https://olddominion.peopleadmin.com/hr and pressing the Enter key, the "login screen" for the system will appear:



If you have NOT used the system before, go to page 5. If you have used the system before as a Hiring Manager for a recruitment or to create a new classified position or redefine or certify an existing classified position, enter your username and password. To begin an Evaluation action, you must be logged in with the user type of Hiring Manager. If you are also a classified Employee or a Reviewer, your user type may have defaulted to Employee or Reviewer, because you have multiple user types in the system. If the user type of Employee or Reviewer appears at the top of the screen, an option of Change User Type will be listed in the navigation bar on the left of the screen. Click on this link and change your user type to Hiring Manager. Also click on Change Default View and confirm that Department View is selected. (Go to page 6 of these instructions.)

If you are entering the site **for the first time**, you must create your own account by clicking on the **Create User Account** link in the navigation bar on the left of the screen. After you click this link, the following screen will appear:



Enter your faculty/staff email address, along with the rest of the requested information. Include comments as to why you are requesting an account.

After completing this form, click **Continue**, and you will be asked to review your information. After you have reviewed it and made any necessary corrections, click **Submit for Approval.** Then click on **Continue** and **Confirm.** Your request will then be sent to the Human Resources Department, which will approve your account.

Once Human Resources notifies you that your request has been approved, you will be able to login to the system with your user name and password. (This approval could take up to 24 hours.)

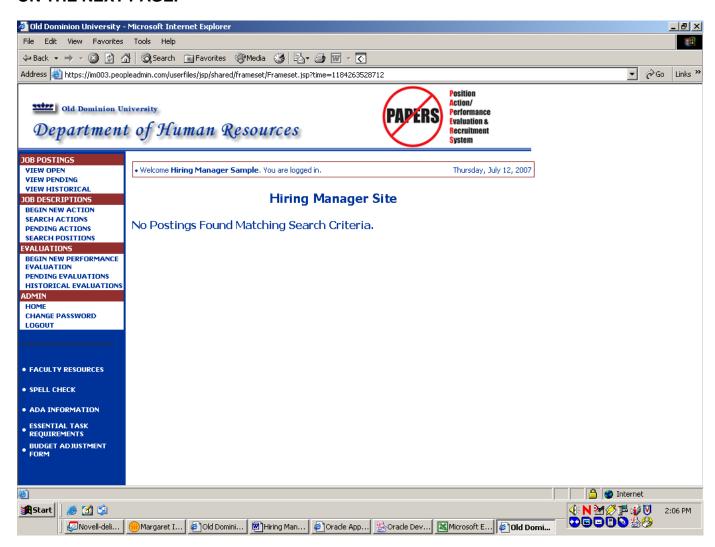
WELCOME SCREEN

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Upon logging in, the following screen will welcome you to the Position Action/Performance Evaluation and Recruitment System. (PAPERS)

PAPERS includes our on-line recruitment system. If there are pending recruitments for which you are the hiring manager, they will appear on this screen. If there are not any pending recruitments, the following message will appear: **No Postings Found Matching Search Criteria.** (This is a system message that we <u>cannot</u> block from appearing.)

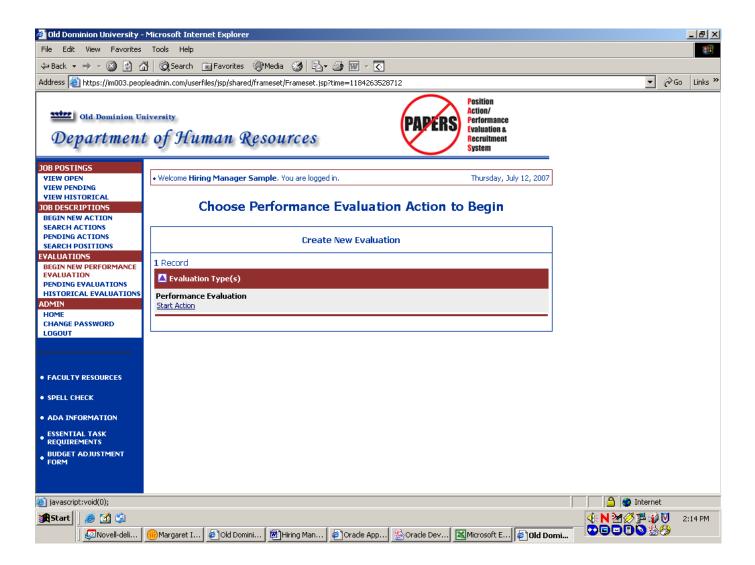
PLEASE DISREGARD THIS MESSAGE AND MOVE ON TO THE INSTRUCTIONS ON THE NEXT PAGE.



CLASSIFIED EVALUATION PROCESS

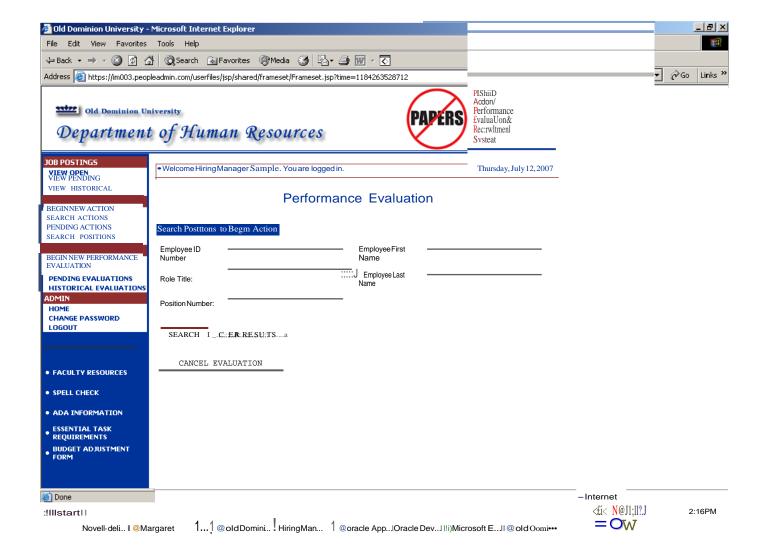
To begin the **Evaluation Process**, click on the **Begin New Performance Evaluation** link in the **Evaluations** section of the navigation bar on the left of the screen.

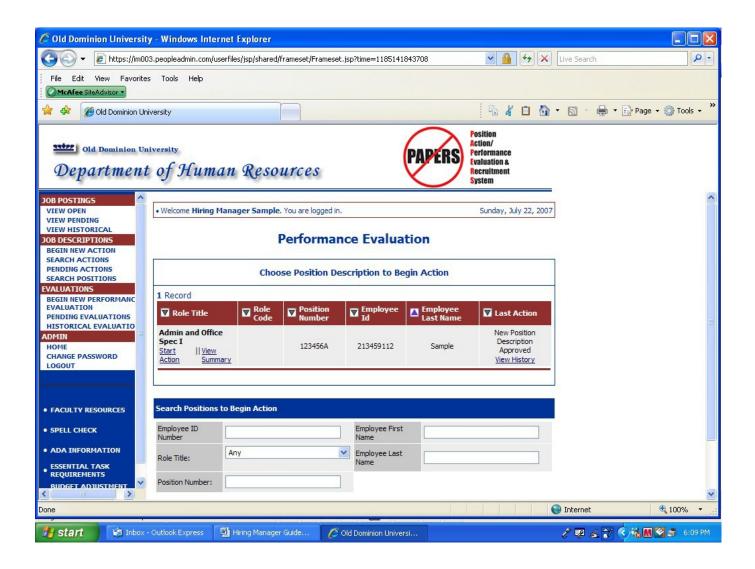
The following screen will appear:



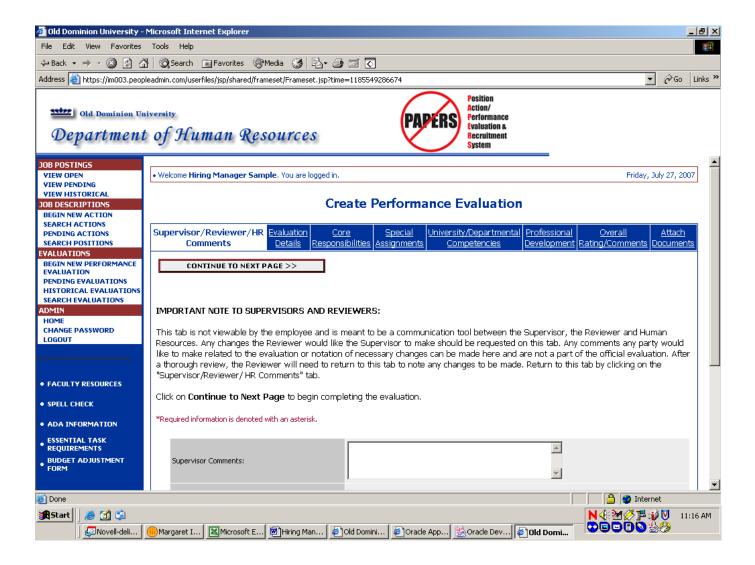
To continue, click on **Start Action** under Performance Evaluation.

The following screen will appear. Enter the employee's name or UIN, or position number and click on Search. (Note: You must include an A at the end of the position number, i.e. 00222A)



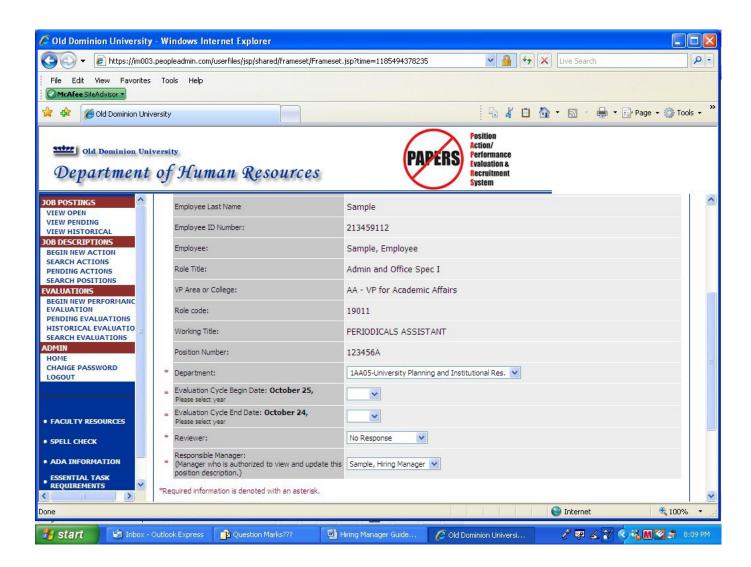


Click on Start Action under the Role Title of the position.



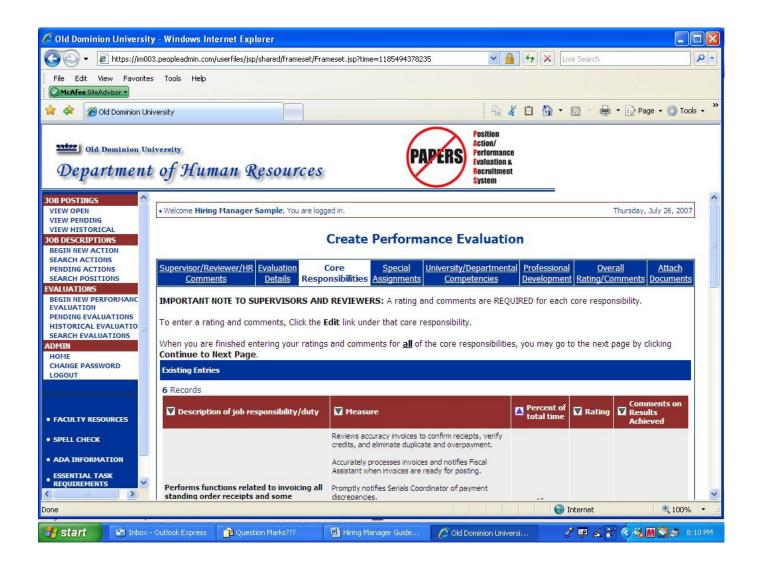
This first tab is not viewable by the employee and is meant to be a communication tool between the supervisor and reviewer. Any comments you would like to send to the Reviewer should be entered here. You may wish to return to this tab after entering all the evaluation details and adding the comments at that time. You would do this by simply clicking on the tab PRIOR to forwarding the evaluation to the Reviewer.

To begin completing the evaluation, click on Continue to Next Page.



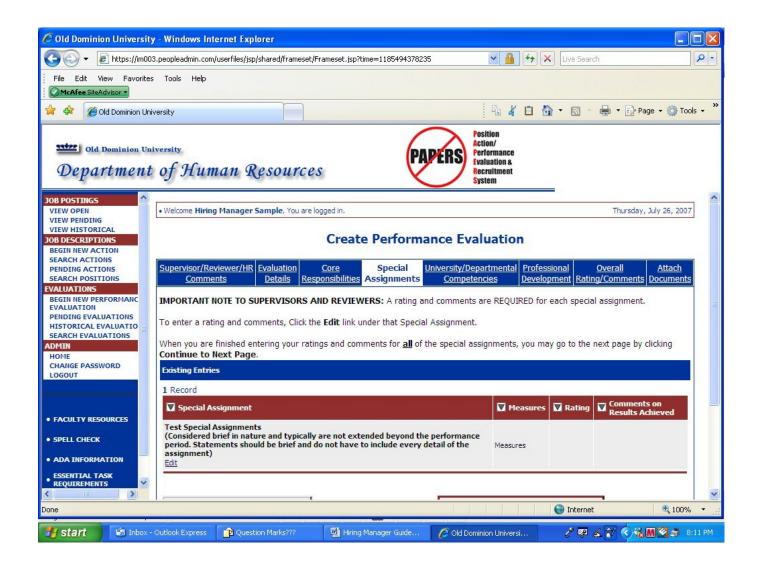
Some information will already be filled in and **cannot** be edited. However, **PLEASE NOTE THAT REQUIRED FIELDS WILL BE MARKED WITH AN ASTERISK.** Some of these fields will be filled but you will be able to edit them if necessary. If they are not yet filled, you **must** complete them. **YOU WILL RECEIVE AN ERROR MESSAGE AND YOU WILL NOT BE ABLE TO MOVE FORWARD IF YOU DO NOT COMPLETE EVERY REQUIRED FIELD.**

Please carefully read each field and make changes as necessary. If the information is accurate, you do not need to make any changes. Click on **Continue to Next Page** to begin completing the evaluation.



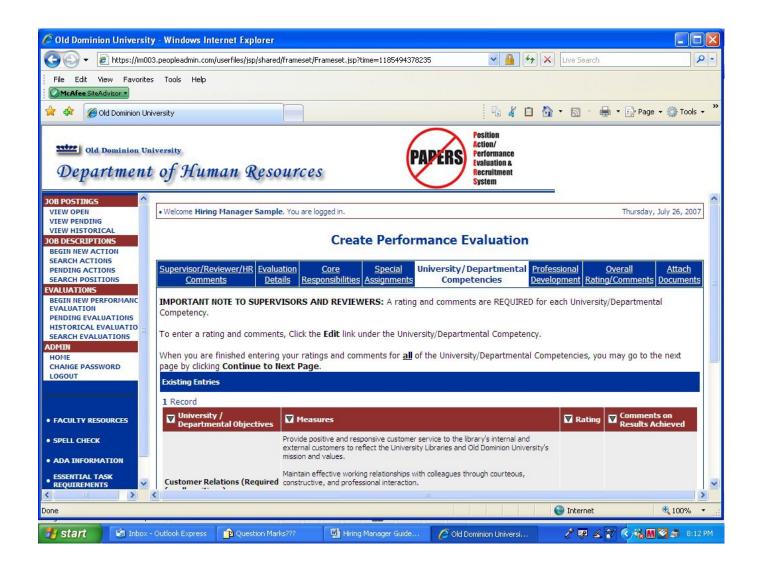
The Core Responsibilities in the employee's current position description will have defaulted into the evaluation. A rating and comments are REQUIRED for each core responsibility. To enter a rating and comments, Click the Edit link under that core responsibility.

