

# WaynePM Planning & Manager Notes Training for Supervisors

Facilitator:

Elizabeth Rager, Organization & Employee Development

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# Introduction

This session will familiarize supervisors with the WaynePM system and will focus on the annual review planning process for P&A employees and Staff Association employees. Upon completion of this session, supervisors will be able to:

- ▶ Log in to WaynePM and Identify items on the Home Page
- ▶ Navigate WaynePM, identify icons, and personalize your view of the system
- ▶ Use WaynePM to handle common system tasks
- ▶ Use WaynePM to handle annual review planning tasks
- ▶ Use WaynePM for ongoing performance tasks



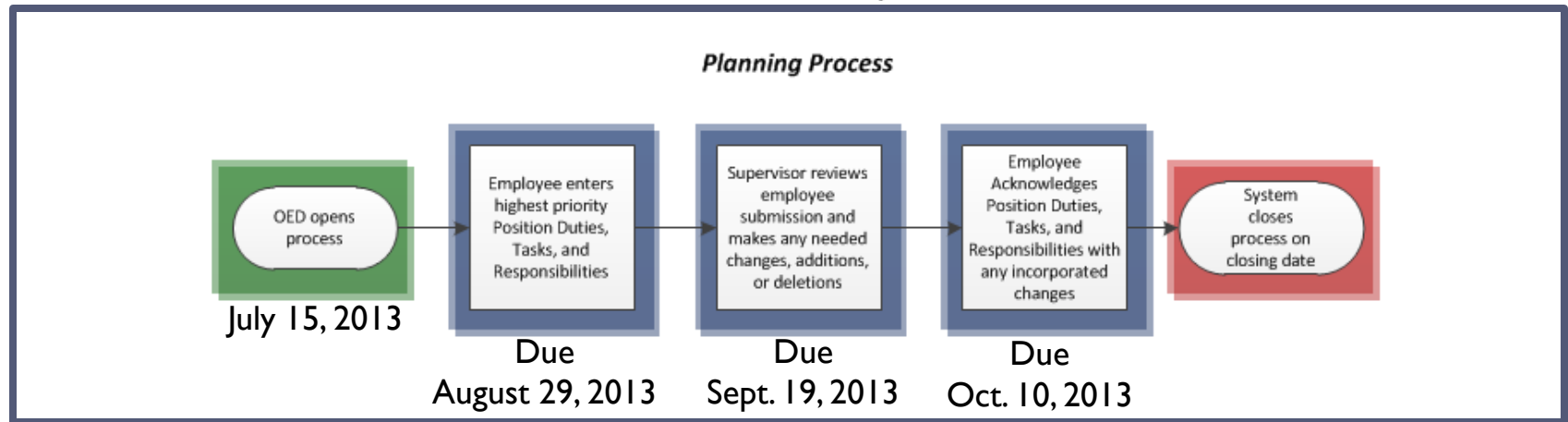
# WaynePM Glossary

- ▶ Activity Tracker
- ▶ Annual Review Form
- ▶ Employee Planning & Assessment Form
- ▶ Evaluations
- ▶ Feedback
- ▶ Language Checker
- ▶ My Performance
- ▶ Notes
- ▶ Options
- ▶ Planning Annual Review Form
- ▶ Profile
- ▶ Self Appraisal
- ▶ Self Evaluation

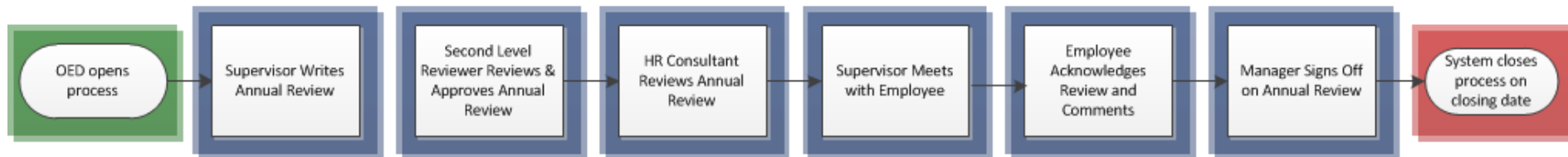


# Annual Review Processes: Planning

## Non-Academic, Represented Performance Management Process (Annual Review Form)

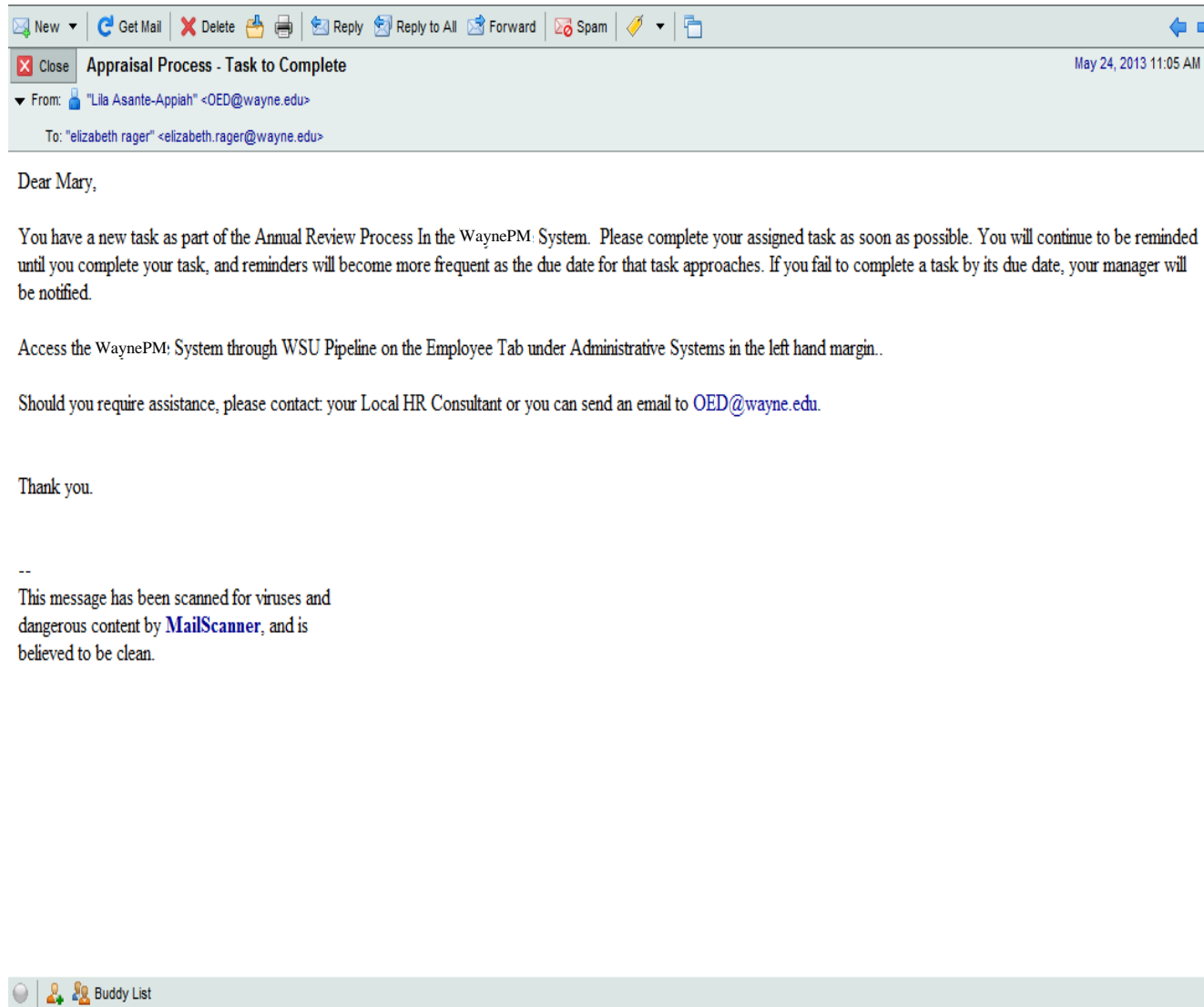


## Annual Review Process



# Email Notification

When the process opens or you have a task to do, you will receive an Email notification similar to this.



