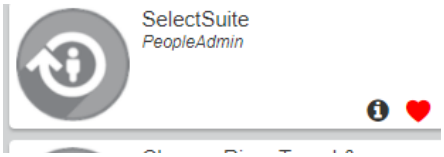
COMPLETING THE PERFORMANCE PLAN - AP

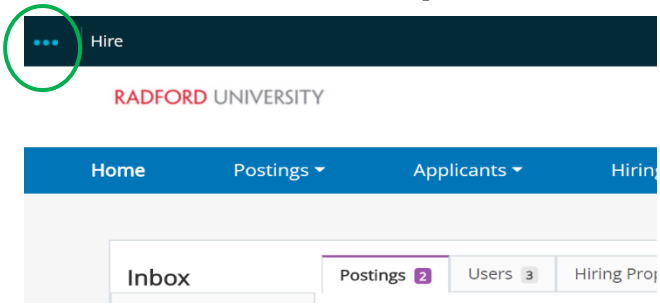
Rev. 11/2/2020

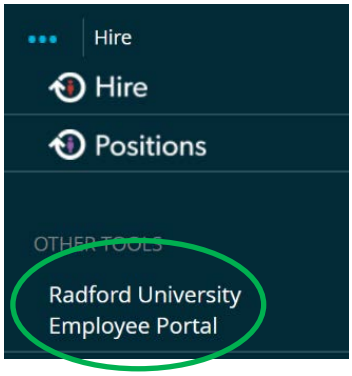
PeopleAdmin is part of Radford University's single sign-on. This means that it is accessible through your OneCampus Portal.