When you are finished entering your ratings and comments for <u>all</u> of the core responsibilities, click on **Continue to Next Page** to move to the Special Assignments Section.



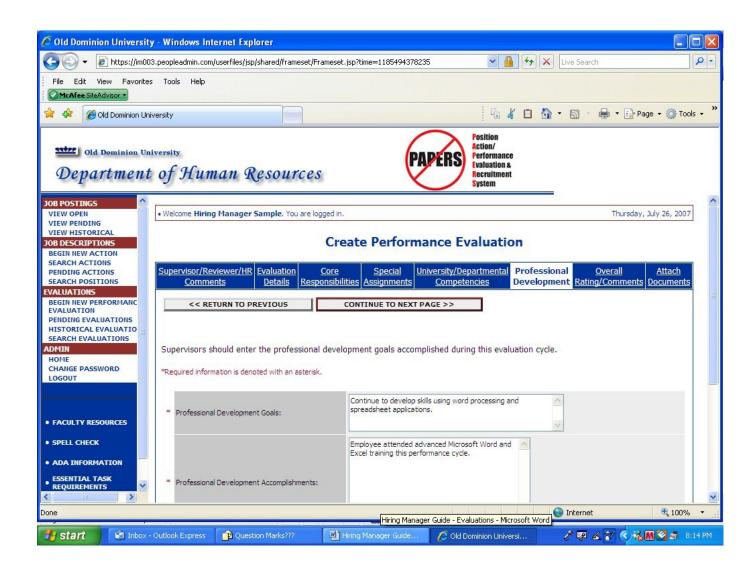
The Special Assignments in the employee's current position description will have defaulted into the evaluation. A rating and comments are REQUIRED for each special assignment. To enter a rating and comments, Click the Edit link under that special assignment.

When you are finished entering your ratings and comments for <u>all</u> of the special assignments, click on **Continue to Next Page** to move to the University/Departmental Competencies Section.

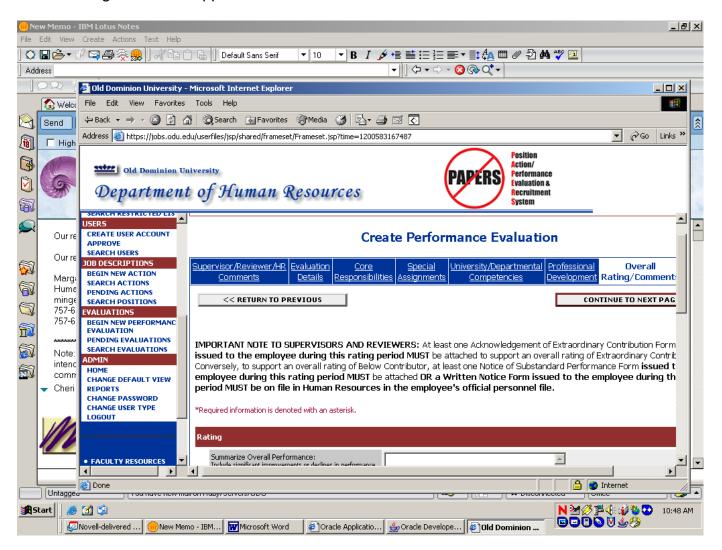


The University/Departmental Competencies in the employee's current position description will have defaulted into the evaluation. A rating and comments are REQUIRED for each university/departmental competency. To enter a rating and comments, Click the Edit link under that competency.

When you are finished entering your ratings and comments for <u>all</u> of the university/departmental competencies, click on **Continue to Next Page** to move to the Professional Development Section.



The Professional Development Goals in the employee's current position description will have defaulted into the evaluation. A description of the accomplishments of these goals is REQUIRED. After entering this description, Click on Continue to Next Page to move to the Overall Rating/Comments Section.



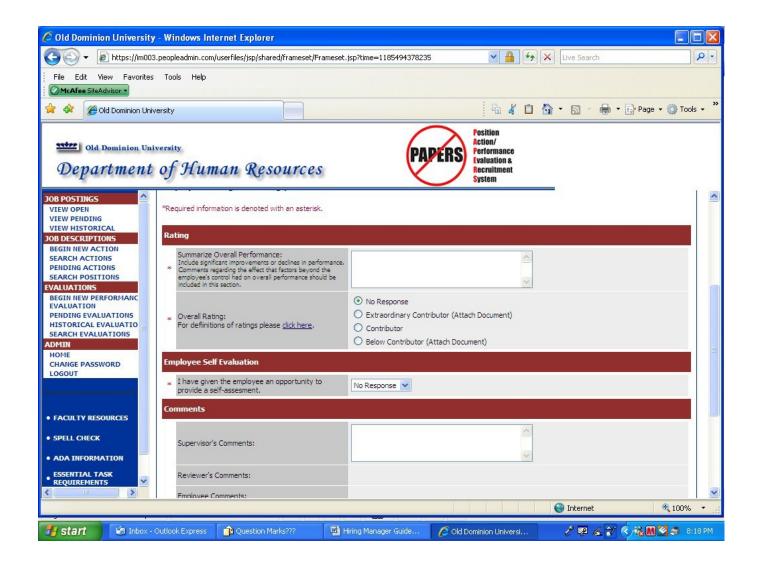
A Summary Statement regarding the employee's performance and an overall rating are REQUIRED. To assist you in determining the appropriate rating, definitions of ratings are available by clicking on the "click here" link. (If a Written Notice is on file in Human Resources (see next paragraph) and you are assigning an overall rating of Below Contributor, please enter information about this Written Notice in this field.)

IMPORTANT NOTE: At least one Acknowledgement of Extraordinary Contribution Form which was issued to the employee during this rating period MUST be attached to support an overall rating of Extraordinary Contributor. Conversely, to support an overall rating of Below Contributor, at least one Notice of Substandard Performance Form issued to the employee during this rating period MUST be attached OR a Written Notice Form issued to the employee during this rating period MUST be on file in Human Resources in the employee's official personnel file.

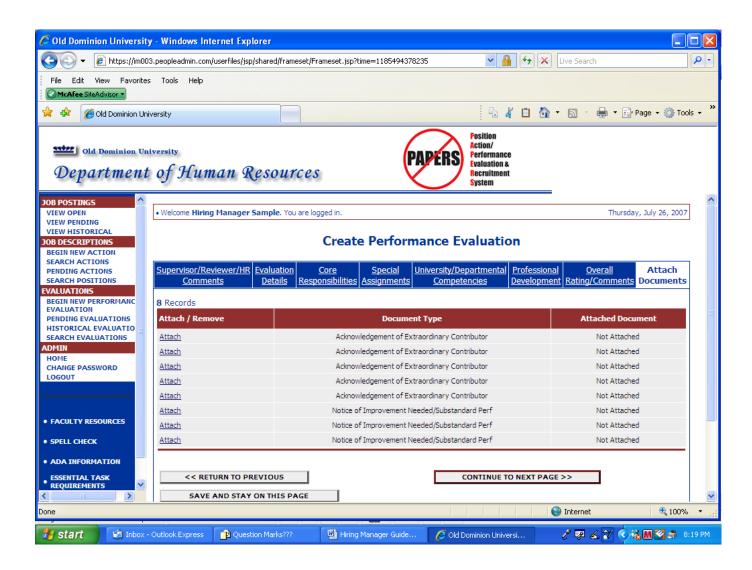
You will attach the appropriate forms in the next Section of the Evaluation.

In addition, acknowledgement of whether or not you gave the employee the opportunity to provide you with a self-evaluation is also REQUIRED.

Please also note that all comments entered at the bottom of this screen will be viewable by the Reviewer, Employee, and Human Resources. (see below)



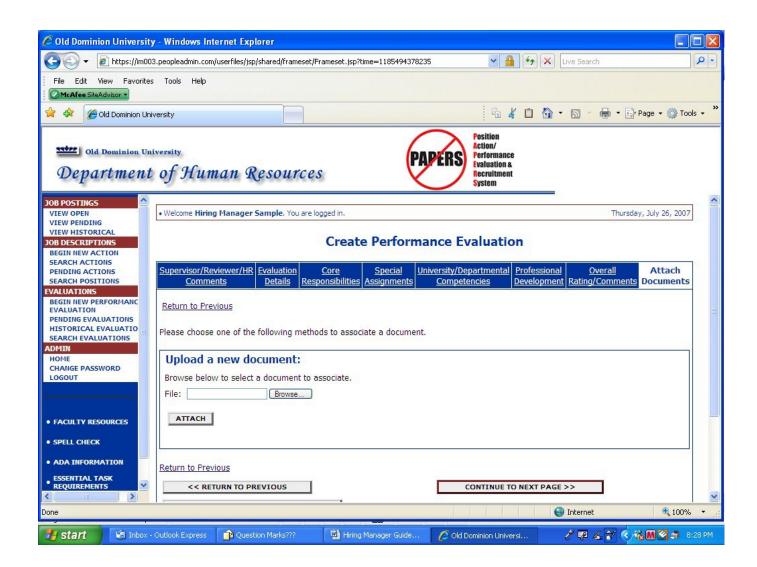
Click on Continue to Next Page to move to the Attach Documents Section.



As noted on page 16, at least one Acknowledgement of Extraordinary Contribution Form which was issued to the employee during this rating period MUST be attached to support an overall rating of Extraordinary Contributor. Conversely, to support an overall rating of Below Contributor, at least one Notice of Substandard Performance Form issued to the employee during this rating period MUST be attached OR a Written Notice Form issued to the employee during this rating period MUST be on file in Human Resources in the employee's official personnel file.

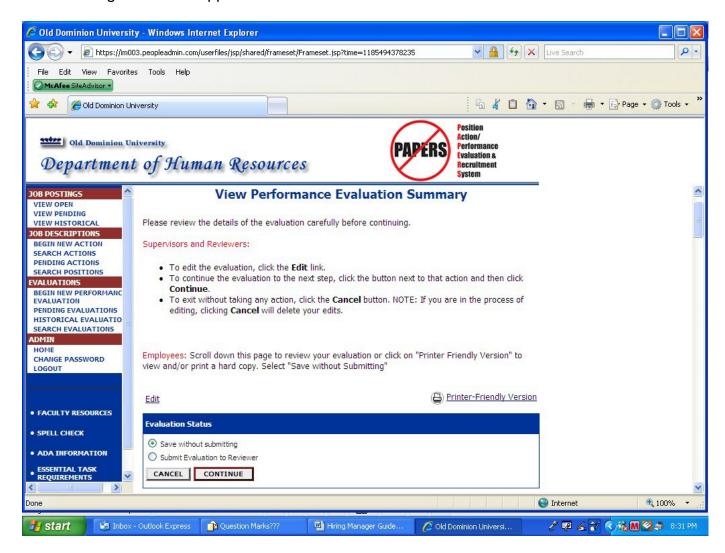
To attach a form, click on <u>Attach</u> next the appropriate form. If more than one form was issued to the employee, please attach each one.

Clicking on **Attach** will bring up the following screen:



Once you have selected the document type you want to upload, click on Browse to search for the file. Highlight the file and then click on **Attach.**

When you have finished attaching all appropriate documents, click on **Continue to Next Page** to move forward.



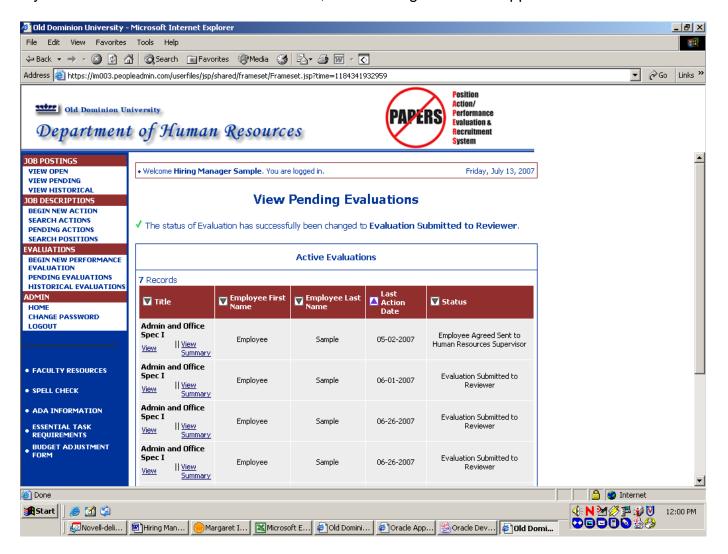
As with the former "paper" process, the evaluation will be submitted to your supervisor, referred to as the Reviewer for this purpose, for his/her review and approval. If you are ready to move this action to the Reviewer, click on **Submit Evaluation to Reviewer**. Then click on **Continue** and then **Confirm**.

An e-mail will be sent to the Reviewer notifying him/her that an evaluation is waiting for him/her to approve.

If you want to save the action and come back to it later, click on "Save Action Without Submitting" and go to Page 22 of these instructions.

Please note: If you click on Cancel at this point, you will lose any information you have entered.

If you submitted the action to the Reviewer, the following screen will appear:



Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted to the Reviewer.

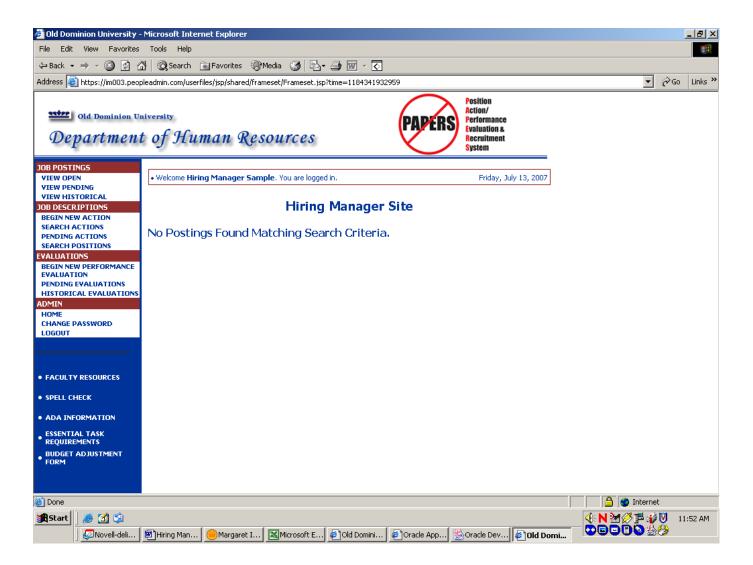
If this is the last (or only) evaluation which you need to complete and forward to the Reviewer, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

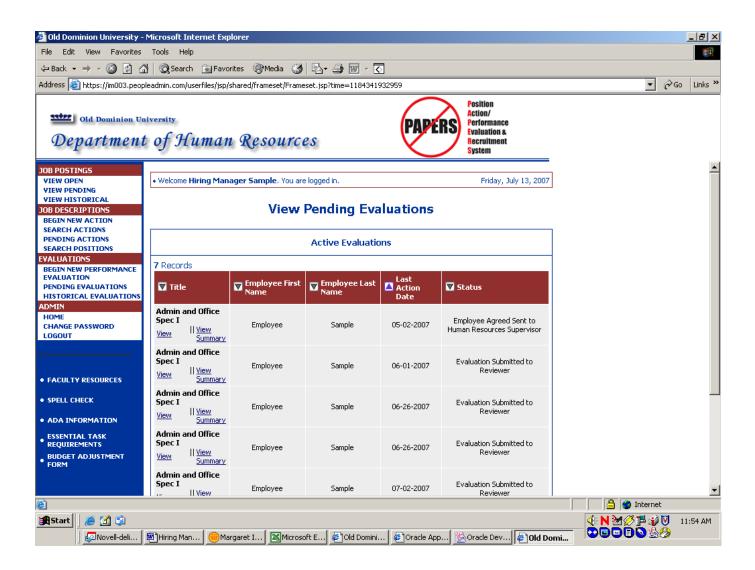
If you need to complete more evaluations, click on the **Begin New Performance Evaluation** link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 7 of these instructions and follow the process again.