# Logging in to WaynePM

1. Login into **WSU Pipeline** with your **Access ID** and **Pipeline Password**
2. Go to the **Employee Tab**
3. Look under **Administrative Systems** and find **WaynePM** & click the link

The screenshot shows the Wayne State University Employee Services portal. At the top, a green banner displays 'WAYNE STATE UNIVERSITY' and a search bar. Below this, a welcome message for Elizabeth Anne Rager is shown, dated July 2, 2013. A navigation bar contains tabs for 'My Pipeline', 'Student', 'Financial Aid', 'Employee', 'Workflow', and 'BI Reporting'. The 'Employee' tab is highlighted with a blue box and a callout bubble containing the number '2'. Below the navigation bar, the 'Employee Services' section is visible, featuring a 'Blackboard' link and an 'Employee Self-Service' menu. The 'Administrative Systems' link is highlighted with a blue box and a callout bubble containing the number '3'. Under 'Administrative Systems', the 'WaynePM' link is also highlighted with a blue box. To the right, there are 'Employee Announcements' including 'The WSU Mort Har needs you', 'Quality of Life Survey', and 'Open Lab'.



# Viewing WaynePM Home Page

1. Navigation Bar
2. Welcome
3. Tasks
4. Activity Tracker
5. Task Status Legend
6. Useful Links
7. Log out

The screenshot displays the WaynePM Performance Management interface. At the top, the logo 'WaynePM Performance Management' is visible. Below it is a navigation bar with 'Home' and 'My Performance' tabs. A welcome message reads: 'Welcome super ADMIN. You are currently logged in as Jacob D Kinde'. The main content area is titled 'My Tasks (You have tasks to do)' and includes a table with columns for 'Status' and 'Task'. A task entry is shown: 'My Evaluation: Annual Review Planning - WSU Test 1 | Status' with a yellow dot icon and the text 'Complete Job Duties, Tasks and Responsibilities/Goals'. An 'Activity Tracker' sidebar is open, showing a 'Group by: Date' dropdown and a list of activities under 'Today (1)', including 'Self-Appraisal' and 'Annual Review Planning - WSU Test ...' completed on 06/05/2013. At the bottom, a 'Task Status Legend' shows icons for 'Overdue' (red triangle), 'My To-Do' (yellow circle), 'Sent for Review' (blue clock), 'Not Ready' (grey circle with slash), and 'Completed' (green checkmark). A 'Useful Links' section contains a link to 'WaynePM'. A top-right menu contains 'Logout', a gear icon, and a question mark icon.



## Status Link

1. The **Status** link will tell you what step this is in the series of steps.

2. Remember the **Status** legend. The orange ball means **My To-Do**

**Note:** Rollovers are available for the tasks that may provide a little bit more information and direction.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home' and 'My Performance'. Below the navigation bar, a welcome message reads: 'Welcome super ADMIN. You are currently logged in as Jacob D Kinde'. A yellow banner highlights 'My Tasks (You have tasks to do)'. A table below shows a task titled 'My Evaluation: Annual Review Planning - WSU Test 1' with a 'Status' link circled in blue. A yellow callout box points to an orange ball icon next to the task, containing the text: 'Employee please complete you job duites, tasks, responsibilites/goals to be approved by your supervisor. If there are changes that the supervisor would like to make, he/she might want to set up a meeting with you to discuss.' Below this is a modal window titled 'Annual Review Planning - WSU Test 1' with a table of steps. The first row shows 'Employee Completes Job Duties, Task and Responsibilities/Goals' with an orange ball icon circled in blue. At the bottom, a status legend shows five icons: a red triangle for 'Overdue', an orange ball for 'My To-Do' (circled in blue), a blue clock for 'Sent for Review', a grey circle with a slash for 'Not Ready', and a green checkmark for 'Completed'. A 'Close' button is visible in the modal window.

Step	Status	Due Date	Person Responsible
Employee Completes Job Duties, Task and Responsibilities/Goals	●	06/14/2013	Jacob Kinde
Manager Reviews and Finalizes Employee Job Duties and Responsibilities	⊘	06/14/2013	Alicia Pendleton
Employee Acknowledges Job Duties, Tasks and Responsibilities/Goals	⊘	06/14/2013	Jacob Kinde
Additional Feedback on Employee Job Duties and Responsibilities	⊘	06/14/2013	N/A

**Note**

1

2

Overdue ● My To-Do ⌚ Sent for Review ⊘ Not Ready ✓ Completed





# Planning Annual Review Form: General

Once the employee clicks on the task, the form to use will display:

- 1. Form Navigator** allows you to move from one section to another quickly or you can use the scroll bar on the right.
- 2. The Navigation Bar with Icons** is defined to the right.
- 3. Save/Complete**

The screenshot shows the 'Planning Annual Review Form' interface for Jacob D Kinde. The page title is 'Complete Job Duties, Tasks and Responsibilities/Goals'. The form is titled 'Annual Review Planning - WSU Test 1 By Jacob D Kinde'. The Wayne State logo is prominently displayed in the center. The form is divided into sections: 'Employee Identification' and 'Accomplishments of Position Duties, Tasks and Responsibilities/Goals'. The 'Employee Identification' section contains fields for Employee Name (Jacob Kinde), Banner ID (368872), School/College/Division (Human Resources), Department (HR Client Services), and Job Title (Assistant to the Director). The 'Accomplishments' section has a 'Review Period' with 'From' and 'To' date pickers. A 'Form Navigator' on the left lists sections: 'Planning Annual Review Form', 'Employee Identification', 'Accomplishments of Position Duties, Tasks and Responsibilities/Goals', and 'Development Plan'. A 'Navigation Bar' at the bottom features icons for 'Expand / Collapse Form Navigator', 'Print', 'Show as a PDF', 'Check Spelling', 'Check Language', and 'Split Screen'. A 'Save/Complete' button is located in the top right corner. A dropdown menu for 'Employee Records' is open at the bottom, listing 'Profile', 'Goals', 'Development Plans', 'Feedback', 'Past Appraisals', and 'Documents'. The Wayne State logo is also present in the bottom right corner.

# Planning Annual Review Form: Identification


1. **Employee Identification** is prefilled except for **Review Period**.
2. **Review Period:** The employee will need to type the date or use the calendar.