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

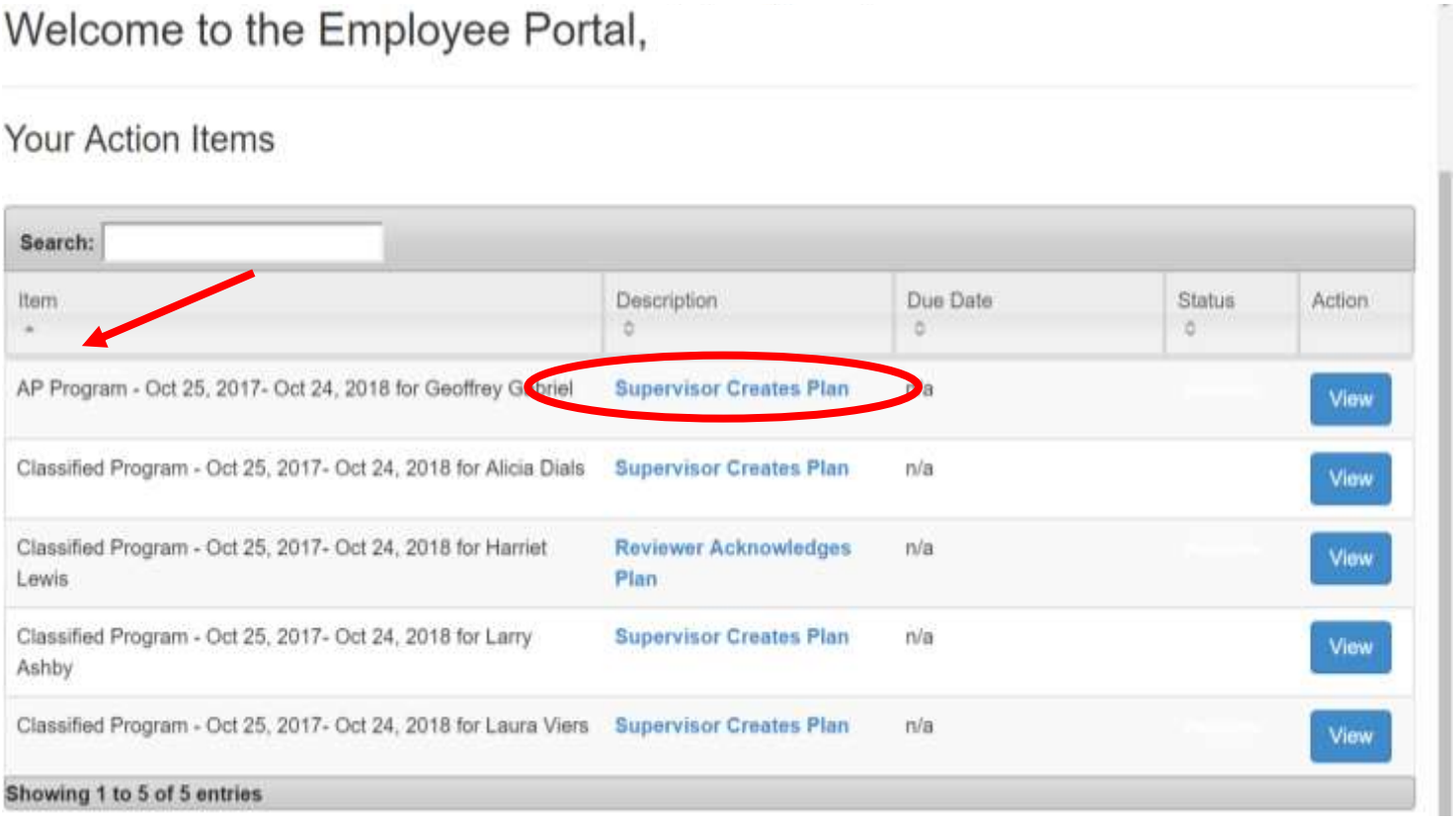


2. The landing page will usually appear as the Applicant Tracking page and the banner should be blue. No matter the page you land on, select the three blue dots on the top. From this menu, select the option Radford University Employee Portal





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.