Go to page 26 for instructions on how you continue the process after the Reviewer returns the evaluation to you.

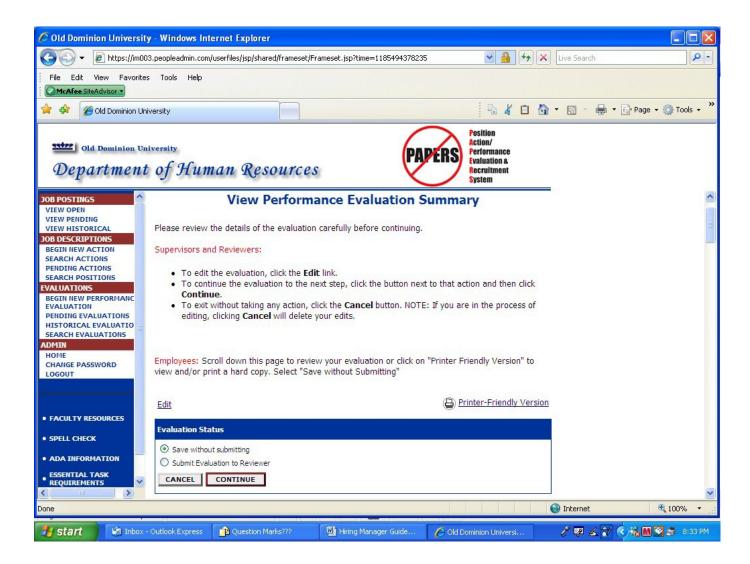
Returning to a "Saved Without Submitting" Action:

If you saved the evaluation without submitting it and are now ready to complete the evaluation, you will need to click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen. (**Disregard the "No Postings Found..."Message.**)



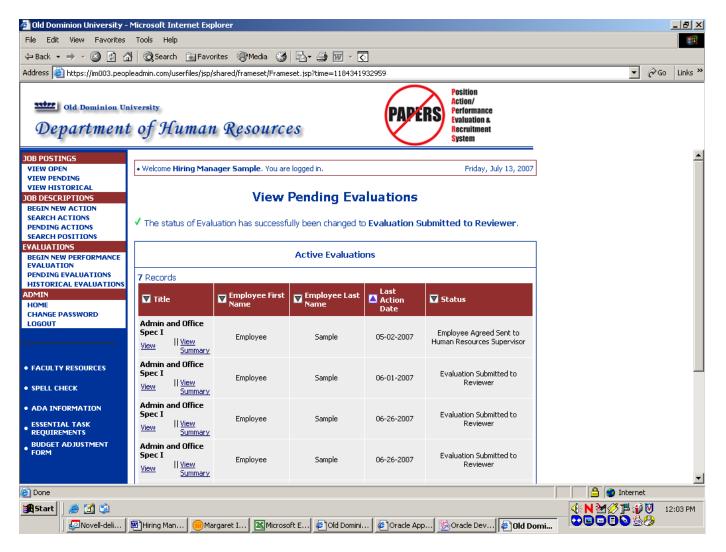


Click on **View** under the Position Title of the appropriate position at the status of **Saved Not Submitted.**



You may make edits by clicking on the <u>Edit</u> link above the blue bar. This will take you through the entire evaluation. When you return to the screen displayed above, if you are now ready to submit the evaluation to the Reviewer, click on **Submit Evaluation to Reviewer** and Click on **Continue** and then **Confirm**.

An e-mail will be sent to the Reviewer notifying him/her that an evaluation is waiting for him/her to approve.



Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted to the Reviewer.

If this is the last (or only) evaluation which you need to complete and forward to the Reviewer, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

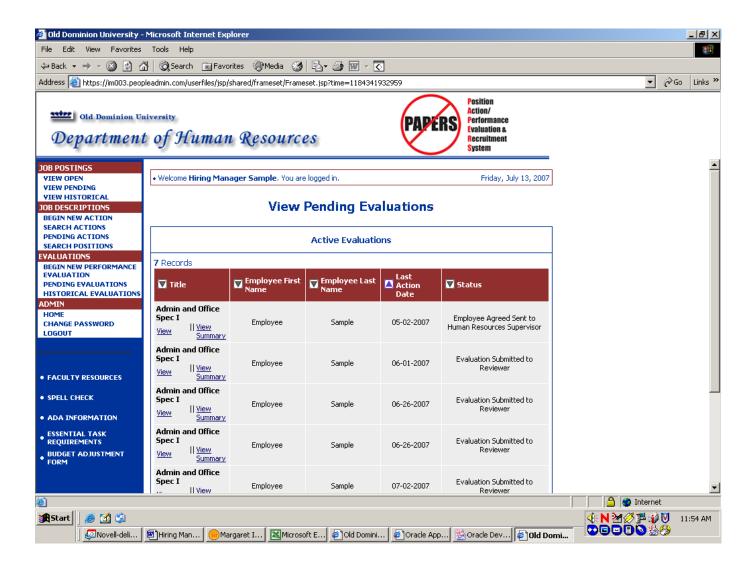
If you need to complete more evaluations, click on the **Begin New Performance Evaluation** link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 7 of these instructions and follow the process again.

Go to page 26 for instructions on how you continue the process after the Reviewer returns the evaluation to you.

Receiving an Evaluation Back from the Reviewer:

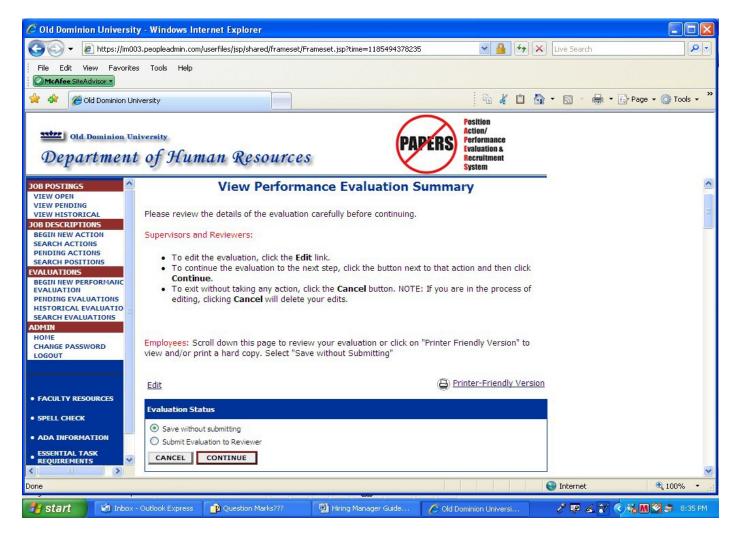
The Reviewer has the options of returning the evaluation to you with the request that revisions be made, making revisions himself/herself, or approving the evaluation as he/she received it. Once the Reviewer has selected one of these options, the evaluation will be returned to you. You will receive an e-mail notifying you that a pending evaluation is waiting for you. Click on the link in the e-mail and after you login, click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen.

The following screen will appear:



Click on "View" under the position title of the position with the status of "Returned to Supervisor for Revision" or "Evaluation Approved – Sent to Supervisor."

If the Reviewer returned the evaluation to you for revisions, the following screen will appear:



You may make revisions by clicking on the **Edit** link above the blue bar. This will take you through the entire evaluation. When you return to the screen displayed above, if you are now ready to submit the revised evaluation to the Reviewer, click on **Submit Evaluation to Reviewer** and Click on **Continue** and then **Confirm**.

An e-mail will be sent to the Reviewer notifying him/her that an evaluation is waiting for him/her to approve.

If this is the last (or only) evaluation which you need to complete and forward to the Reviewer, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

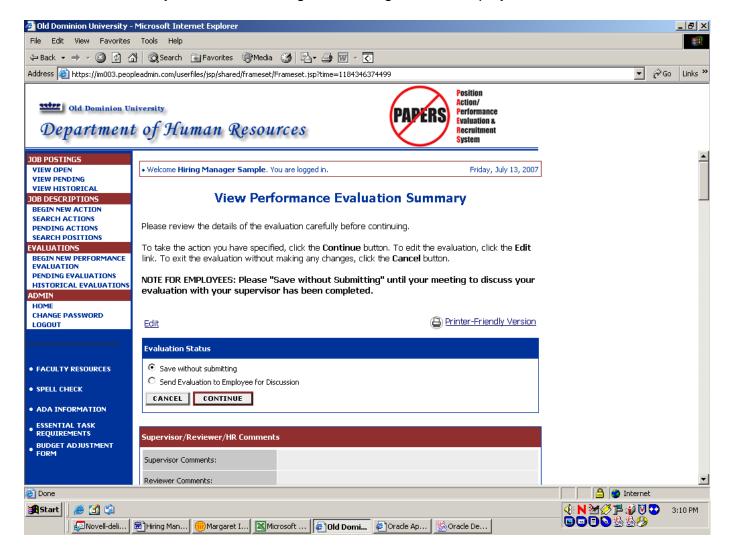
If you need to complete more evaluations, click on the **Begin New Performance Evaluation** link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 7 of these instructions and follow the process again.

If the Reviewer approved the evaluation, the following screen will appear.

You cannot make any changes to the evaluation at this point and the next steps are to:

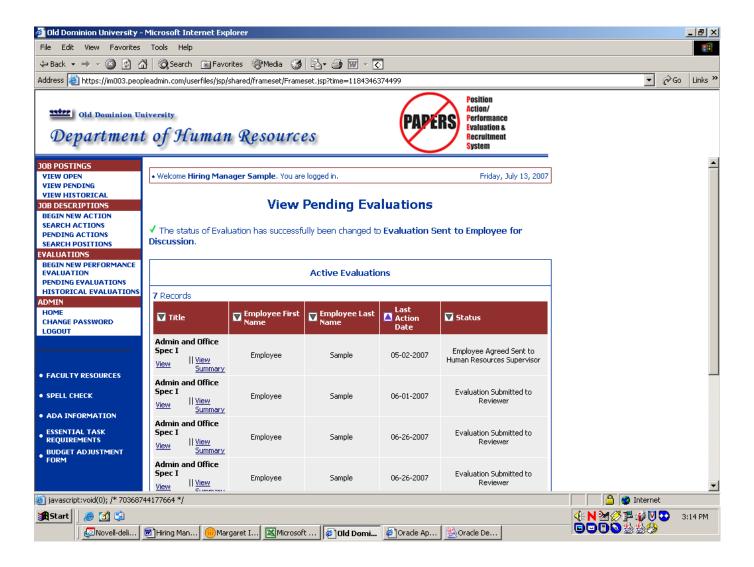
- a. schedule a meeting with the employee to discuss the evaluation
- b. forward the evaluation to the employee

You may also want to click on **Printer Friendly Version** and print a copy of the evaluation to which you can refer during the meeting with the employee.



To forward the evaluation to the employee, click on "Send Evaluation to Employee for Discussion" and click on Continue. Then click on Confirm.

If the employee has an e-mail address, he/she will receive an e-mail indicating that an evaluation is pending for his/her review and discussion with you.



Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted to the Employee.

At this point, you should have a meeting with the employee to discuss the evaluation in detail.

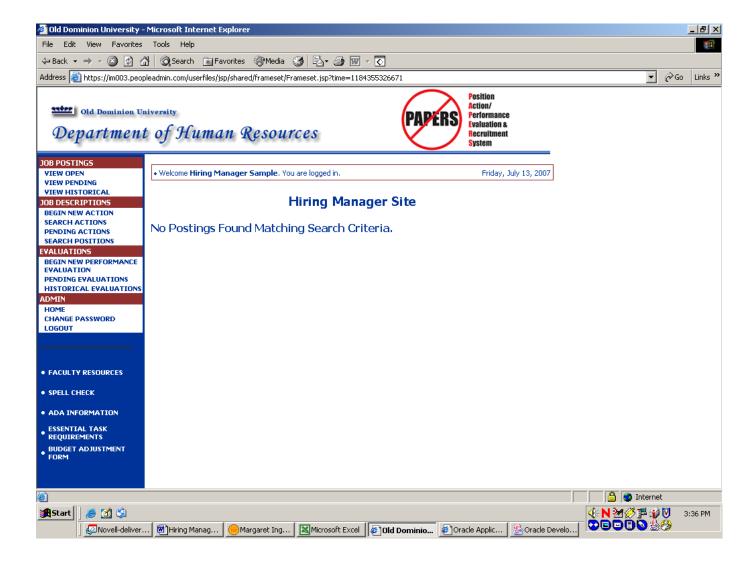
If this is the last (or only) evaluation which you need to forward to an Employee, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

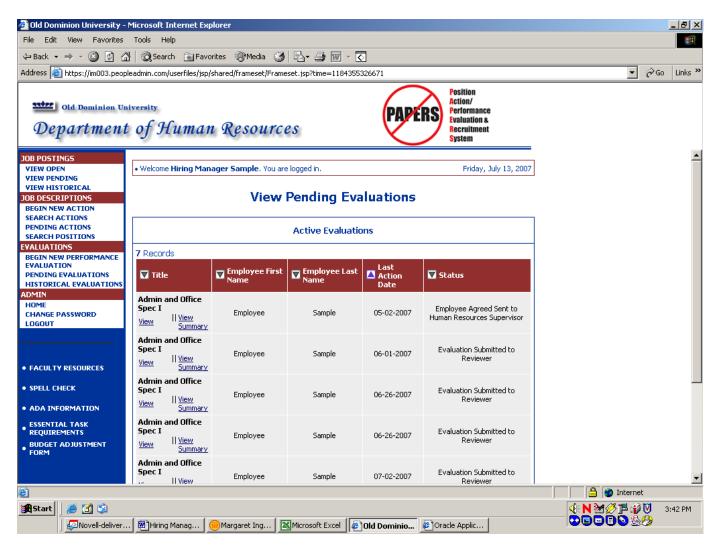
If you need to forward more evaluations to Employees, click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 26 of these instructions and follow the process again.

Receiving an Evaluation Back from an Employee:

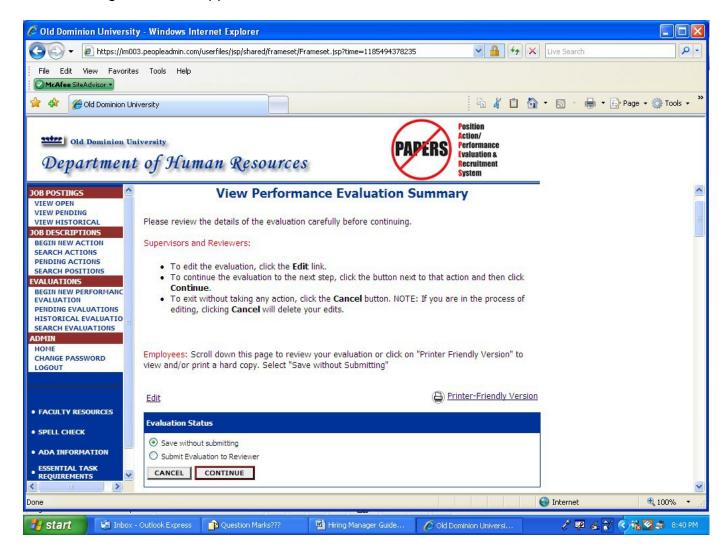
Please note: If, during the meeting with the employee, the two of you agree to make some revisions to the evaluation, the employee will have to return the evaluation to you so that you are able to make the revisions. If the employee does not request any revisions, the employee must still return the evaluation to you so that you can forward it to Human Resources.