Complete Job Duties, Tasks and Responsibilities/Goals Help | X

**Jacob D Kinde**

Annual Review Planning - WSU Test 1  
By Jacob D Kinde

Form Navigator: [Planning Annual Review Form](#), [Employee Identification](#), [Accomplishments of Position Duties, Tasks and Responsibilities/Goals](#), [Development Plan](#)

  
**Planning Annual Review Form**

**Employee Identification**

Employee Name:	Jacob Kinde	Banner ID#:	3688772
School/College/Division:	Human Resources	Job Title:	Assistant to the Director
Department:	HR Client Services		

Review Period: From: 05/01/2013 To:

**Accomplishments of Position Duties, Tasks and Responsibilities/Goals**

S	M	T	W	T	F	S
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today Clear

O=Outstanding E=Excellent FS=Fully Satisfactory LS=Less than Satisfactory U=Unsatisfactory



# Planning Annual Review Form: Major Duties & Responsibilities

1. The employee needs to enter in **Title** for **Objective Title**
2. Then the employee enters **Details / Description** to go in the box below. If the employee can't think of a summary **Title** for the objective, he/she can leave it blank. Or if the summary **Title** says it all, he/she can leave the **Detail / Description** box blank

**Note:** The employee can click the **Save** button at any time and come back later to finish the form.

The screenshot shows a web browser window with a form titled "Major Duties & Responsibilities (To be completed by employee)". The form has a "Save" button circled in red, with a callout box labeled "1" pointing to it. The form contains three sections, each with a "Title" field and a "Details / Description" text area. The first section has a title "Implement the Automated Performance Management System by May 2013" and a list of tasks. The second section has a title "Schedule all Director Appointments and Department Special Events" and a list of tasks. The third section has a title "Handle Department Budget" and a list of tasks. A callout box labeled "2" points to the "Details / Description" text area of the second section, with a "Note" box below it. The browser's address bar shows "http://www.waynestate.edu/".

Major Duties & Responsibilities (To be completed by employee)

**Title:** Implement the Automated Performance Management System by May 2013

- Develop the baseline Project plan by the end of January
- Establish the Implementation Team by the end of January
- Meet with Labor Relations and Union Leaders in February
- Complete the Administrators Overview Training in February
- Define Requirements in March

**Title:** Schedule all Director Appointments and Department Special Events

- Ensure there are no conflicts with Director appointments
- If any changes to Director appointments ensure notification within one hour of change
- Ensure there are no conflicts with conference rooms
- Ensure that all equipment is scheduled and set up

**Title:** Handle Department Budget

- Reconcile budget expenses against FMS reports on a monthly basis to ensure that all charges to department account are correct
- Resolve any incorrect charges with in 30 days of finding incorrect charges
- Maintains spreadsheet of all monthly expenses so that year-end budget projects can be made so department ultimately stays within budget

**Note**

**Note the *Add New* if needed.**

If an employee has more major duties than space allowed, he/she can click **Add New** to add another **Title** and **Detail / Description Box**.

The screenshot shows a software window titled "Responsibilities/Goals" with a "Help" button in the top right corner. The window contains a form with two sections. The first section has a "Title:" field containing "Supervise Office Staff" and a text area below it containing "Supervise office staff on a daily basis to ensure work is completed accurately and on time and that the staff is customer-focused." To the left of the text area are two icons: a yellow chain link and a pink leaf. The second section has an empty "Title:" field and an empty text area, also with the chain link and leaf icons to its left. At the bottom left of the form, there is a blue circular button with a plus sign and the text "Add New", which is highlighted by a blue rounded rectangle. At the bottom right, there is a "Save" button, a "Complete" button, and a small "ABC" icon with a speech bubble. The text "Development Plan" is visible at the bottom of the window.



# Planning Annual Review Form: The Development Plan

1. An employee can add a course title in the **Title** box.

2. In the bottom box the employee can enter **Detail / Description** as to when he/she plans to complete the item etc.

**Note:** If employee clicks the **Copy Icon**, a list of **Accelerate** courses will display.

The screenshot shows a web browser window with a 'Development Plan' form. The browser's address bar and toolbar are visible at the top. The form title is 'Development Plan'. Below the title, there is a text prompt: 'Identify and schedule a [redacted] professional associations, conferences, on the job training, work experience and other developmental resources.' A dark blue callout box with the word 'Note' in white text points to the 'Title' input field of the first form entry. The form contains five identical entries, each with a 'Title:' label and a large text area for details. Each entry also features a small blue 'Copy' icon and a red pencil 'Edit' icon. The 'Professional and Personal Development' section header is centered above the first entry.

# Planning Annual Review Form: The Development Plan

The employee can click on the course he/she wants or use the down arrow in the **Category** box to find course that relate to a specific category.

The system puts the title in the **Title** box and the course link in the **Detail / Description** box. The employee won't be able to add any other information.

**Copy Development Plan**

Select a development plan to copy.

Category: All

Development Plan:

- Managing Your Call Center More Efficiently
- Accounting for Companies' Stock Transactions and Dividends
- 360-Degree Performance Appraisal Simulation
- Managing Workforce Generations: Working with the 21st-century Generation Mix**
- Accounting for Merchandising Businesses
- About 360-Degree Performance Feedback
- Business Analysis: Enterprise Analysis
- Accounting Fundamentals
- ITIL 2011 Edition Foundation: ITIL and the Service Lifecycle
- Achieving Goals through Perseverance and Resilience
- Accounting for Corporations
- ITIL 2011 Edition Foundation: Continual Service Improvement
- Acting Decisively
- IT Project Management Essentials: Introduction to IT Project Management
- Adding Links and Images in Dreamweaver CS4

Description: [http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt\\_20\\_a02\\_bs\\_enus&fromShare=yes](http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt_20_a02_bs_enus&fromShare=yes)

OK Cancel

Title: [Managing Workforce Generations: Working with the 21st-century Generation Mix](http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt_20_a02_bs_enus&fromShare=yes)

[http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt\\_20\\_a02\\_bs\\_enus&fromShare=yes](http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt_20_a02_bs_enus&fromShare=yes)



# Completing Employee Task

1. When the employee is finished filling out the form, he/she clicks the **Complete** button.
2. The system will automatically spell check
3. Then the system will automatically language check

Form Navigator

Planning Annual Review Form  
Employee Identification  
Accomplishments of Position Duties, T  
Development Plan

Development Plan

Identify and schedule appropriate classes and/or professional associations, conferences, on the job training, work experience and other developmental resources.

Professional and Personal Development

Title: Managing Workforce Generations: Working with the 21st-century Generation Mix

http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt\_20\_a02\_bs\_enus&fromShare=yes

Title:

Spell Checker

Context:

Complete the Administrators Overview Training in February

Define Requirements in March

Configure Systemt & Validate in March

Establish Single-Sign on in April

Test and Confirm in April

Communicate new system In May

Train on New System in May

Not in Dictionary:

Systemt

Replace With:

Suggestion:

System

Systemata

Systema

Systems

Svstematin

Replace

Replace All

Ignore

Ignore All

Learn

Save

Cancel

Spell Checker

Spell Check Completed.

Save

Cancel

Language Checker

Language Check Completed.