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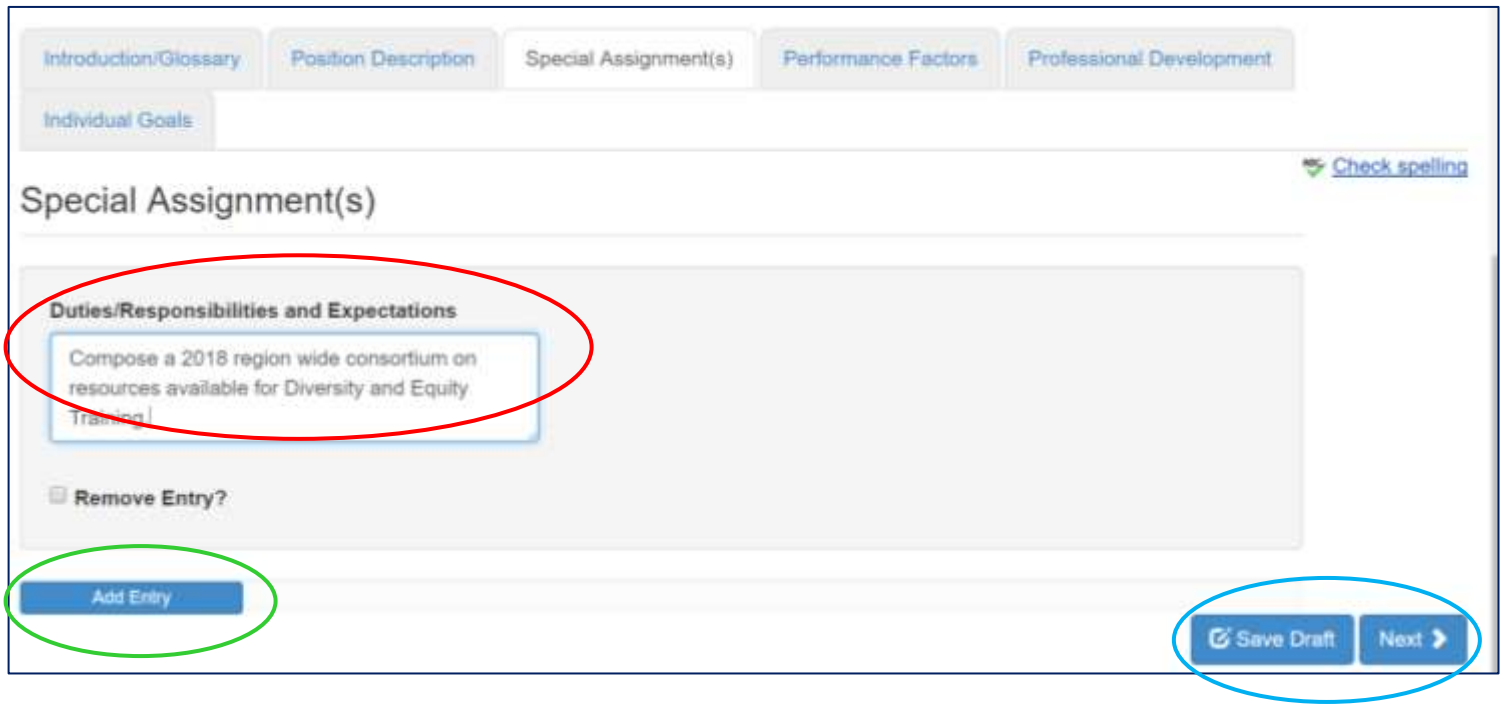
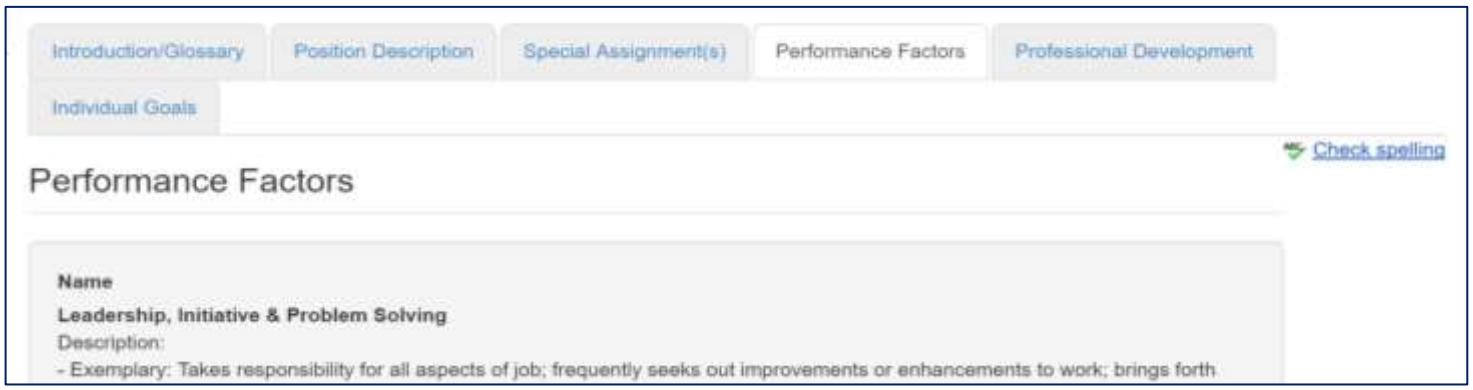
4. The first tab you will land on is the **Introduction/Glossary** Tab. No changes are needed on this tab. Review as needed. Select the Next option.

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.

