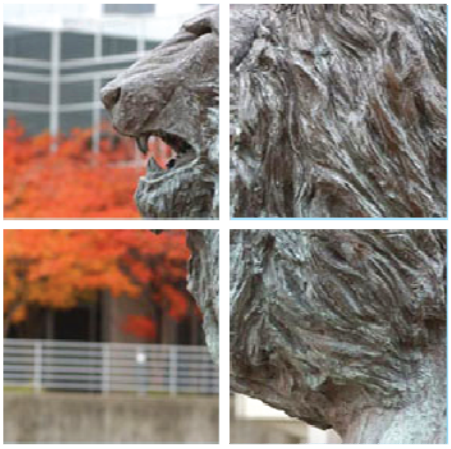
OLD DOMINION UNIVERSITY

IDEA FUSION



Classified Performance Evaluations

PAPERS7

Department of Human Resources
October 2015

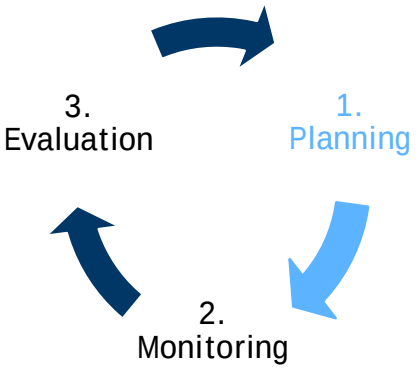
Overview

- Changes
- Performance Plan
- Monitoring
- Self Evaluation
- Performance Evaluation
- Interim/Probationary
- Auto save feature!!

Changes

- Performance Plan
  - Not PD Certification
- Position Description located in Class & Comp module
- Performance Management Module with:
  - Plan
  - Documentation
  - Forms
  - Self Evaluation
  - Supervisors Evaluation

Performance Cycle



**Handout A – Performance Plan Workflow

Performance Plan

- Intention
  - Make it clear to the employee what they are supposed to do.
  - The outcome: what they need to know and how to achieve the desired results.
  - Translating tasks into how they are completed.
- The Performance Plan is what will be used for the 2016 evaluation.
  - Evaluating the employee against the Performance Plan in addition to the Position Description.

Performance Plan Examples

Facilities • Resident requested work orders are completed within seven days. • Create/maintain a log to track and verify that work orders are addressed within seven days.	**Technical** • Using a log of all equipment, inspects scientific equipment at least monthly and records findings. • Submit monthly reports on all repair and replacement requests; include status on repair or replacement ordered.
Administrative Support • Provide direct answers to constituents without having to transfer them to several people. • Shadow two other employees during the year to learn their role and their function in the program so you can respond to questions from constituents.	**Financial** • Plan and oversee the annual cash closing process with the Department of Accounts. • Schedule annual meeting, and quarterly meetings, with Accounting to ensure the cash closing process is completed on time.
More examples will be available soon	

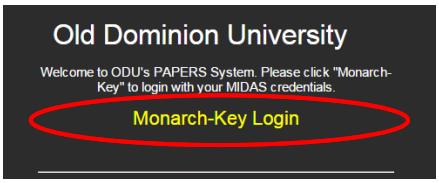
Establishing Goals

- Resources include:
  - The employee
  - The reviewer
  - Employee Relations

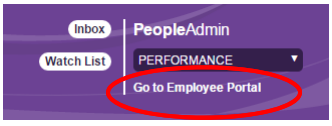
Note – In PAPERS7, the employee cannot return, reject, or appeal the performance plan.

Getting Started

Log into PAPERS 7



Use the Monarch-Key Login

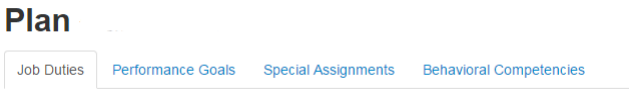


In the upper right hand corner, change the module to "PERFORMANCE" and then GO TO EMPLOYEE PORTAL.

***Handout B – Quick Guide*

Creating the Performance Plan

- Select "Manager Creates Plan"
  - Can view the position description
  - CANNOT change the position description.
    - Function tabs located at the top of the page.
  - Add Performance Goals for the new performance plan cycle.
  - Select "Complete" located at the bottom of the last tab to route to Reviewer for approval.