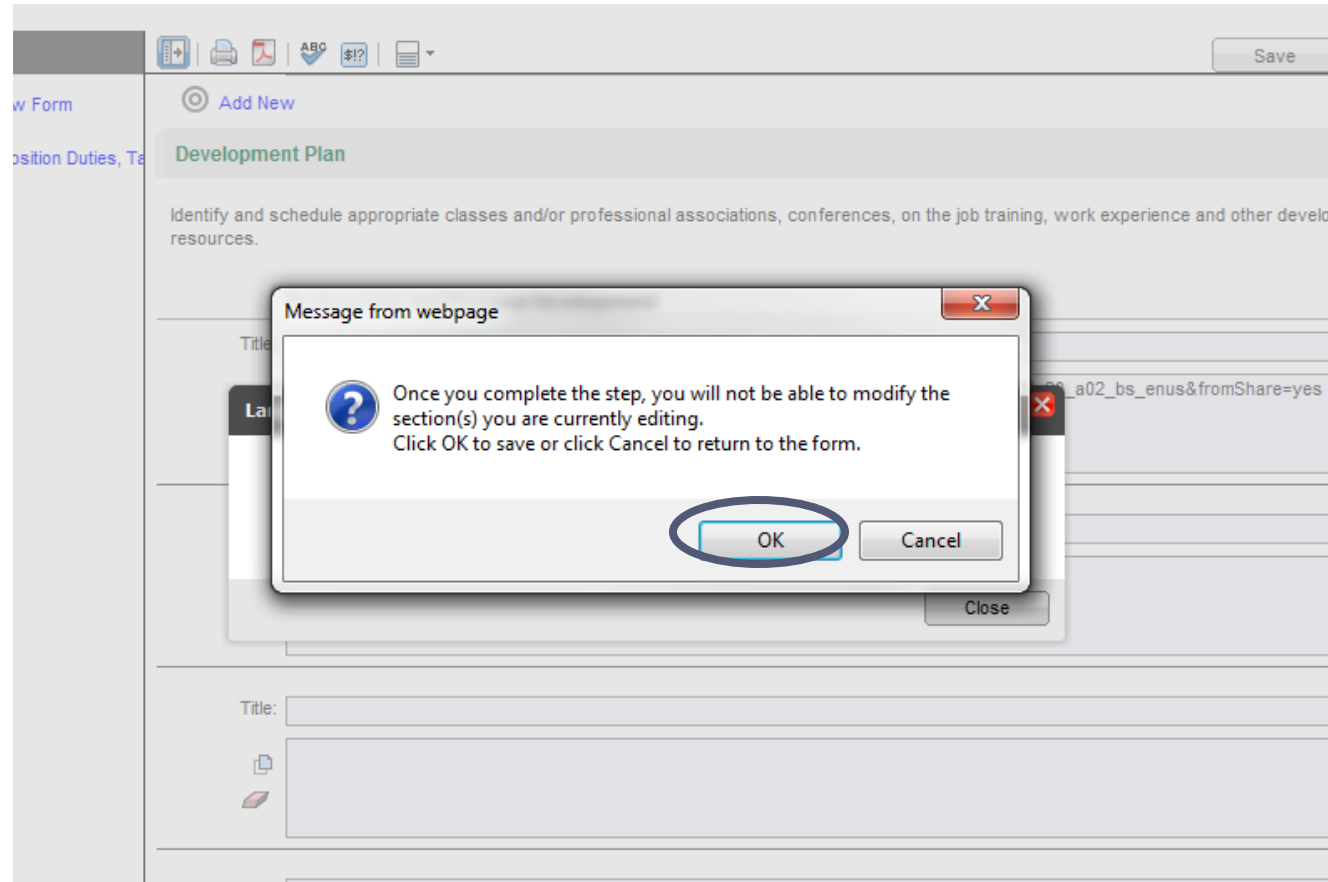
(No errors found)

Close



# Completing Employee Task


4. A dialogue box will display, letting the employee know that once he/she completes the form, he/she cannot make any changes. The employee will need to click **OK**







# Completing Employee Task


The completed form will look like this.

Just close the form after it is completed by hitting the red box with the X. You will know it is completed by the green circle with the checkmark 

Responsibilities/Goals Help | X



 Completed



## Planning Annual Review Form

**Employee Identification**

<b>Employee Name:</b> Jacob Kinde	<b>Banner ID#:</b> 3688772
<b>School/College/Division:</b> Human Resources	<b>Job Title:</b> Assistant to the Director
<b>Department:</b> HR Client Services	

**Review Period:** From: 05/01/2013 To: 04/30/2014


**Accomplishments of Position Duties, Tasks and Responsibilities/Goals**

LIST DUTIES AND RESPONSIBILITIES IN ORDER OF PRIORITY. DOCUMENT EVALUATIONS BY PROVIDING COMMENTS ON PERFORMANCE WHICH BRIEFLY DESCRIBE THE ACCOMPLISHMENTS AND JUSTIFY THE LEVEL OF EVALUATION.

This list should not be considered a complete description of all employee's duties and responsibilities.

Comments should consist of a statement indicating results achieved; also may consist of comments indicating the employee's proficiency with job related skills

Indicate one of these ratings for each duty and responsibility:



# Completing Employee Task

The completed form will look like this.

Completed

---

**Major Duties & Responsibilities (To be completed by employee)**

---

**Title:** Implement the Automated Performance Management System by May 2013  
Develop the baseline Project plan by the end of January

Establish the Implementation Team by the end of January

Meet with Labor Relations and Union Leaders in February

Complete the Administrators Overview Training in February

Define Requirements in March

Configure System & Validate in March

Establish Single-Sign on in April

Test and Confirm in April

Communicate new system In May

Train on New System in May

---

**Title:** Schedule all Director Appointments and Department Special Events  
Ensure there are no conflicts with Director appointments

If any changes to Director appointments ensure notification within one hour of change

Ensure there are no conflicts with conference rooms

Ensure that all equipment is scheduled and set up

---

**Title:** Handle Department Budget  
Reconcile budget expenses against FMS reports on a monthly basis to ensure that all charges to department account are correct

Resolve any incorrect charges with in 30 days of finding Incorrect charges

Maintains spreadsheet of all monthly expenses so that year-end budget projects can be made so department ultimately stays within budget

---

**Title:** Supervise Office Staff  
Supervise office staff on a daily basis to ensure work is completed accurately and on time and that the staff is customer-focused.

---

**Development Plan**

Identify and schedule appropriate classes and/or professional associations, conferences, on the job training, work experience and other developmental resources.

---

**Professional and Personal Development**

---

**Title:** Managing Workforce Generations: Working with the 21st-century Generation Mix  
[http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt\\_20\\_a02\\_bs\\_enus&fromShare=yes](http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt_20_a02_bs_enus&fromShare=yes)


---

**Title:**

---

**Title:**

# Completing Employee Task


It will also show completed  on the employee's task list on his/her **Home** Page.