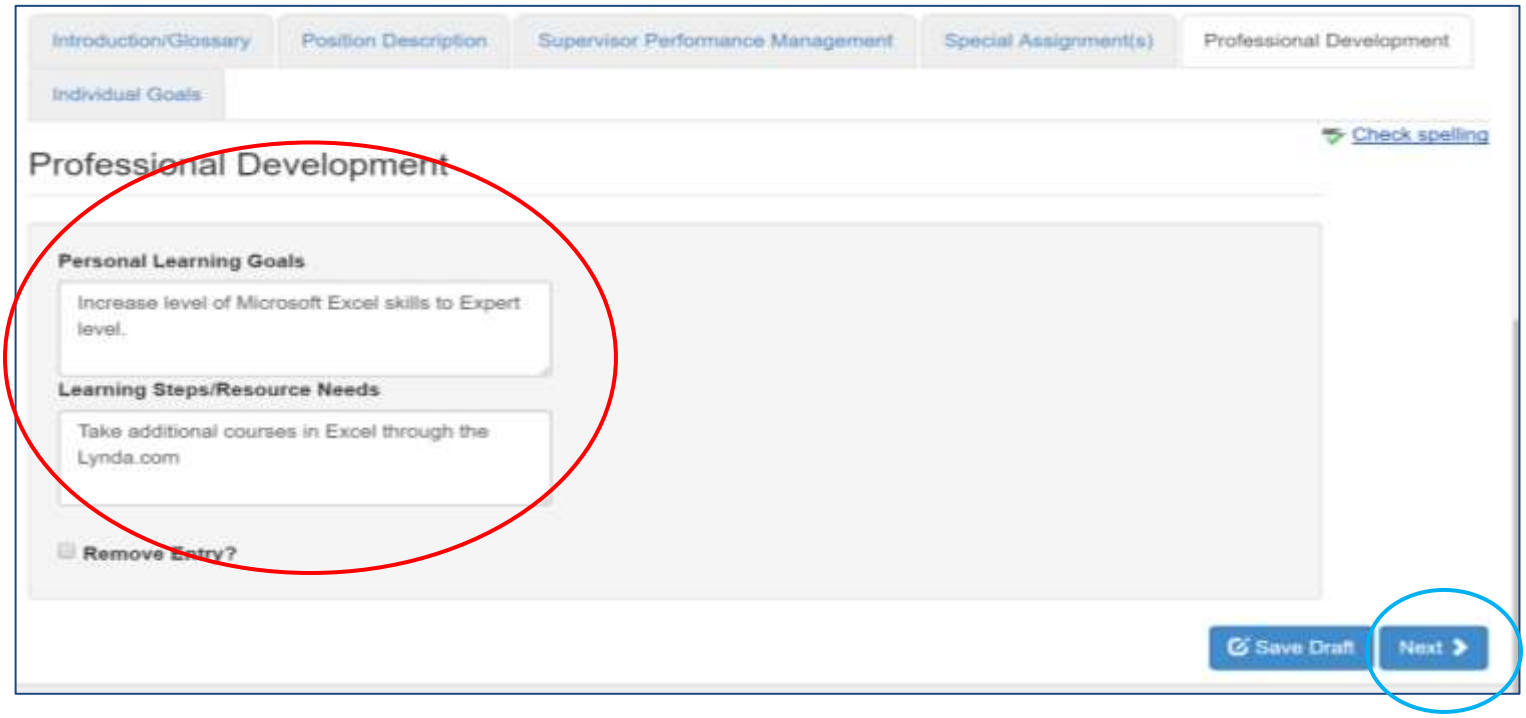
6. The next tab you will land on is the **Special Assignment** Tab. If your employee has a special assignment, (a task that is assigned that is not part of the core responsibilities and would not carry over from year to year) input the assignment details in this block. If you need to add additional assignments, 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.