When the employee returns the evaluation to you, you will receive an e-mail indicating that you have an evaluation waiting for you. Click on the link in the e-mail and after logging in, **Disregard** the "**No Postings Found.... Message**" and click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen.



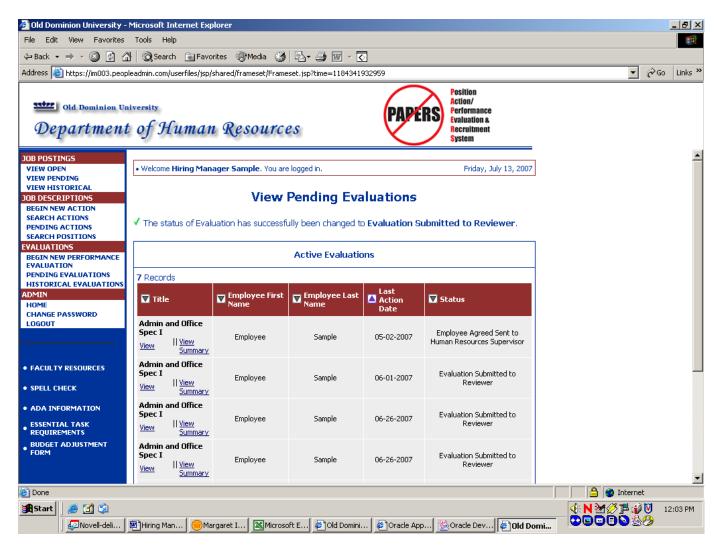


If the employee returned the evaluation to you for revisions, click on **View** under the position title of the evaluation with the status of "**Employee Returned to Supervisor for Revisions.**"



To make the revisions that you and the employee agreed upon, click the <u>Edit</u> link. You will be able to make revisions on any tab. Once your return to the screen above, click on **Submit Evaluation to Reviewer.** Then click on **Continue** and **Confirm.** (All revisions MUST be routed through the entire process again.)

The Reviewer will receive an e-mail notifying him/her that a pending evaluation is waiting for his/her review. You should have a conversation with the Reviewer separate from this on-line process explaining why the evaluation is being routed to him/her again.



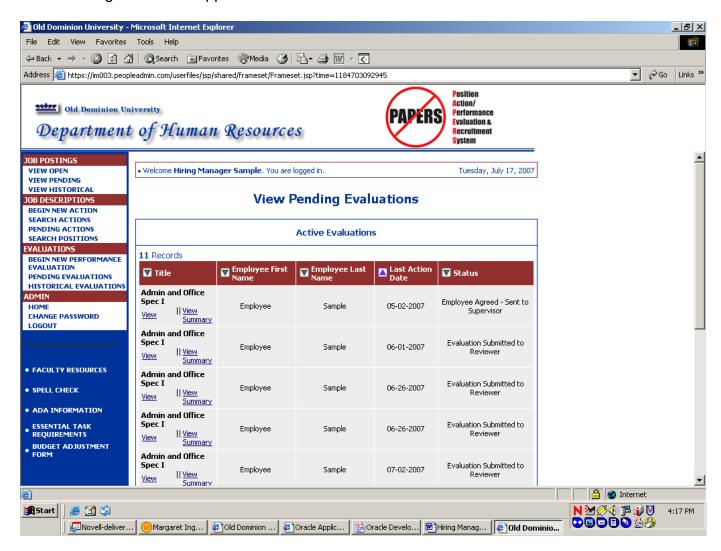
Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted to the Reviewer and the entire process will occur again.

If this is the last (or only) evaluation which you need to forward to the Reviewer, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

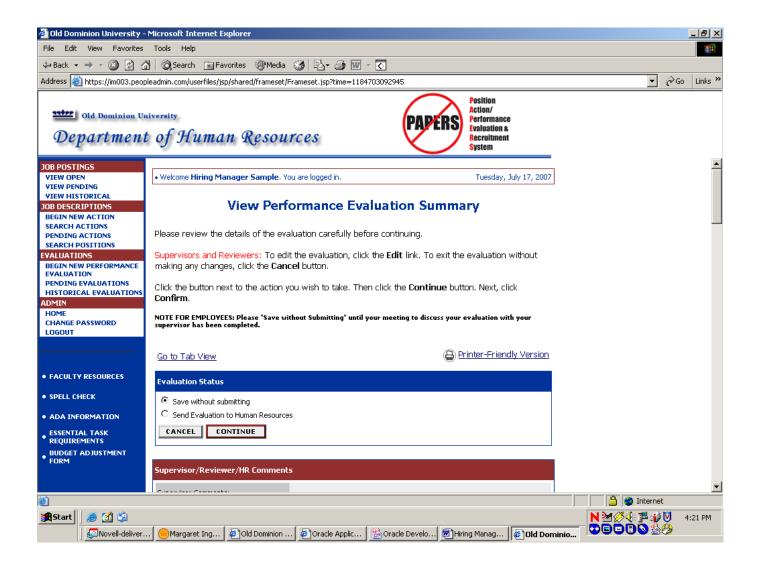
If you need to forward more evaluations to the Reviewer, click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 30 of these instructions and follow the process again.

After you and the employee meet to discuss the evaluation and the employee has not requested any revisions, the evaluation will be returned to you by the employee to send to Human Resources. When the employee returns the evaluation to you, you will receive an e-mail indicating that you have a pending evaluation waiting for you. Click on the link in the e-mail and after logging in, **Disregard** the "**No Postings Found.... Message**" and click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen.

The following screen will appear:

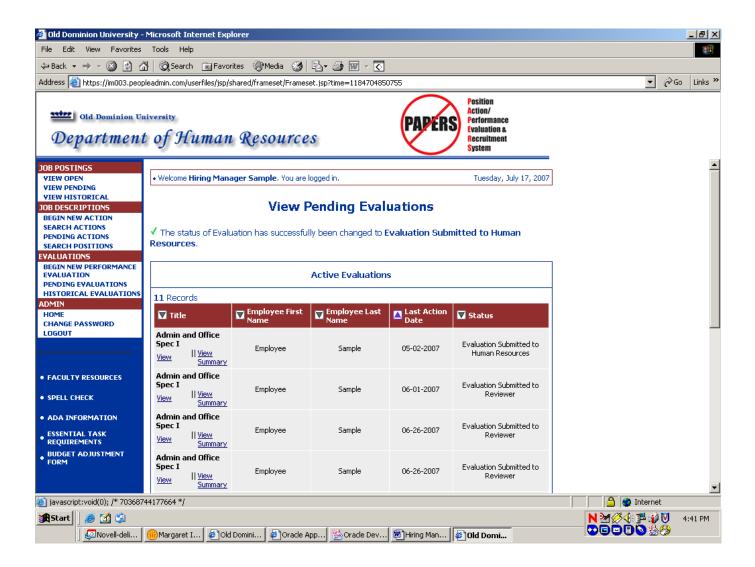


Click on **View** under the position title of the evaluation with the status of "**Employee Agreed – Sent to Supervisor.**"



You will not be able to edit any information in the evaluation at this time. If the employee has future concerns about any ratings or comments, he/she may initiate an appeal separate from this on-line process. Any changes made as a result of an appeal are subject to approval by the Reviewer.

Click on "Send Evaluation to Human Resources", then click on Continue and Confirm.



Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted to Human Resources.

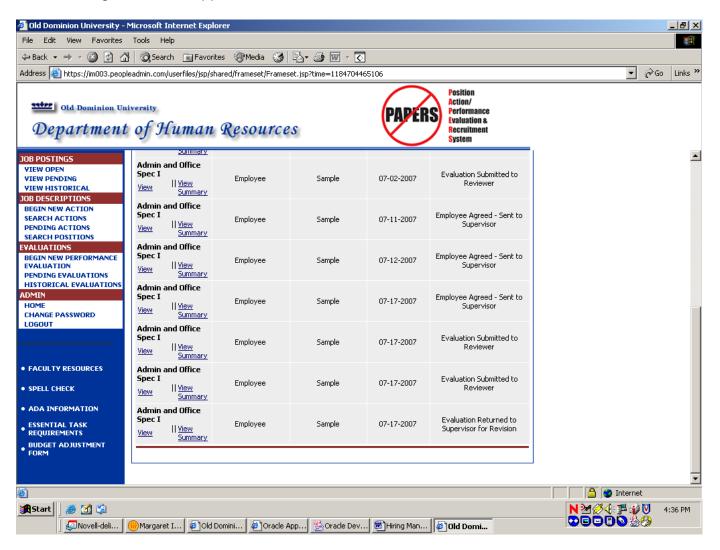
If this is the last (or only) evaluation which you need to forward to Human Resources, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

If you need to forward more evaluations to Human Resources, click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 26 of these instructions and follow the process again.

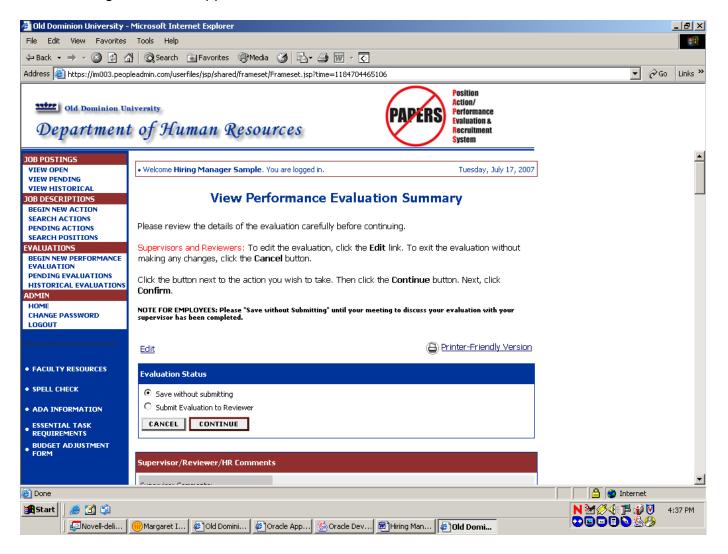
Receiving an Evaluation Back from Human Resources:

Human Resources will have the option of returning the evaluation to you for revisions which are necessary for State policy compliance. You will receive an e-mail indicating that you have an evaluation waiting for you. Click on the link in the e-mail and after logging in, **Disregard** the "**No Postings Found.... Message**" and click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen.

The following screen will appear:



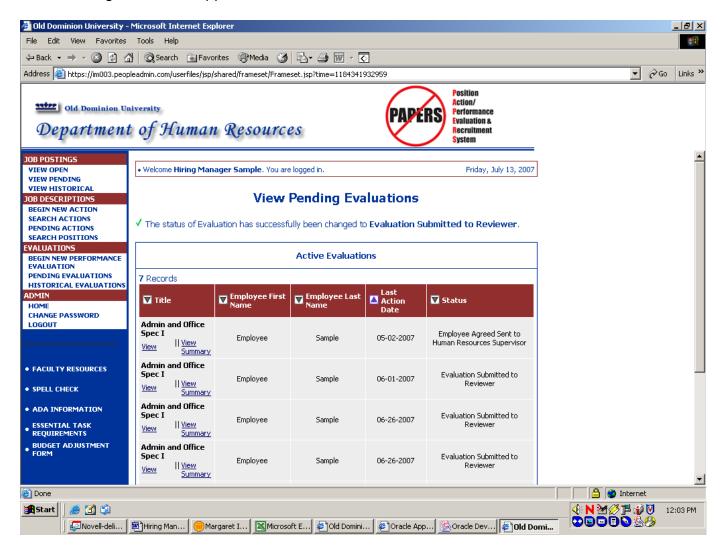
Click on "View" under the role title of the position with the status of "Evaluation Returned to Supervisor for Revision."



There will be comments from Human Resources on this screen, indicating the revisions that need to be made. Click the <u>Edit</u> link to enter the evaluation. You will be able to make revisions on any tab. Once you return to the screen above, click on **Submit Evaluation to Reviewer.** Then click on **Continue** and **Confirm.** (All revisions MUST be routed through the entire process again, per State policy.)

The Reviewer will receive an e-mail notifying him/her that a pending evaluation is waiting for his/her review. You should have a conversation with the Reviewer separate from this on-line process explaining why the evaluation is being routed to him/her again.

You should also have a conversation with the Employee, informing him/her that the evaluation has been revised per Human Resources' request, and that the evaluation will be forwarded to him/her after approval by the Reviewer.

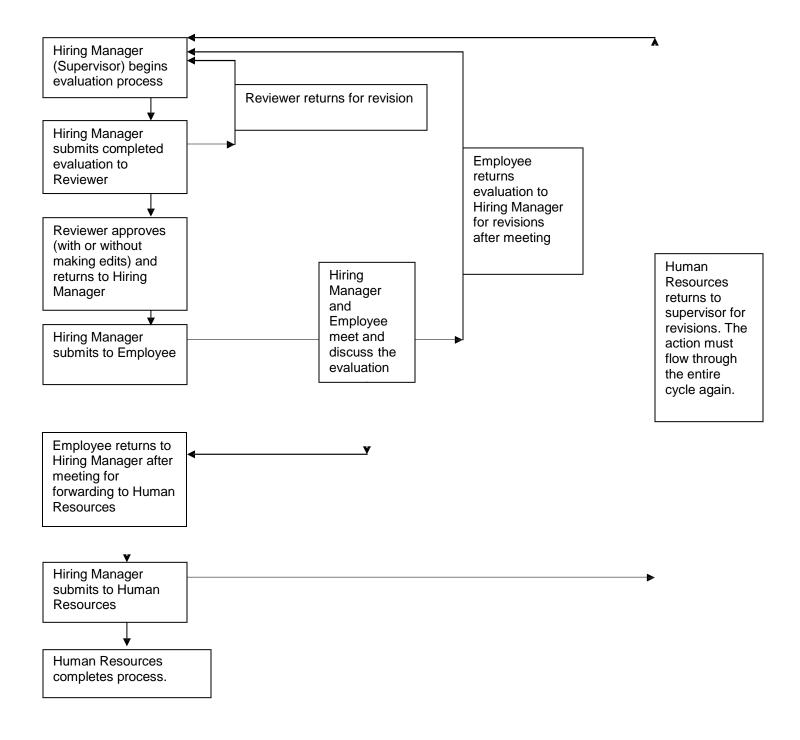


Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted to the Reviewer and the entire process will occur again.

If this is the last (or only) evaluation which you need to forward to the Reviewer, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

If you need to forward more evaluations to the Reviewer, click on the **Pending Evaluations** link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 37 of these instructions and follow the process again.

CLASSIFIED EVALUATION WORKFLOW





Old Dominion University Evaluation of Classified Staff

REVIEWER'S GUIDE _______



INTRODUCTION

Welcome to the Old Dominion University Position Classified Evaluation System. The Human Resources Department has implemented this system in order to automate the evaluation process.

You will use this system to:

• Review and Approve evaluations for non-probationary classified staff each fall

The system is designed to benefit you by facilitating:

Up-to-date access to information regarding all positions in your area.

The Human Resources Department is providing these training materials to assist with your understanding and use of this system.

Your Web Browser

PAPERS is designed to run in a web browser over the Internet. The system is compatible with Internet Explorer 6.0 and higher and Firefox Mozilla 2.0 and higher. The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

Please <u>do not</u> use your browser's "Back", "Forward" or "Refresh" buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.