Home My Performance

Welcome super ADMIN. You are currently logged in as Jacob D Kinde

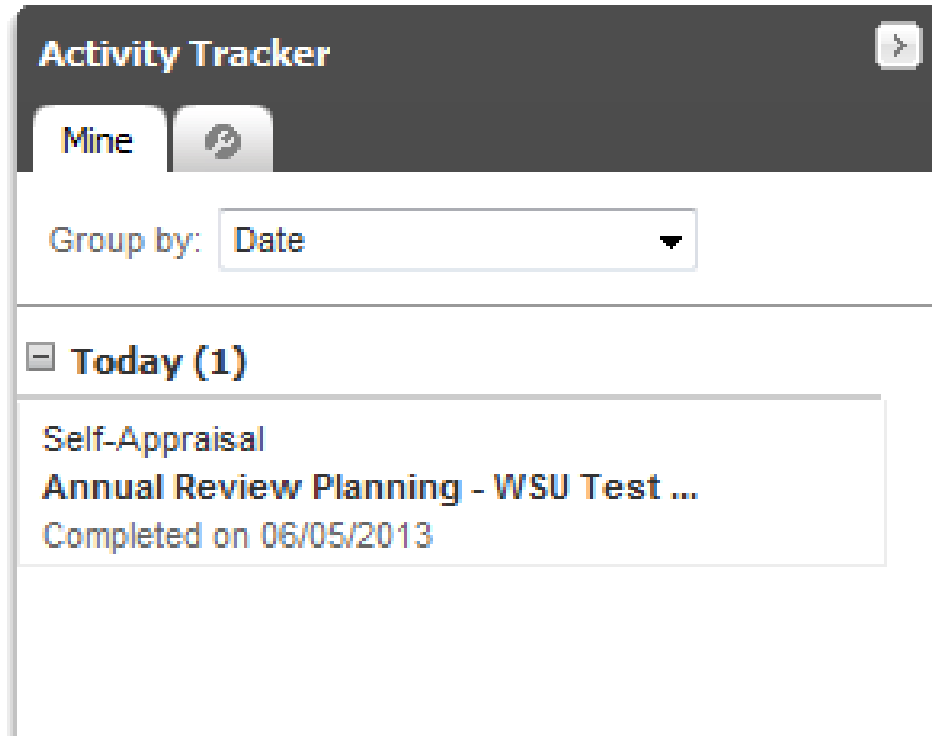
### My Tasks

Status	Task
<input type="checkbox"/>	My Evaluation: Annual Review Planning - WSU Test 1   <a href="#">Status</a>
	<a href="#">Complete Job Duties, Tasks and Responsibilities/Goals</a>



## The Activity Tracker

The employee's **Activity Tracker** will now show that a completed a task. The system will call it a *Self Appraisal* only because the employee completed it...not because it was a self appraisal.



The screenshot displays the 'Activity Tracker' interface. At the top, there is a dark header with the title 'Activity Tracker' and a refresh icon. Below the header, there are two buttons: 'Mine' and a circular icon with a refresh symbol. A 'Group by:' dropdown menu is set to 'Date'. The main content area shows a section titled 'Today (1)' with a minus sign icon. Underneath, a task is listed: 'Self-Appraisal Annual Review Planning - WSU Test ...' with a completion date of 'Completed on 06/05/2013'.

# Review and Finalize Employees Submitted Job Duties....

Along with own tasks, you will now have a task to review the duties submitted.

1. You can click the task and all you **Direct Reports** in the process will show; whether they completed their task or not.
2. If you click the **Quick Selector** icon, it will take you to only those **Direct Reports** who have completed the task.



The screenshot shows the Wayne PDM Performance Management dashboard. At the top, there is a navigation bar with tabs for Home, My Performance, My Employees, Task Status, and Reports. Below the navigation bar, a welcome message reads: "Welcome super ADMIN. You are currently logged in as Alicia D Pendleton" with a Feedback icon. The main content area is titled "My Tasks (You have tasks to do)" and contains a table of tasks. The table has columns for Status and Task. The first task is "My Evaluation: Annual Review Planning - WSU Test 1 | Status" with a yellow dot icon. The second task is "Annual Review Planning - WSU Test 1 | Status" with a yellow dot icon. The third task is "Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals (1 To-Do)" with a yellow dot icon and a Quick Selector icon (a square with a right-pointing arrow). Annotations include a box labeled "1" pointing to the task title, a box labeled "2" pointing to the Quick Selector icon, and a blue arrow pointing from the text "Along with own tasks, you will now have a task to review the duties submitted." to the Quick Selector icon.

Status	Task
My Evaluation: Annual Review Planning - WSU Test 1   Status	Complete Job Duties, Tasks and Responsibilities/Goals
Annual Review Planning - WSU Test 1   Status	Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals (1 To-Do)

Legend:  Overdue  My To-Do  Sent for Review  Not Ready 

# Completing the Planning Annual Review Form: Supervisor's View

Using the **Quick Selector** shows who has completed the task.

The supervisor can open the form by clicking **Open Form**.

**Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals**

Page 1 of 1

Employee Name	Task
Jacob D Kinde	 <a href="#">Open Form</a>



# Review and Finalize Employees Submitted Job Duties....

The form that was  
completed by your **Direct  
Reports** is now open for  
you to make any necessary  
adjustments.

Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals Help | X


**Jacob D Kinde**

Annual Review Planning - WSU Test 1  
By Alicia D Pendleton

Form Navigator

- Planning Annual Review Form
- Employee Identification
- Accomplishments of Position Duties, Tasks and Responsibilities/Goals
- Development Plan

Save Send for Review... Complete



### Planning Annual Review Form

#### Employee Identification

Employee Name:  Banner ID#:

School/College/Division:  Job Title:

Department:

Review Period: From:  To:

#### Accomplishments of Position Duties, Tasks and Responsibilities/Goals

LIST DUTIES AND RESPONSIBILITIES IN ORDER OF PRIORITY. DOCUMENT EVALUATIONS BY PROVIDING COMMENTS ON PERFORMANCE WHICH BRIEFLY DESCRIBE THE ACCOMPLISHMENTS AND JUSTIFY THE LEVEL OF EVALUATION.

This list should not be considered a complete description of all employee's duties and responsibilities.

Comments should consist of a statement indicating results achieved; also may consist of comments indicating the employee's proficiency with job related skills

Indicate one of these ratings for each duty and responsibility:

Indicate one of these ratings for each duty and responsibility:

O=Outstanding E=Excellent FS=Fully Satisfactory LS=Less than Satisfactory U=Unsatisfactory



# Review and Finalize Employees Submitted Job Duties....

You can add or delete items or just make a few minor changes.

If there are substantial changes, we recommend you meet with the employee, before completing the document so any discussion that leads to adjustments can be captured. As once it is completed it cannot technically be changed.

Submitted Job Duties and Responsibilities/Goals Help | X

Save Send for Review... Complete

O=Outstanding E=Excellent FS=Fully Satisfactory LS=Less than Satisfactory U=Unsatisfactory

### Major Duties & Responsibilities (To be completed by employee)

**Title:** Implement the Automated Performance Management System by May 2013

- Develop the baseline Project plan by the end of January
- Establish the Implementation Team by the end of January
- Meet with Labor Relations and Union Leaders in February
- Complete the Administrators Overview Training in February
- Define Requirements in March

**Title:** Schedule all Director Appointments and Department Special Events

- Ensure there are no conflicts with Director appointments
- If any changes to Director appointments ensure notification within one hour of change
- Ensure there are no conflicts with conference rooms
- Ensure that all equipment is scheduled and set up

**Title:** Handle Department Budget

- Reconcile budget expenses against FMS reports on a monthly basis to ensure that all charges to department account are correct
- Resolve any incorrect charges with in 30 days of finding Incorrect charges
- Maintains spreadsheet of all monthly expenses so that year-end budget projects can be made so department ultimately stays within budget





# Review and Finalize Employees Submitted Job Duties....

The supervisor has the ability to send this form to a third party for input.