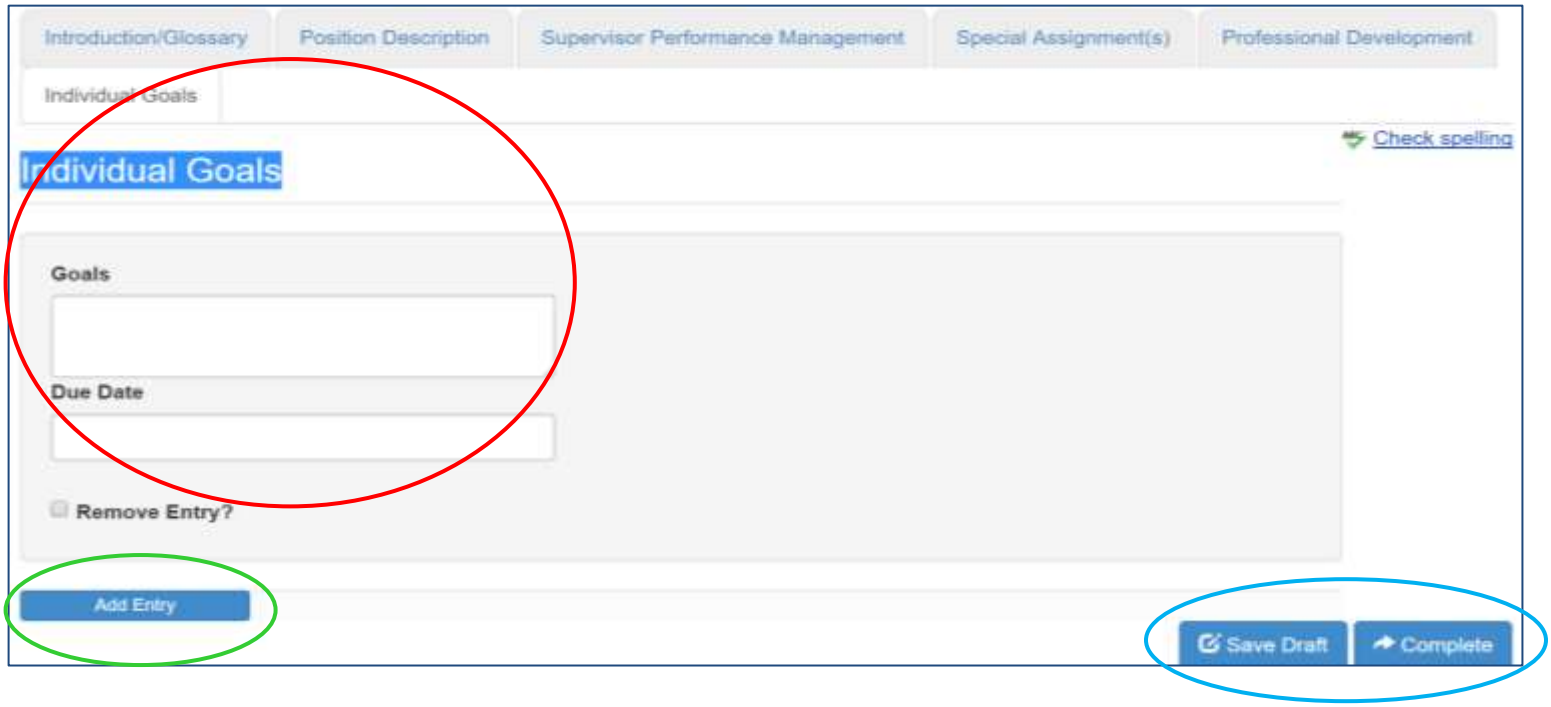
7. The next tab you will land on is the **Performance Factors** Tab. Universal Performance Factors will automatically populate here. Review as needed. Select the Next Option.



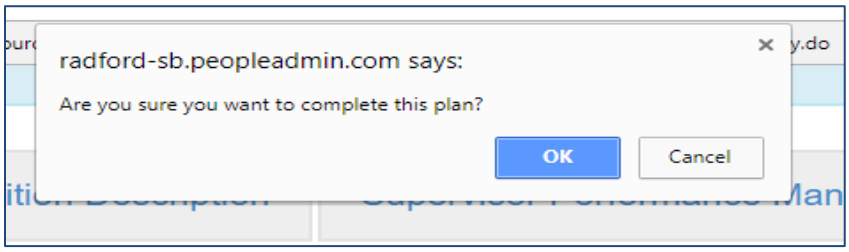
8. The next tab you will land on is the **Professional Development** Tab. If your employee has areas in which the employee would benefit from more training; training that is essential to the employee's core responsibilities; or areas of development that interest the employee, add those items here. Select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