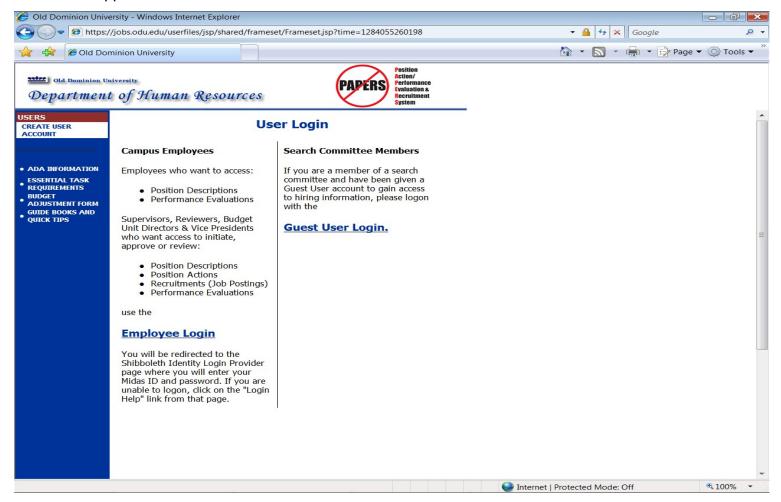
Security of Information

To ensure the security of the information in the system, it **will automatically log you out after 60 minutes if it detects no activity.** However, anytime you leave your computer, we strongly recommend that you save any work in progress and Logout of the system by clicking on the logout link located on the bottom left side of your screen.

GETTING STARTED

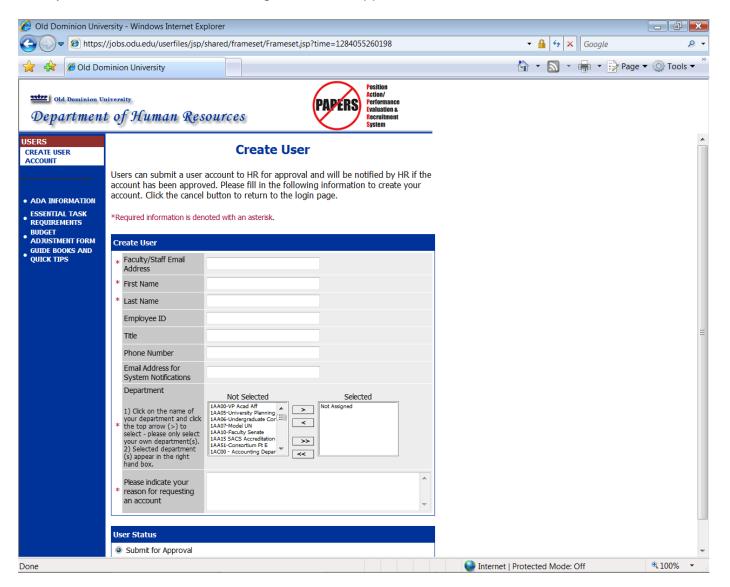
https://olddominion.peopleadmin.com/hr

You will receive an e-mail message from one of the staff you supervise telling you that you have an evaluation waiting. Click on the link in the e-mail and the following screen will appear:



If you have NOT used the system before, go to page 5. If you have used the system before as a Hiring Manager for a recruitment or as a Reviewer for a Certify a Position Description (PD) Action, or as a Budget Unit Director for a Redefine an Existing Position Description or Create a New Classified Position action, enter your username and password and click on Login. To approve an evaluation, you must be logged in with the User Type of Reviewer. If the user type of Hiring Manager or Budget Unit Director (or also Employee – if you are a classified employee) appears at the top of the screen, an option of Change User Type will be listed in the navigation bar on the left of the screen. Click on this link and change your user type to Reviewer. Also click on Change Default View and confirm that Department View is selected. (Go to page 6 of these instructions.)

If you are entering the site **for the first time**, you must create your own account by clicking on the **Create User Account** link in the navigation bar on the left of the screen. After you click this link, the following screen will appear:



Enter your faculty/staff email address, along with the other requested information. Include comments as to why you are requesting an account.

After completing this form, click **Continue**, and you will be asked to review your information. After you have reviewed it, click **Submit**. Your request will then be sent to the Human Resources Department, which will approve your account.

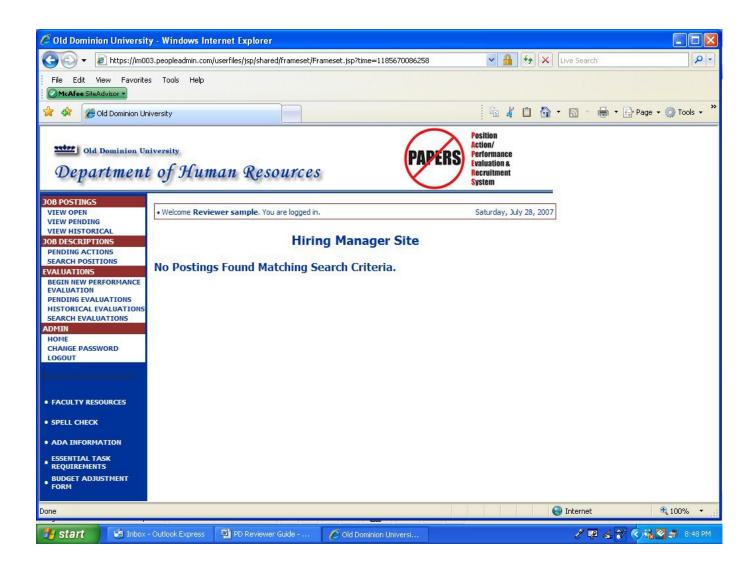
Once Human Resources notifies you that your request has been approved, you will then be able to login to the system with your user name and password. (This approval could take up to 24 hours.)

WELCOME SCREEN

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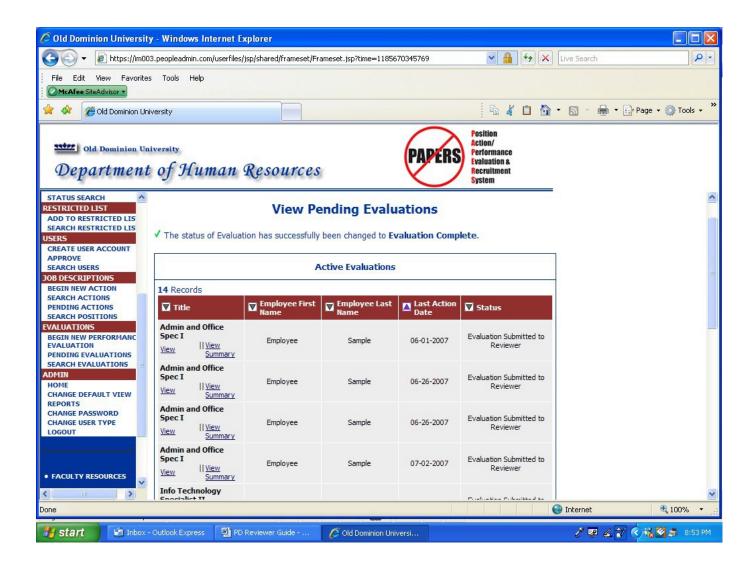
Upon logging in, the following screen will welcome you to the Position Action/Performance Evaluation and Recruitment System. (PAPERS)

PAPERS includes our on-line application system. If there are pending recruitments for which you are the hiring manager, they will appear on this screen. If there are not any pending recruitments, the following message will appear. (This is a system message that we cannot block from appearing.) PLEASE DISREGARD THIS MESSAGE AND MOVE ON TO THE INSTRUCTIONS ON THE NEXT PAGE.



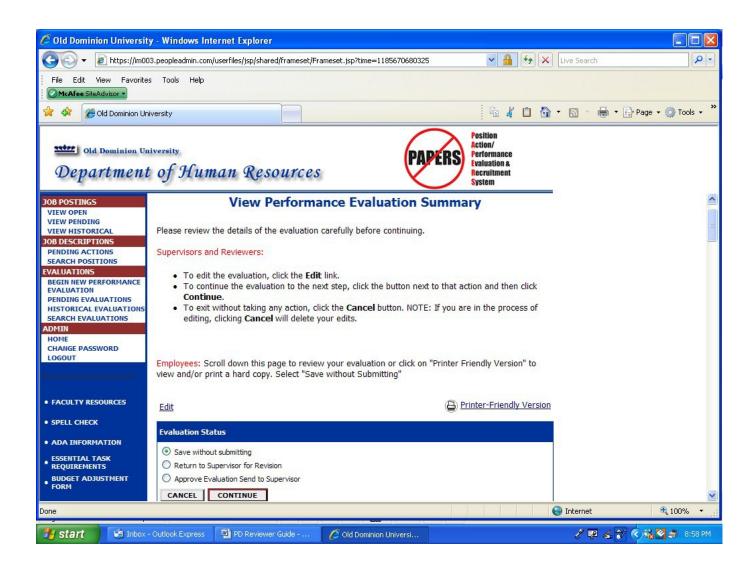
CLASSIFIED EVALUATION PROCESS

To review and approve an evaluation, click on the "**Pending Evaluations**" link in the **Evaluations** section of the navigation bar on the left of the screen. The following screen will appear:



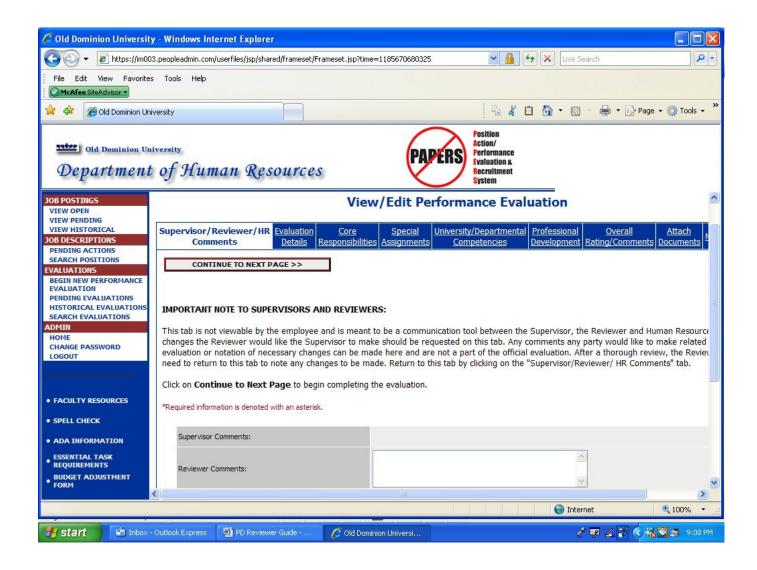
Click on "View" under the **Position Title** of the appropriate position at the status of **Evaluation Submitted to Reviewer.**

The evaluation will be displayed on the following screen:



You may scroll through a summary of the evaluation using the arrow on the lower right side of the screen. However, it is **highly recommended** that you review the evaluation section-by-section by clicking on the **Edit** link above the blue bar. This will take you through the entire evaluation and will enable you to make edits in any section. **Any edits that you make should be discussed with the supervisor.**

The first section that will appear is the **Supervisor/Reviewer/HR Comments** Tab:



This first tab is not viewable by the employee and is meant to be a communication tool between the supervisor and reviewer. There may be comments present from the supervisor to you. You may enter comments here regarding any edits you would like the supervisor to make or describing any edits you have made yourself. You will be able to return to this tab after reviewing the entire evaluation and add any comments at that time. You would return by simply clicking on the Tab.

You can also make edits yourself to any ratings or comments that were entered by the supervisor in any section of the evaluation. You will also have the opportunity to enter comments on the Overall Rating/Comments Tab at the end of the evaluation. The comments on that Tab WILL be viewable by the employee.

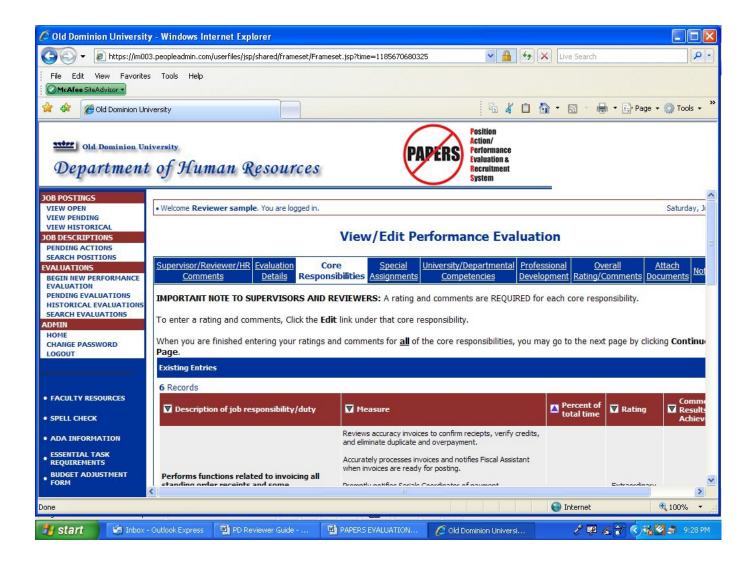
You will move through the evaluation by clicking on **Continue to Next Page**.

The next section contains the incumbent's name, role title, position number, reporting line, evaluation cycle dates, etc.:

Click on Continue to Next Page.

The next three sections are the Core Responsibilities, Special Assignments, and University/Departmental Competencies Tabs. The total of the items in these three tabs must be at least 3 and no more than 10.

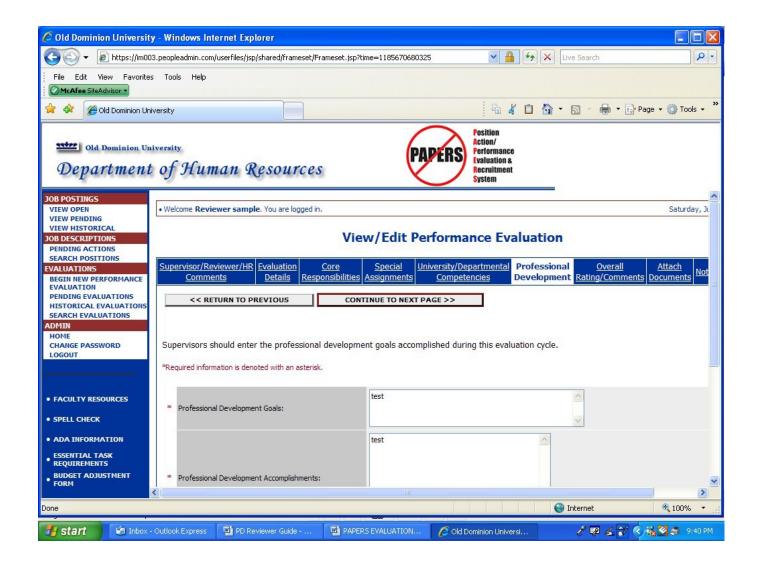
There MUST be a rating and comments for each responsibility, special assignment, and competency. You can make edits to any of the ratings and/or comments that were entered by the supervisor.



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The next section is the **Professional Development Tab**.

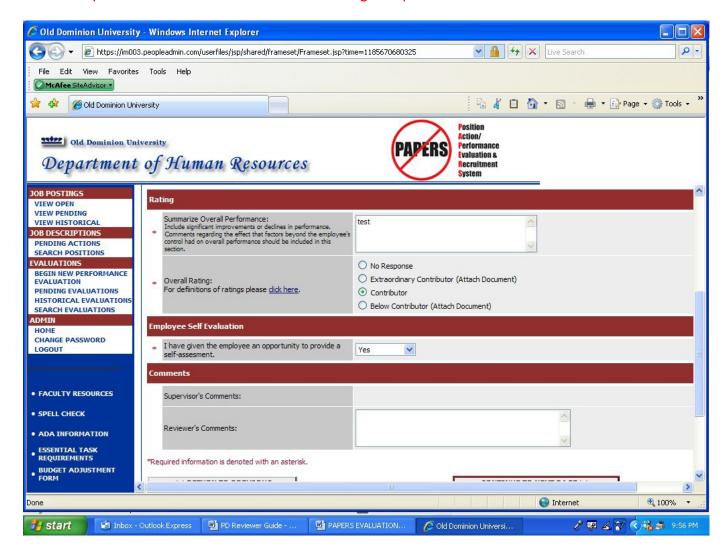
The Professional Development Goals in the employee's current position description will have defaulted into this part of the evaluation. The supervisor should have entered a description of the accomplishments of these goals.