Click on the **Send for Review**.

The third party will not be able to make any changes but will be able to add any **Annotations** for the supervisor to make the changes.

Submitted Job Duties and Responsibilities/Goals Help

Save Send for Review... Complete

O=Outstanding E=Excellent FS=Fully Satisfactory LS=Less than Satisfactory U=Unsatisfactory

**Major Duties & Responsibilities (To be completed by employee)**

**Title:** Implement the Automated Performance Management System by May 2013

- Develop the baseline Project plan by the end of January
- Establish the Implementation Team by the end of January
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- Complete the Administrators Overview Training in February
- Define Requirements in March

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## Third Party Review

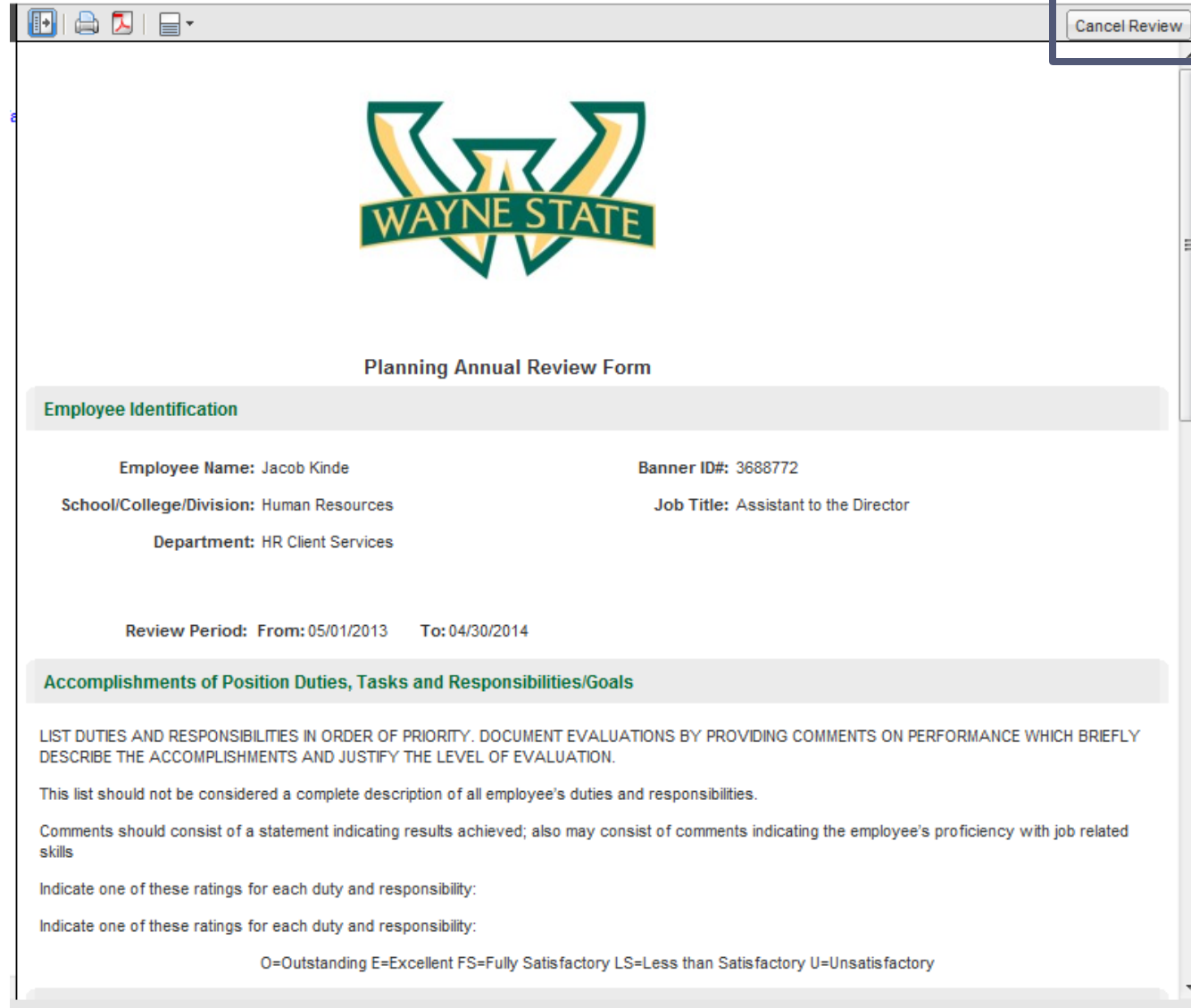
The supervisor can search by last name or first name for the third party person.

1. Type the **Last Name** or **First Name** into the space provided
2. Click **Search**
3. Click **Send**


The screenshot shows a 'Send for Review' dialog box. At the top, it says 'Select the employee to perform the review.' Below this is a 'Search' section with two input fields: 'Last Name:' and 'First Name:'. A blue box with the number '1' is positioned to the left of these fields, with a line pointing to the 'Last Name' field. To the right of the input fields is a 'Search' button. A blue box with the number '2' is positioned below the 'Search' button, with a line pointing to it. Below the search section is a large text area labeled 'Available Employees:' containing the text 'Enter search criteria and click Search (blank criteria return all results)'. Below this text area is a dropdown menu labeled 'Show additional information:' with '-Select-' as the current selection. At the bottom of the dialog box are two buttons: 'Send' and 'Cancel'. A blue box with the number '3' is positioned to the right of the 'Send' button, with a line pointing to it. Below the dialog box, a portion of a task card is visible. The task card has a title 'Handle Department Budget' and a description: 'Reconcile budget expenses against FMS reports on a monthly basis to ensure that all charges to correct'. Below the description are two bullet points: 'Resolve any incorrect charges within 30 days of finding incorrect charges' and 'Maintains spreadsheet of all monthly expenses so that year-end budget projects can be made so within budget'.

## Third Party Review

The supervisor has the ability to cancel the review. After the supervisor re-opens the form, just click **Cancel Review**.



Cancel Review



**Planning Annual Review Form**

**Employee Identification**

Employee Name: Jacob Kinde      Banner ID#: 3688772  
School/College/Division: Human Resources      Job Title: Assistant to the Director  
Department: HR Client Services

Review Period: From: 05/01/2013    To: 04/30/2014

**Accomplishments of Position Duties, Tasks and Responsibilities/Goals**

LIST DUTIES AND RESPONSIBILITIES IN ORDER OF PRIORITY. DOCUMENT EVALUATIONS BY PROVIDING COMMENTS ON PERFORMANCE WHICH BRIEFLY DESCRIBE THE ACCOMPLISHMENTS AND JUSTIFY THE LEVEL OF EVALUATION.

This list should not be considered a complete description of all employee's duties and responsibilities.

Comments should consist of a statement indicating results achieved; also may consist of comments indicating the employee's proficiency with job related skills

Indicate one of these ratings for each duty and responsibility:

Indicate one of these ratings for each duty and responsibility:

O=Outstanding E=Excellent FS=Fully Satisfactory LS=Less than Satisfactory U=Unsatisfactory

# Third Party Review

The third party review now has a new task to do that appears on his/her Home Page.