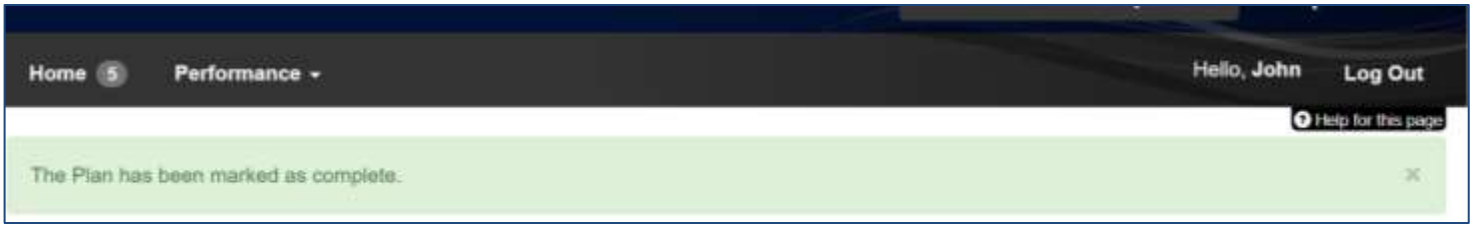
9. The next tab you will land on is the **Individual Goals** Tab. This can include objectives in terms of complexity, accountability and results that are specific, measurable, attainable and relevant (SMART goals.) Add these items here. A due date can be added if needed. If you need to add additional 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.



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***

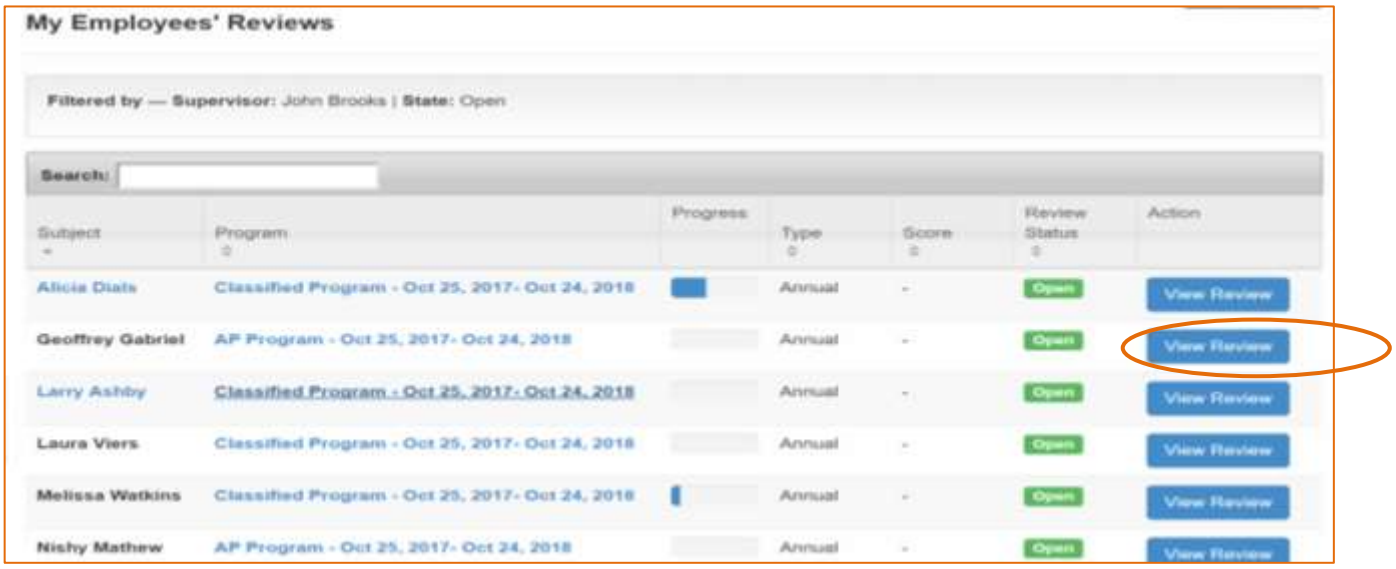
To Revise the plan

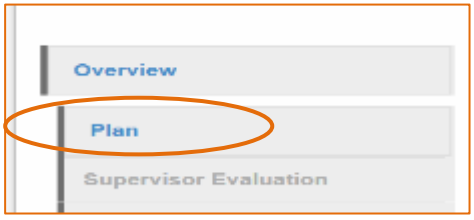
a. Beginning on your **Home** Screen, select

at the left side of the screen.