You will be able to edit the comments regarding the accomplishments.

The next section is the **Overall Rating/Comments Tab.**

The supervisor should have entered a rating that is supported by the individual ratings in each prior section of the evaluation as well as appropriate comments summarizing the employee's overall performance. The supervisor should have also indicated that he/she gave the employee the opportunity to provide him/her with a self-evaluation. Per State Policy, all employees MUST be given the opportunity to provide a self-evaluation to their supervisor PRIOR to the evaluation being completed.

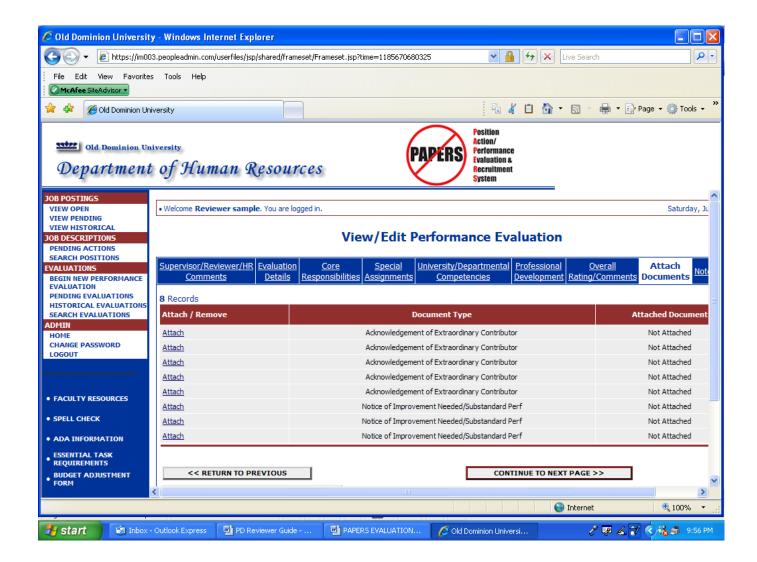


You will be able to edit the overall rating as well as the summary comments.

There is also a **Reviewer's Comments field** on this page in which you should enter comments regarding the employee's performance or your endorsement of the information provided by the supervisor in the evaluation.

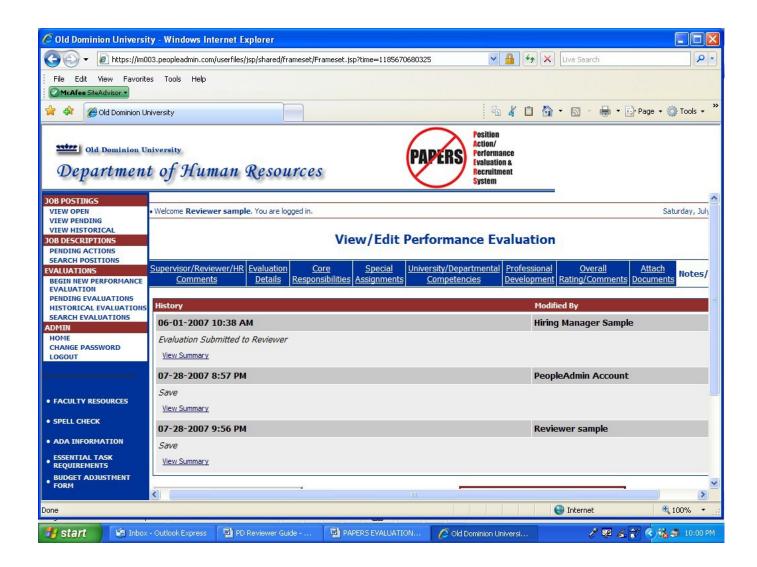
Note: All comments you enter on this page will be viewable not only by you, but by the Supervisor, the Employee, and Human Resources' staff.

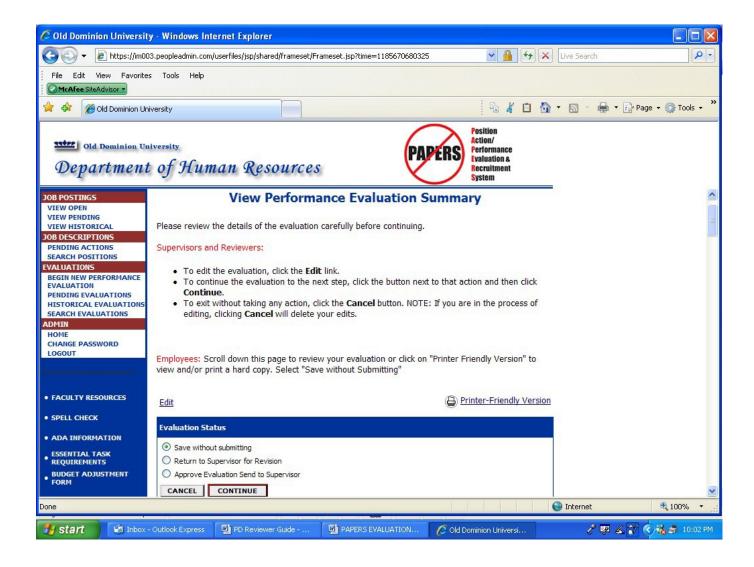
The next section is where the supervisor should have attached the appropriate forms to support a rating of **Extraordinary Contributor** or **Below Contributor**, **which is required**.



If no required supporting forms are attached, the evaluation should be returned to the Supervisor when you reach the end of the evaluation.

This Notes/History Tab shows the steps of the process so far:





You have the options to "Save Without Submitting" the action or "Return to Supervisor for Revision" or Approve Evaluation-Send to Supervisor."

If you want to return the evaluation to the supervisor for revisions, click on "Return to Supervisor for Revision" and then click on Continue and then Confirm. The supervisor will receive an e-mail notifying him/her that the evaluation has been returned for revision.

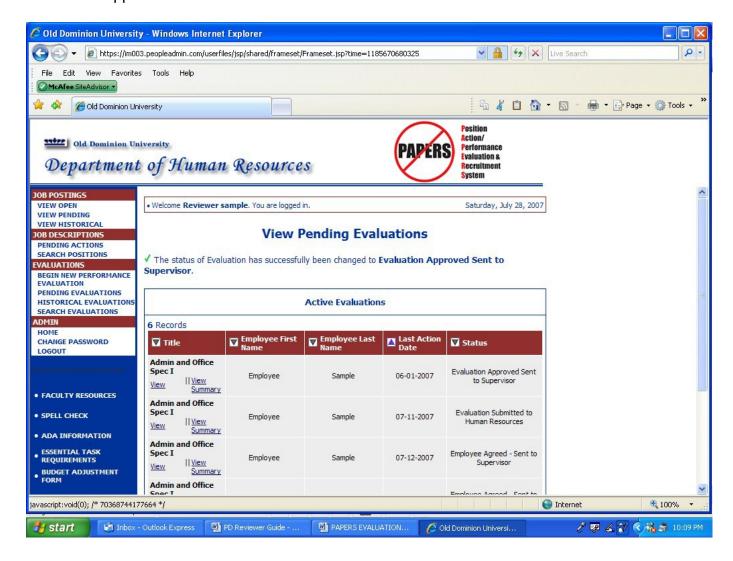
It is recommended that you have a verbal discussion with the supervisor separate from this on-line system about the revisions you are requesting in addition to any comments you have entered regarding revisions.

The supervisor will re-submit the evaluation to you after making the requested revisions and the process described on pages 7-17 will be repeated.

If you are ready to approve and submit the evaluation to the supervisor for forwarding to the employee, click on "Approve Evaluation-Send to Supervisor." Then click on Continue and then Confirm and go to page 22 of these instructions.

If you want to save the action and come back to it later, click on "Save Without Submitting." Then click on Continue and then Confirm and go to page 19 of these instructions.

If you approved the evaluation and submitted it back to the supervisor, the following screen will appear:



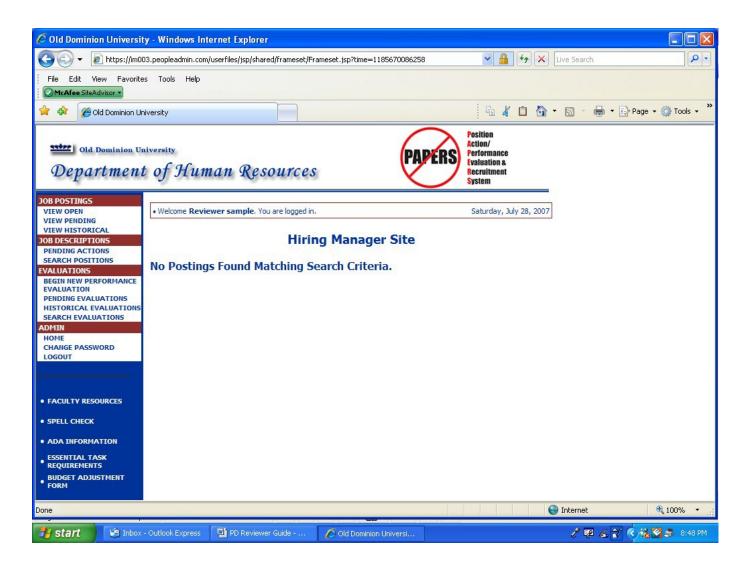
Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted back to the Supervisor. An e-mail will be sent to the Supervisor notifying him/her that an evaluation is waiting for him/her to submit to an employee.

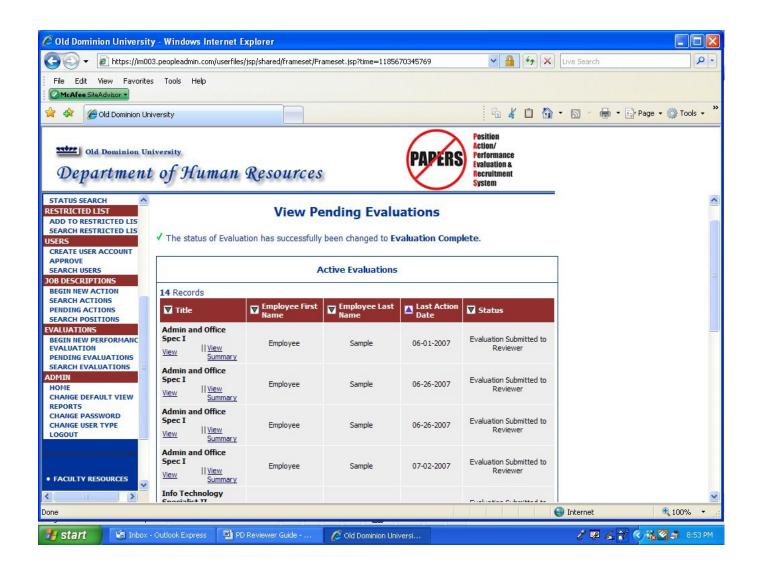
If this is the last (or only) evaluation which you need to submit back to a Supervisor, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

If you need to review and approve more evaluations, click on the "**Pending Evaluations**" link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 7 of these instructions and repeat the process.

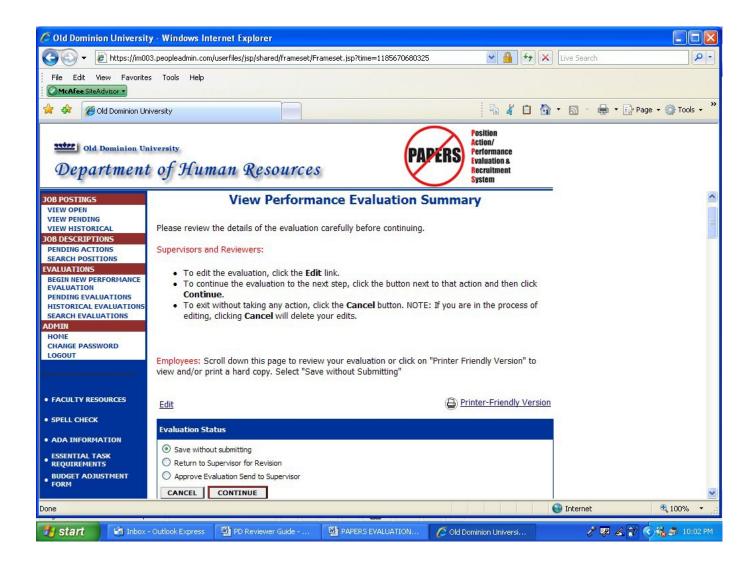
Returning to a "Saved Without Submitting" Action:

If you saved the action without submitting it and are now ready to complete the action, you will need to **Login** (see page 4), and click on the "Pending Evaluations" link in the Evaluations section of the navigation bar on the left of the screen. (Disregard the "No Postings Found..." Message.)



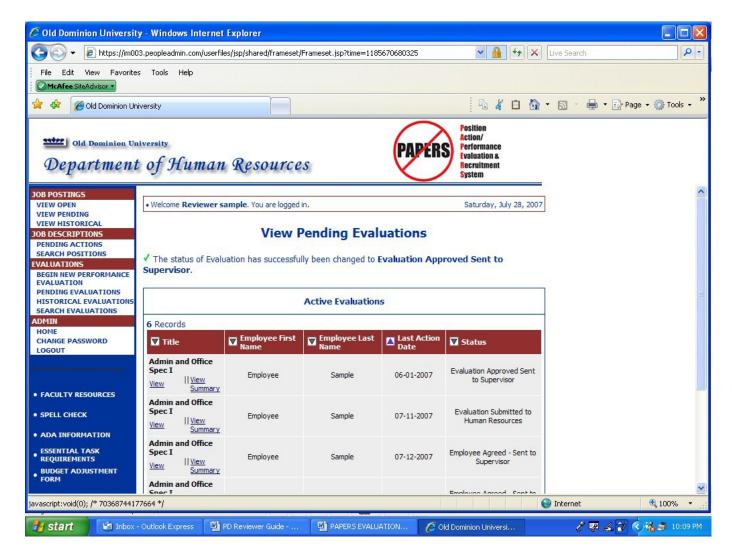


Click on **View** under the Position Title of the appropriate position at the status of "Saved But Not Submitted."



Click on the **Edit** link (above the blue bar) if you want to continue reviewing the evaluation section-by-section.

When you are ready to approve and submit the evaluation to the supervisor, click on "Approve Evaluation-Send to Supervisor." Then click on Continue and then Confirm.