Creating the Performance Plan

Review/Approve the Performance Plan

- Reviewer gets an email notification.
- Reviewer reviews the performance plan.
  - Make comments and approve
    - If approved – the Supervisor then schedules a meeting with the employee to discuss the plan.
  - Make comments and return
    - If returned – the Supervisor should discuss changes with the Reviewer before submitting it for approval again.
  - Employee will not be able to view comments

Performance Plan Approved or Returned

Approved

Supervisor schedules a meeting with the employee to discuss.

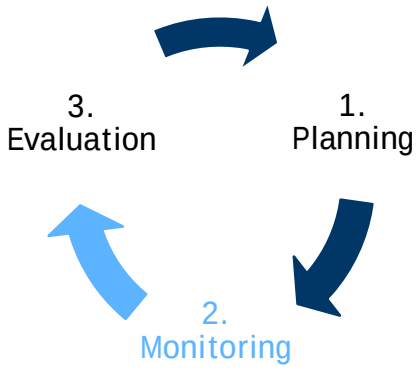
Returned

Supervisor revises, discussed changes with the Reviewer and re-submits.

Routing Performance Plan to Employee

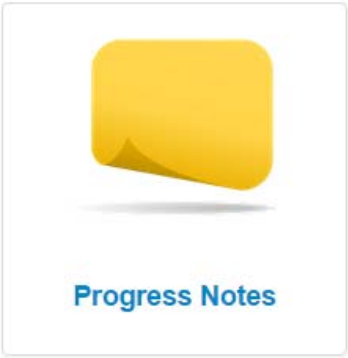
- Once approved, the Supervisor will "Route Plan to Employee"
  - Schedule a meeting to discuss
    - All scheduling is done externally from PAPERS7
  - The employee acknowledges the plan.
    - Recommended to wait until after the meeting to acknowledge the plan.
- Due by December 1st

Performance Cycle

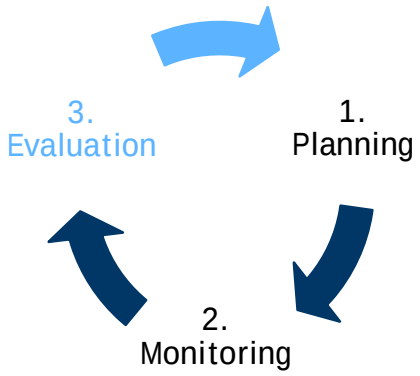


Monitoring Performance

- Available to both employee and supervisor
  - **Only visible to the user**
  - HR cannot access notes
- Easy to:
  - Document progress on tasks
  - Track completion and dates
  - Print and share for performance evaluation meetings/self evaluations
- Optional tool



Performance Cycle



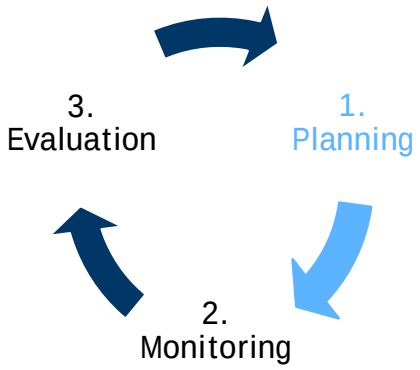
Self Evaluation

- Online in PAPERS7
  - Very helpful and highly recommended
  - Performance Plan from previous year included
- Supervisor will be able to view online
  - Discuss self evaluation with employee
  - Incorporate employee's opinion when possible

Supervisor Evaluation

- Performance Plan from the previous year will be included
- Same process as before:
  - Self Evaluation
  - Supervisor Evaluation
  - Route to Reviewer
  - Approved/changes requested by Reviewer
  - Meet with employee/route performance evaluation
  - Employee acknowledges
  - Route evaluation to HR

Performance Cycle



Supervisor Evaluation

- Create the performance plan for the next year

Probationary and Interim Evaluations

- Interim
- 6 Month
- 12 Month
  - All will be available online through PAPERS7
  - Email notification will continue
    - Follow the included instructions
- Notice of Improvement Needed – will continue to be a paper form

Demonstration

PAPERS7 DEMONSTRATION

Session Feedback Forms

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QUESTIONS?