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

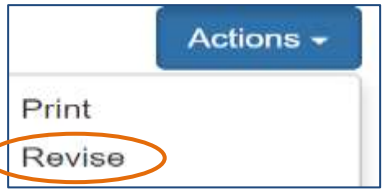
c. You should now see the employee's name in the center screen (see below). Click on **View Review**

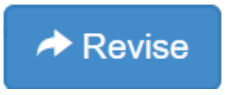




d. On the left side of your screen, click **Plan**

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

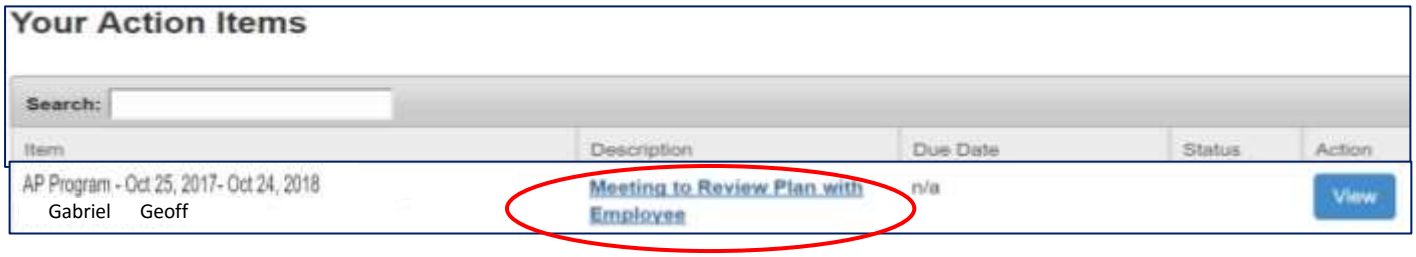


f. After all of the revisions have been made, click on  located at the very bottom of your screen.

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

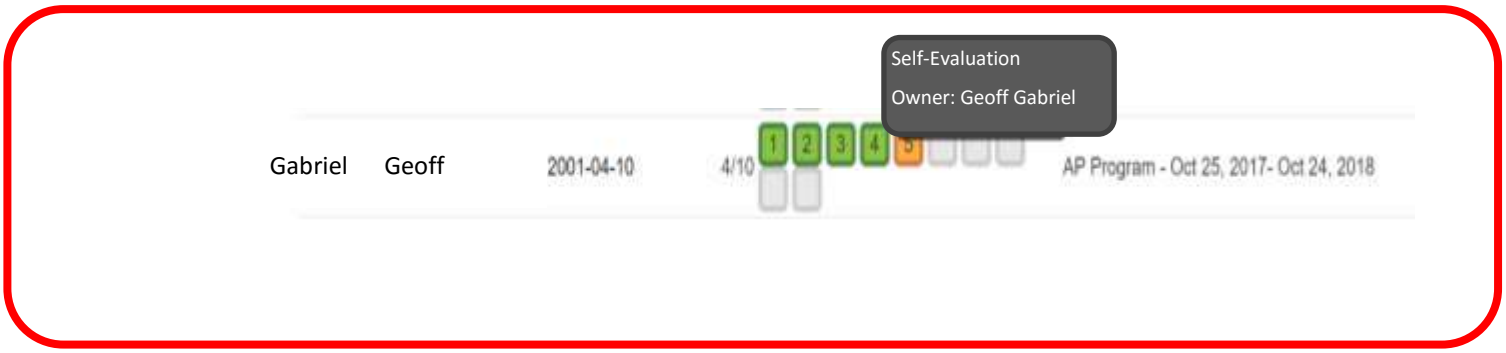
h. If you look at your Dashboard, you will notice the Plan is now back at Stage 2, **Reviewer Acknowledges Plan.**

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