The screenshot shows a web application interface with a dark grey navigation bar at the top containing the following items: Home (highlighted in blue), My Performance, My Employees, Task Status, and Reports. Below the navigation bar, a welcome message reads: "Welcome super ADMIN. You are currently logged in as Lila Asante-Appiah" followed by a "Feedback" button with a speech bubble icon. The main content area is titled "My Tasks (You have tasks to do)" in a yellow header. Below this, there are two task entries, each with a yellow circular status indicator:

- My Evaluation: Annual Review Planning - WSU Test 1 | Status**
  - Complete Job Duties, Tasks and Responsibilities/Goals
- Annual Review Planning - WSU Test 1 | Status**
  - Please provide feedback on the Employee's Job Duties and Responsibilities (1 To-Do)

At the bottom of the task list, there is a legend with the following items: Overdue (red triangle), My To-Do (yellow circle), Sent for Review (blue clock), Not Ready (grey circle with slash), and a green checkmark icon.

## Useful Links

[WayneRite](#)

# Third Party Review

Third party reviewer cannot make any changes but can add **Annotations**.

Employee's Job Duties and Responsibilities Help | X

Communicate new system in May  
Train on New System in May

---

**Title:** Schedule all Director Appointments and Department Special Events  
Ensure there are no conflicts with Director appointments

If any changes to Director appointments ensure notification within one hour of change

Ensure there are no conflicts with conference rooms

Ensure that all equipment is scheduled and set up

---

**Title:** Handle Department Budget  
Reconcile budget expenses against FMS reports on a monthly basis to ensure that all charges to department account are correct

Resolve any incorrect charges within 30 days of finding incorrect charges

Maintains spreadsheet of all monthly expenses so that year-end budget projects can be made so department ultimately stays within budget

---

**Title:** Supervise Office Staff  
Supervise office staff on a daily basis to ensure work is completed accurately and on time and that the staff is customer-focused.

---

**Development Plan**

Identify and schedule appropriate classes and/or professional associations, conferences, on the job training, work experience and other developmental resources.

**Professional and Personal Development**

---

**Title:** Managing Workforce Generations: Working with the 21st-century Generation Mix  
[http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt\\_20\\_a02\\_bs\\_enu&fromShare=yes](http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt_20_a02_bs_enu&fromShare=yes)

---

**Title:**

---

**Title:**

---

**Title:**



## Third Party Review

Third party reviewer can type **Annotation** notes to give to the supervisor. Then the third party reviewer needs to click **OK**.

**Note:** When the form is totally completed, the notes will disappear for the employee.



**Annotation Details**

Section:

Previous Annotations:  
(Most Recent First)

New Annotation:

Entered By: super ADMIN as Lila Asante-Appiah

OK Cancel



# Third Party Review

The supervisor now gets the task back on the home page.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'My Performance', 'My Employees', 'Task Status', and 'Reports'. Below the navigation bar, a welcome message reads 'Welcome super ADMIN. You are currently logged in as Alicia D Pendleton' with a 'Feedback' button. The main content area is titled 'My Tasks (You have tasks to do)' and features a table with columns for 'Status' and 'Task'. The table lists two task categories: 'My Evaluation: Annual Review Planning - WSU Test 1' and 'Annual Review Planning - WSU Test 1'. Under the second category, a task 'Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals (1 To-Do)' is highlighted with a red box. A legend at the bottom identifies icons for 'Overdue' (red triangle), 'My To-Do' (yellow circle), 'Sent for Review' (blue clock), and 'Not Ready' (grey circle).

Status	Task
My Evaluation: Annual Review Planning - WSU Test 1	Complete Job Duties, Tasks and Responsibilities/Goals
Annual Review Planning - WSU Test 1	Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals (1 To-Do)

# Third Party Review

The supervisor can open the form again.

### Annual Review Planning - WSU Test 1

Tasks Overview

06/14/2013 06/14/2013 06/14/2013 06/14/2013

Employee Completes Job Duties, Task and Responsibilities/... Review and Finalize Employee's Submitted Job Duties and ... Additional Feedback on Employee Job Duties and Responsib... Employee Acknowledges Job Duties, Tasks and Responsibili...

1 To-Do

Search First and/or Last Name Search Show All

#### Appraisal Tasks

Page 1 of 1

<input type="checkbox"/>	First Name	Last Name	Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals	Appraisal Status	Modified
<input type="checkbox"/>	Ivonne	Allen	Alicia D Pendleton	<a href="#">View Status</a>	
<input type="checkbox"/>	Jacob D	Kinde	<a href="#">Open Form</a>	<a href="#">View Status</a>	06/05/2
<input type="checkbox"/>	Mary H	Earhart	Alicia D Pendleton	<a href="#">View Status</a>	
<input type="checkbox"/>	Mildred D	Fuller	Alicia D Pendleton	<a href="#">View Status</a>	
<input type="checkbox"/>	Roy R	Barnett	Alicia D Pendleton	<a href="#">View Status</a>	



# Third Party Review

The supervisor will now see “Annotations have been made on the form...”

The supervisor will need to find the **Annotation** with the exclamation point and read it.

The form will not let the supervisor complete the process until the **Annotation** has been opened.

Once the **Annotation** has been read, the supervisor can make the necessary adjustments.

Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals Help |


**Jacob D Kinde**

Annual Review Planning - WSU Test 1  
By Alicia D Pendleton

Form Navigator

- Planning Annual Review Form
- Employee Identification
- Accomplishments of Position Duties, Tasks and Responsibilities/Goals
- Development Plan

Annotation(s) have been made on this form. To review, click on the Review Annotation icon(s) below.



### Planning Annual Review Form

**Employee Identification**

Employee Name:	Jacob Kinde	Banner ID#:	3688772
School/College/Division:	Human Resources	Job Title:	Assistant to the Director
Department:	HR Client Services		

Review Period: From: 05/01/2013 To: 04/30/2014

**Accomplishments of Position Duties, Tasks and Responsibilities/Goals**

LIST DUTIES AND RESPONSIBILITIES IN ORDER OF PRIORITY. DOCUMENT EVALUATIONS BY PROVIDING COMMENTS ON PERFORMANCE WHICH BRIEFLY DESCRIBE THE ACCOMPLISHMENTS AND JUSTIFY THE LEVEL OF EVALUATION.

This list should not be considered a complete description of all employee's duties and responsibilities.

Comments should consist of a statement indicating results achieved; also may consist of comments indicating the employee's proficiency with job related skills

Indicate one of these ratings for each duty and responsibility:



# Complete Review and Finalize Employees Submitted Job Duties....

**Note:** You could send it to another person for review if needed.

Now you can click complete to send it back to the employee for his/her acknowledgement.

The screenshot shows a software interface for reviewing job duties. At the top right, there are three buttons: 'Save', 'Send for Review...', and 'Complete'. The 'Complete' button is highlighted with a blue box. Below the buttons, there is a form with the following content:

**Title:** Training on Method II Interviewing and Performanc Management which needs to take place twice a year.

Achieve an evaluation score of 4.0 out of 5 or higher. Ensure that the presentations are up to date with the current Wayne State Information

**Add New** ABC

**Development Plan**

Identify and schedule appropriate classes and/or professional associations, conferences, on the job training, work experience and other developmental resources.