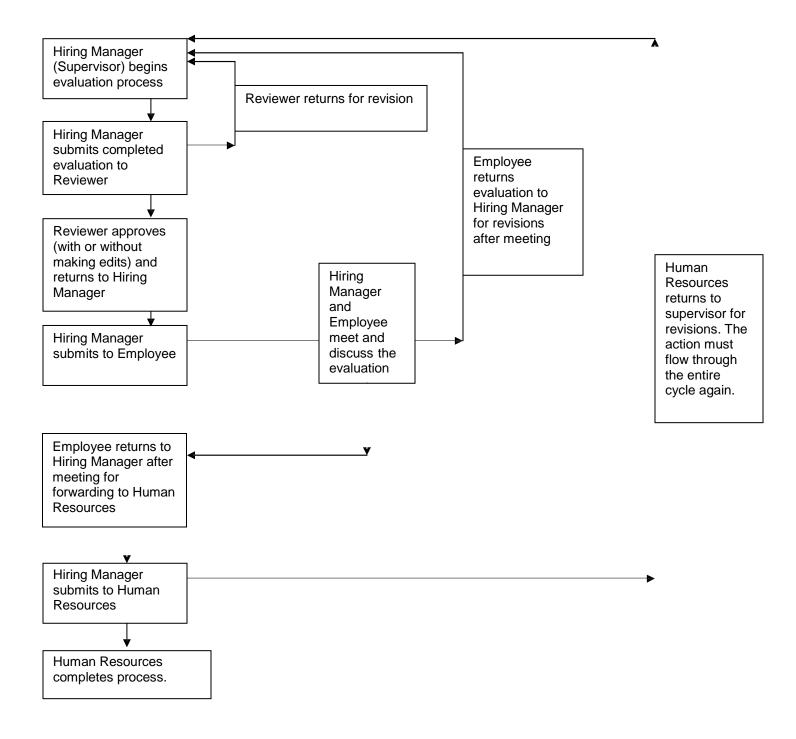


Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted to the Supervisor. An e-mail will be sent to the Supervisor notifying him/her that an evaluation is waiting for him/her to submit to an employee.

If this is the last (or only) evaluation which you need to submit to a Supervisor, you can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

If you need to submit more evaluations to a Supervisor, click on the "**Pending Evaluations**" link in the **Evaluations** section of the navigation bar on the left of the screen and go back to page 7 of these instructions and repeat the process.

CLASSIFIED EVALUATION WORKFLOW





Old Dominion University Evaluation of Classified Staff

EMPLOYEE'S GUIDE



INTRODUCTION

Welcome to the Old Dominion University Position Description System. The Human Resources Department has implemented this system in order to automate the evaluation system.

You will use this system to:

Review and approve your annual evaluation

The Human Resources Department is providing these training materials to assist with your understanding and use of this system.

Your Web Browser

PAPERS is designed to run in a web browser over the Internet. The system is compatible with Internet Explorer 6.0 and higher and Firefox Mozilla 2.0 and higher. The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

Please **do not** use your browser's "Back", "Forward" or "Refresh" buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.

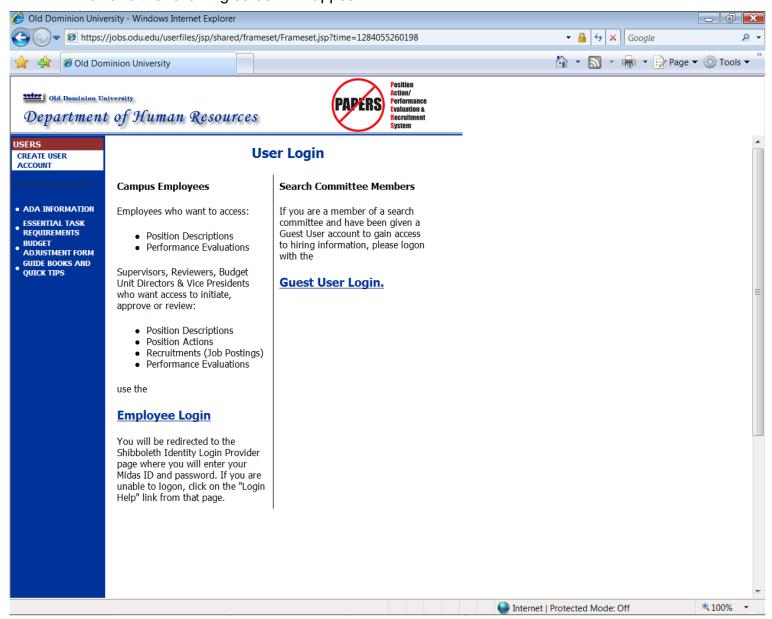
Security of Information

To ensure the security of the information in the system, it **will automatically log you out after 60 minutes if it detects no activity.** However, anytime you leave your computer, we strongly recommend that you save any work in progress and Logout of the system by clicking on the logout link located on the bottom left side of your screen.

GETTING STARTED

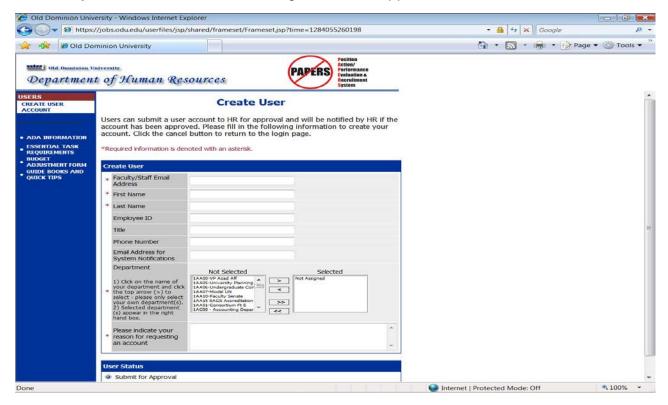
https://olddominion.peopleadmin.com/hr

If you have an e-mail account, you will receive an e-mail message from your supervisor telling you that your evaluation has been submitted to you. Please note that you should have been asked to provide a self-evaluation to your supervisor prior to him/her completing your evaluation in PAPERS. Click on the link in the e-mail and the following screen will appear:



If you have used the system before as a Hiring Manager for a recruitment or to certify position descriptions of classified staff who you supervise, or as a Reviewer to approve certifications of position descriptions of classified staff who report to supervisors under you, or as an Employee to certify your position description, enter your username and password and click on **Login**. To review and approve your evaluation, you must be logged in with the User Type of **Employee**. If the user type of Hiring Manager or Reviewer appears at the top of the screen, an option of **Change User Type** will be listed in the navigation bar on the left of the screen. Click on this link and change your user type to **Employee**. (**Go to page 6 of these instructions.**)

If you are entering the site **for the first time**, you must create your own account by clicking on the **Create User Account** link in the navigation bar on the left of the screen. After you click this link, the following screen will appear:



Enter your faculty/staff email address, along with the rest of the requested information. Include a comments as to why you are requesting an account.

After completing this form, click **Continue**, and you will be asked to review your information. After you have reviewed it, click **Submit**. Your request will then be sent to the Human Resources Department, which will approve your account.

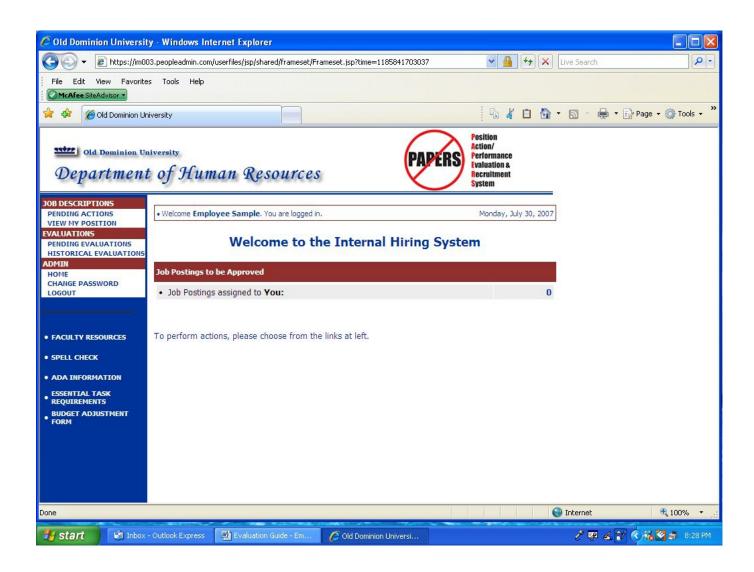
Once Human Resources notifies you that your request has been approved, you will then be able to login to the system with your user name and password. (This approval could take up to 24 hours.)

WELCOME SCREEN

.....

UPON LOGGING IN, THE FOLLOWING SCREEN WILL WELCOME YOU TO THE POSITION ACTION/PERFORMANCE EVALUATION AND RECRUITMENT SYSTEM. (PAPERS)

PAPERS includes our on-line application system. If there are pending recruitments for which you are the hiring manager, they will appear on this screen. If there are not any pending recruitments, the following message will appear. (This is a system message that we cannot block from appearing.) PLEASE DISREGARD THIS MESSAGE AND MOVE ON TO THE INSTRUCTIONS ON THE NEXT PAGE.

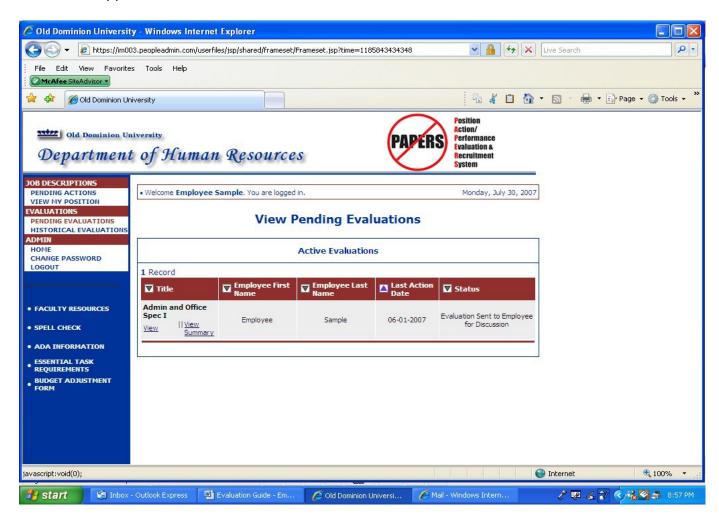


REVIEWING YOUR EVALUATION

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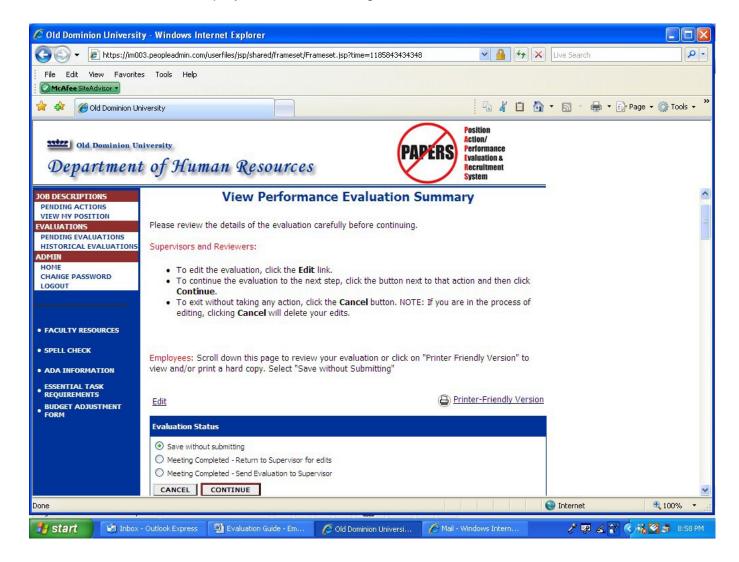
In addition to the e-mail notifying you that your evaluation has been submitted to you for review, your supervisor will be scheduling a meeting with you to discuss your evaluation. You should review your evaluation in PAPERS prior to meeting with your supervisor. You will no longer sign a paper Evaluation. Rather, you will be "electronically approving" the evaluation through PAPERS. When you receive the e-mail from your supervisor, the Evaluation has already been approved by the Reviewer. The responsibilities and assignments in the Evaluation on which you are being rated have defaulted from your current position description which was previously certified by your Supervisor, the Reviewer, and you in PAPERS.

To begin to review your evaluation, click on the "**Pending Evaluations**" link in the **Evaluations** section of the navigation bar on the left of the screen. The following screen will appear:



To continue, click on "View" under your position title in the first column.

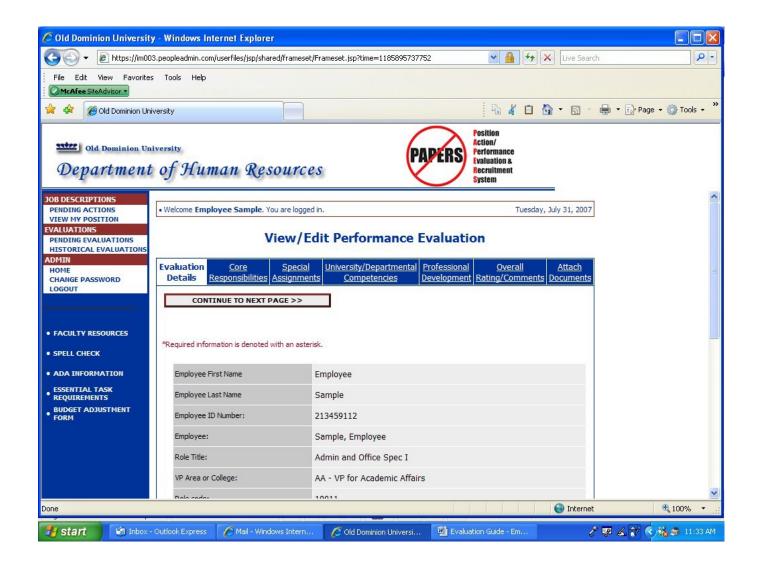
Your evaluation will be displayed on the following screen:



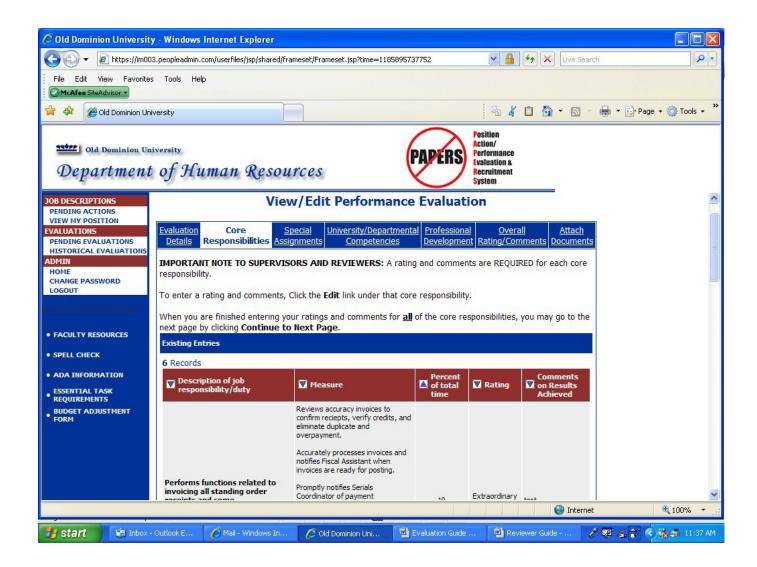
You may scroll through a summary of the evaluation using the arrow on the lower right side of the screen. However, for a thorough review and to be able to enter comments, you should click on the **Edit link** above the blue bar. This will take you through the entire evaluation, section by section, but please be aware that you **cannot actually edit any information**. However, if you have any concerns about the evaluation, you will be able to return it to your supervisor for revisions.

Click on **Continue to Next Page** to move through the sections of the position description.

The first page contains your name, role title, position number, reporting line, evaluation cycle dates, etc.:



The next three sections are the Core Responsibilities, Special Assignments, and University/Departmental Competencies Tabs.



Please read all the information carefully. Your evaluation can contain only **ten total items** when the **Core Responsibilities**, **Special Assignments**, **and University/ Departmental Competencies** are added together. Take time to total them so that you can inform your supervisor if more than ten are listed.

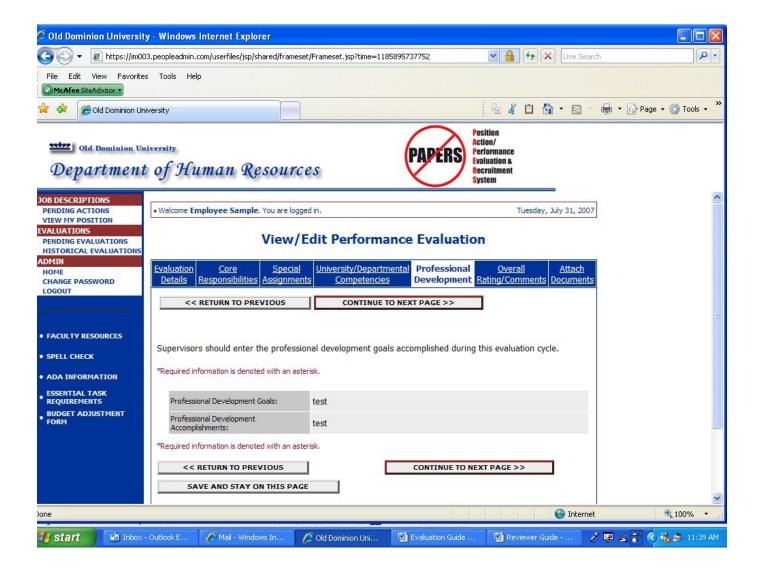
Your supervisor is **required** to provide a rating and comments for **each** Core Responsibility, Special Assignment and University/Departmental Competency. Please let him/her know if any ratings or comments are missing.

Click on **Continue to Next Page** to move through the evaluation.

The **Professional Development** page.

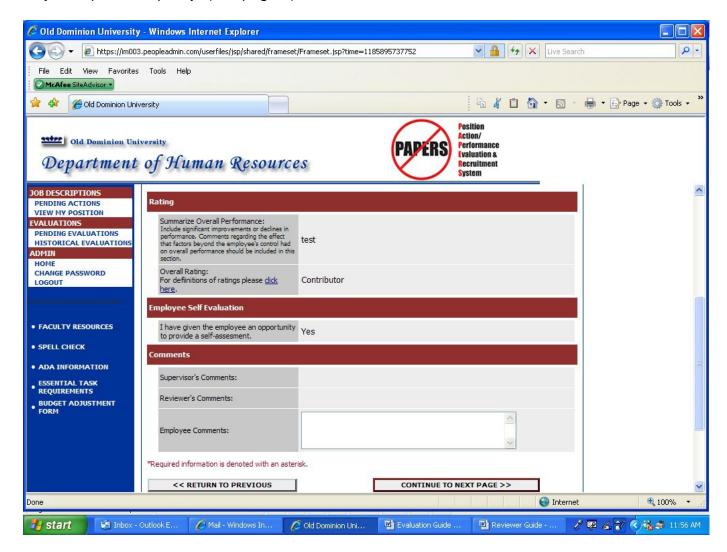
The Professional Development Goals will have defaulted from your current position description. Your supervisor is **required** to describe the accomplishment of these goals.

The Core Responsibilities, Special Assignments, University/Departmental Competencies, and Development Plan (Professional Development Goals) create the total performance plan on which you are evaluated.



The next section is the **Overall Rating/Comments Tab.**

The supervisor should have entered a rating that is supported by the individual ratings in each prior section of the evaluation as well as appropriate comments summarizing your overall performance. The supervisor should have also indicated whether or not he/she gave you the opportunity to provide him/her with a self-evaluation which is **required** per state policy. (see page 4)



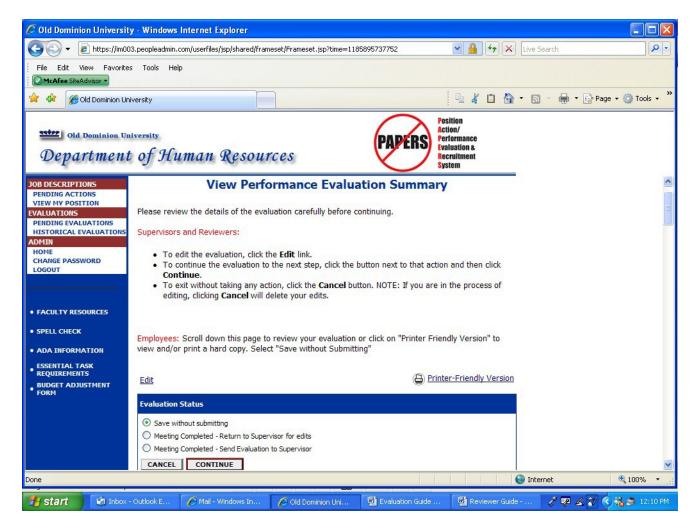
There is also an **Employee's Comments field** on this page in which you may enter comments regarding the evaluation. **Note: All comments you enter on this page will be viewable not only by you, but by the Supervisor, the Reviewer, and Human Resources' staff.**

If your supervisor indicated an overall rating of Extraordinary Contributor or Below Contributor, the next section is where the supervisor should have attached the appropriate forms to support those ratings, which is required. The originals of these forms would have been issued to you during the performance cycle.

Click on Continue to Next Page.

Once you have reviewed all the information on all the pages, and entered comments (which you will have another opportunity to do later), Click on Save Without submitting to save the evaluation until you meet with your supervisor for an in-depth discussion. You can print a copy to have in front of you during the meeting by clicking on Printer-Friendly Version.

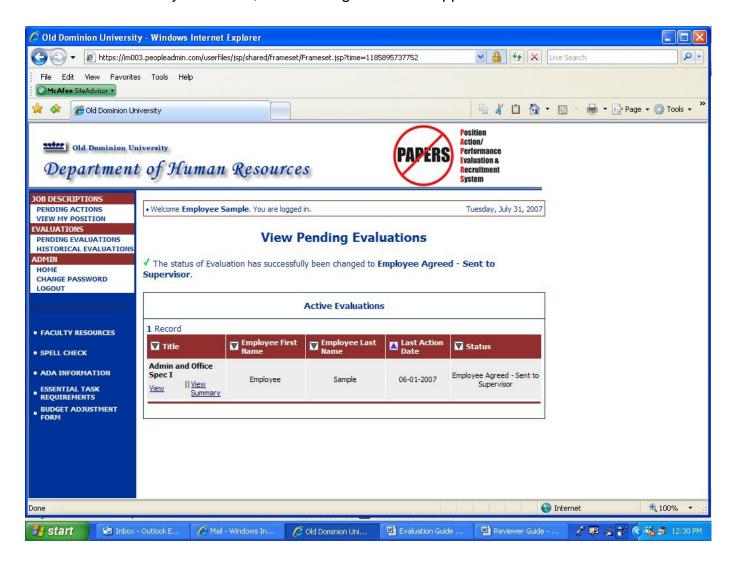
After the meeting, login to https://olddominion.peopleadmin.com/hr and click on the "Pending Evaluations" link in the Evaluations section of the navigation bar on the left of the screen. The following screen will appear:



If, during the meeting, you and your supervisor agreed that he/she will make some revisions, click on **Meeting Completed – Return to Supervisor for Edits**. Then click on **Continue** and then on **Confirm** and the process will be repeated. All edits must be approved by the Reviewer.

If you are not requesting any revisions, click on **Meeting Completed – Send Evaluation to Supervisor**. Then click on **Continue** and then on **Confirm**. This will return the evaluation to your supervisor so that he/she can send it to Human Resources.

Whichever selection you choose, the following screen will appear:



Note the statement following the green check mark on the above screen. (above the Active Evaluations box) This confirms that the evaluation was submitted back to the Supervisor. An e-mail will be sent to the Supervisor notifying him/her that the evaluation is waiting for him/her to either revise or submit to Human Resources.

You can now logout of the system by clicking on the **Logout** link in the **Admin** section of the navigation bar on the left of the screen.

NOTE: If you have concerns about any ratings or comments, you may initiate an appeal separate from this on-line process by contacting Human Resources - Employee Relations. Any changes made as a result of an appeal will be subject to approval by the Reviewer.

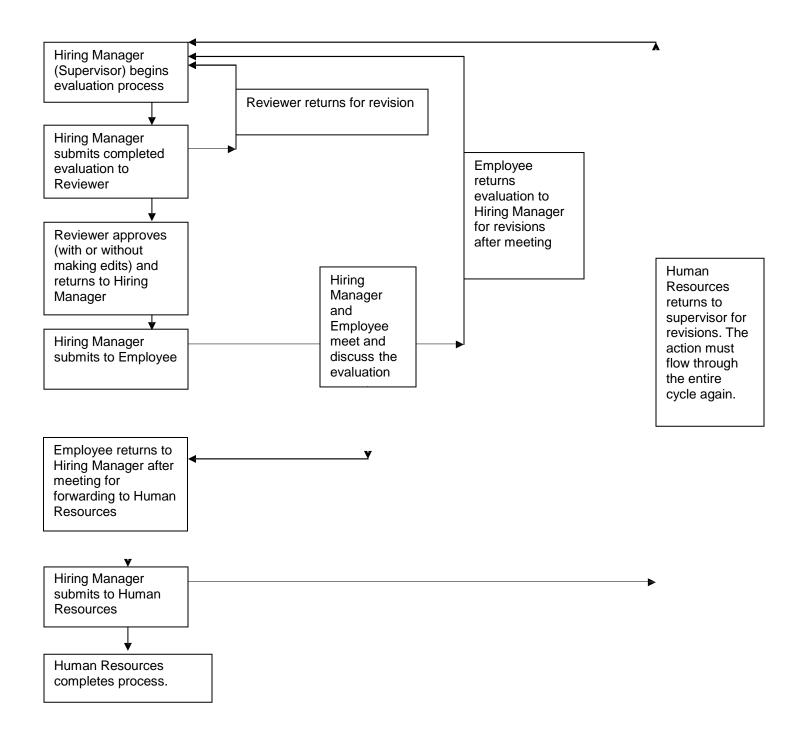
CERTIFYING YOUR POSITION DESCRIPTION FOR THE NEXT PERFORMANCE CYCLE

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After your evaluation has been submitted to Human Resources, your supervisor will review your current position description and verify that it is up-to-date. Changes for the next performance cycle will be made at this time and a new Development Plan will be established.

The position description will be sent to you in PAPERS for certification.

CLASSIFIED EVALUATION WORKFLOW



PAPERS PERFORMANCE EVALUATION PROCESS Quick Guide for Supervisors

At least two weeks prior to completing the evaluation, provide the employee with the opportunity to give you a written self-evaluation.

Once you receive the employee's self-evaluation, go to https://olddominion.peopleadmin.com/hr, and click on **Begin New Performance Evaluation**.

Enter the Employee's name or position number and Click on **Search**.

Select "Start Action" under the Role Title of the position.

Complete the information on each Tab in the Evaluation using the **Continue to Next Page** button to navigate through the form.

A rating and comments are required for **each** Core Responsibility, Special Assignment, and University/Departmental Competency as well as the Overall Rating and comments.

A description of the accomplishments of the Professional Development Goals are also **required**.

Supplemental documents **MUST** be attached for **Overall Ratings** of Extraordinary Contributor or Below Contributor.

Comments on the **Supervisor/Reviewer/HR Tab** at the beginning of the evaluation are not viewable by the employee and are meant to be a communication tool between the Supervisor, Reviewer, and Human Resources staff as the evaluation moves through the process.

Comments entered on Overall Rating/Comments Tab are viewable by the Reviewer, Supervisor, Employee and Human Resources staff.

If you need to save the evaluation before you have completed the process, Click on **Save without Submitting**. You can return to the evaluation by clicking on **Pending Evaluations**.

When you have completed the evaluation and attached the supporting documents, Click on **Submit Evaluation to Reviewer.**

When the Reviewer approves the evaluation and returns it to you, send it to the employee by clicking on Submit Evaluation to Employee and call or e-mail the employee to schedule a meeting to discuss the evaluation.

The employee sends the evaluation back to you after the meeting.

If you agreed to make some revisions, you will forward the evaluation back to the Reviewer after making those revisions and the steps above will repeat.

If no revisions were requested by the employee, send the evaluation to Human Resources.

PAPERS CLASSIFIED EVALUATION PROCESS Quick Guide for Reviewers

Evaluation Details

This section provides the incumbent's name, position number, title, pay band, reporting line.

Editing

 A Reviewer can edit ratings and comments which were entered by the Supervisor or return the evaluation to the Supervisor requesting edits.

Core Responsibilities

- How many responsibilities are listed** and does the percentage for tasks listed total 100?
- Are there ratings and comments for each responsibility?

Special Assignments

- How many are listed?**
- Are there ratings and comments for each special assignment?

<u>University/Departmental Competencies</u>

- How many competencies are listed?**
- Must be rated on Customer Relations which includes a statement on compliance with the University's Code of Ethics.
- Are there ratings and comments for each competency?

** The total of Core Responsibilities plus Special Assignments plus University/Departmental Competencies cannot be less than 3 or greater than 10.

Professional Development

- Development goals should be job-related and support career growth.
- Are there comments regarding the accomplishment of these goals?

Overall Rating/Comments

- Is there an overall rating entered that is supported by the individual ratings in each prior section of the evaluation?
- Are there appropriate comments summarizing the employee's overall performance?

Attach Documents

 Are appropriate documents attached to support an Overall Rating of either Extraordinary Contributor or Below Contributor?

Comments

- Comments on the Supervisor/Reviewer/HR Tab at the beginning of the evaluation are not viewable by the employee and are meant to be a communication tool between the Supervisor, Reviewer, and Human Resources staff as the evaluation moves through the process.
- Comments entered on Overall Rating/Comments Tab are viewable by the Reviewer, Supervisor, Employee and Human Resources staff.

PAPERS PERFORMANCE EVALUATION PROCESS Quick Guide for Employees

At least two weeks prior to completing the evaluation, your supervisor will provide you with the opportunity to give him/her a written self-evaluation.

After your supervisor has completed the evaluation in PAPERS, you will receive either an email or a call letting you know the evaluation is waiting for you.

Go to https://olddominion.peopleadmin.com/hr, and click on

Pending Evaluations. Click on "View" under your position title.

Click on the <u>Edit</u> link. (Although this link provides you with access to review the Evaluation section-by-section, you do **NOT** have the ability to edit any of the information your supervisor has entered.

Review the information in each section of the Evaluation by using the **Continue to Next Page** button to move through the form.

- a. Your supervisor was **required** to enter a rating and comments for **each** Core Responsibility, Special Assignment, and University/Departmental Competency as well as for the Overall Rating and comments.
- b. Your supervisor was also required to enter information regarding the accomplishment of your Professional Development Goals.
- c. Supplemental documents to support an **Overall Rating** of Extraordinary Contributor or Below Contributor **MUST** also be attached.
- d. Save the evaluation until you have met with your supervisor by clicking on **Save without Submitting**.

After meeting with your supervisor and discussing the evaluation, return to the evaluation by going to https://olddominion.peopleadmin.com/hr, and clicking on **Pending Evaluations**. Click on "View" under your position title.

Submit the evaluation to your supervisor by either clicking on **Meeting Completed – Return to Supervisor for Edits** or **Meeting Completed – Send Evaluation to Supervisor.**

a. If you returned the evaluation to your supervisor for edits, once the Reviewer has approved the edits, your supervisor will return it to you for you to review again.

Go to https://olddominion.peopleadmin.com/hr, and click on Pending Evaluations. Click on "View" under your position title.

Click on the **Edit** link.

You will repeat the process again.

b. If you returned the evaluation to your supervisor with a status of **Meeting Completed – Send Evaluation to Supervisor**, you supervisor will submit it to Human Resources

If you have concerns about any ratings or comments, you may initiate an appeal separate from this on-line process by contacting Human Resources - Employee Relations. Any changes made as a result of an appeal will be subject to approval by the Reviewer.