**Professional and Personal Development**

**Title:** Managing Workforce Generations: Working with the 21st-century Generation Mix

[http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt\\_20\\_a02\\_bs\\_enu&fromShare=yes](http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt_20_a02_bs_enu&fromShare=yes)

**Title:**



# Ongoing Performance Tasks

The supervisor can review the appraisal at any time by going to **Task Status**.

Then finding the appropriate **Direct Report**.

Then clicking on **View Appraisal**.

## Annual Review Planning - WSU Test 1

Tasks Overview

06/14/2013	06/14/2013	06/14/2013	06/14/2013
Employee Completes Job Duties, Task and Responsibilities/...	<b>Review and Finalize Employee's Submitted Job Duties and ...</b>	Additional Feedback on Employee Job Duties and Responsib...	Employee Acknowledges Job Duties, Tasks and Responsibili...

4 Not Ready

Search First and/or Last Name

### Appraisal Tasks

Page 1 of 1

<input type="checkbox"/>	First Name	Last Name	Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals	Appraisal Status	Modified
<input type="checkbox"/>	Ivonne	Allen	Alicia D Pendleton	<a href="#">View Status</a>	
<input type="checkbox"/>	Jacob D	Kinde	<a href="#">View Appraisal</a>	<a href="#">View Status</a>	06/05/2
<input type="checkbox"/>	Mary H	Earhart	Alicia D Pendleton	<a href="#">View Status</a>	
<input type="checkbox"/>	Mildred D	Fuller	Alicia D Pendleton	<a href="#">View Status</a>	
<input type="checkbox"/>	Roy R	Barnett	Alicia D Pendleton	<a href="#">View Status</a>	

# Ongoing Performance Tasks

The supervisor can review a lot of information from the **My Employees** tab

Go to **My Employees**.

Find the appropriate **Direct Report**.

Look under **Evaluations** and click on the number where **Evaluation** and **Direct Report** intersect.

The list of past **Evaluations** completed come up. Click on the appropriate **Evaluation**.

**Note:** Bread Crumbs will show you where you are.

First Name	Last Name	Direct Manager	Relationships	Type	Profile (Modified)	Goals	Development Plans	Feedback	Evaluations	Documents
Albert J	Bowman	Brett C Green		Direct report	<a href="#">View</a>	0	0	0	0	0
Charlene M	Allemon	Brett C Green		Direct report	<a href="#">View</a>	4	3	0	2	0
Dawn M	Aziz	Lila Asante-Appian		Direct report	<a href="#">View</a>	0	0	0	0	0
Merlyn R	Merkison	Brett C Green		Direct report	<a href="#">View</a>	3	0	0	1	0
Michael R	Orlicki	Brett C Green		Direct report	<a href="#">View</a>	0	0	0	0	0
Sandra K	Guernsey	Brett C Green		Direct report	<a href="#">View</a>	5	2	1	1	0
Sophia L	Dollar	Brett C Green		Direct report	<a href="#">View</a>	5	3	0	1	0

**Note**

Home My Performance **My Employees** Task Status Reports

[My Employees](#) > [Charlene M Allemon](#)

Profile Duties, Responsibilities and Goals Development Plans Feedback **Evaluations**

Past Appraisals

Page 1 of 1

Past Appraisal Project

- Annual Review Planning - WSU Test 1
- Planning Annual Review - WSU Test**



# Review and Acknowledge Job Duties...

Now the employee has another task to do.

First task shows complete.

Employee needs to take one last look at the **Job Duties, Tasks and Responsibilities / Goals** and **Acknowledge** them.

Home My Performance

Welcome super ADMIN. You are currently logged in as Jacob D Kinde

**My Tasks (You have tasks to do)**

Status	Task
My Evaluation: Annual Review Planning - WSU Test 1   Status	
✓	<a href="#">Complete Job Duties, Tasks and Responsibilities/Goals</a>
●	<a href="#">Review and Acknowledge Job Duties, Tasks and Responsibilities/Goals</a>




# Review and Acknowledge Job Duties...

Once the employee clicks on the link the form is opened. And the employee can review it....

es, Tasks and Responsibilities/Goals Help | X

---

Review/Acknowledge



### Planning Annual Review Form

**Employee Identification**

Employee Name: Jacob Kinde	Banner ID#: 3688772
School/College/Division: Human Resources	Job Title: Assistant to the Director
Department: HR Client Services	

Review Period: From: 05/01/2013 To: 04/30/2014

**Accomplishments of Position Duties, Tasks and Responsibilities/Goals**

LIST DUTIES AND RESPONSIBILITIES IN ORDER OF PRIORITY. DOCUMENT EVALUATIONS BY PROVIDING COMMENTS ON PERFORMANCE WHICH BRIEFLY DESCRIBE THE ACCOMPLISHMENTS AND JUSTIFY THE LEVEL OF EVALUATION.


This list should not be considered a complete description of all employee's duties and responsibilities.

Comments should consist of a statement indicating results achieved; also may consist of comments indicating the employee's proficiency with job related skills

Indicate one of these ratings for each duty and responsibility:

Indicate one of these ratings for each duty and responsibility:

O=Outstanding E=Excellent FS=Fully Satisfactory LS=Less than Satisfactory U=Unsatisfactory



# Review and Acknowledge Job Duties...

The employees clicks on the **Review / Acknowledge** button and then clicks **OK**, which now closes the planning process and turns the form into a PDF that can be viewed at any time. On the PDF you can see the sign off.

Now all the tasks and development items will appear on the employee's **My Performance**.

es, Tasks and Responsibilities/Goals Help | X

Review/Acknowledge

Ensure there are no conflicts with Director appointments

If any changes to Director appointments ensure notification within one hour of change

Ensure there are no conflicts with conference rooms

Ensure that all equipment is scheduled and set up

---

**Title:** Handle Department Budget  
Reconcile budget expenses against FMS reports on a monthly basis to ensure that all charges to department account are correct

Resolve any incorrect charges with in 30 days of finding Incorrect charges

Maintains spreadsheet of all monthly expenses so that year-end budget projects can be made so department ultimately stays within budget

---

**Title:** Supervise Office Staff  
Supervise office staff on a daily basis to ensure work is completed accurately and on time and that the staff is customer-focused.

---

**Title:** Training on Method II Interviewing and Performance Management which needs to take place twice a year  
Achieve an evaluation score of 4.0 out of 5 or higher. Ensure that the presentations are up to date with the current Wayne State Information

**Development Plan**

Identify and schedule appropriate classes and/or professional associations, conferences, on the job training, work experience and other developmental resources.

**Professional and Personal Development**

**Title:** Managing Workforce Generations: Working with the 21st-century Generation Mix  
[http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt\\_20\\_a02\\_bs\\_enus&fromShare=yes](http://waynestateuniversity.skillport.com/skillportfe/assetSummaryPage.action?assetid=mgmt_20_a02_bs_enus&fromShare=yes)

**Employee:** super ADMIN as Jacob D Kinde J.K. (electronic signature for the evaluation of Jacob D Kinde)

**Date:** 06/10/2013 04:00 PM



# Ongoing Performance Tasks

The list of **Duties, Task, Responsibilities / Goals** will appear in the tab of **Duties, Responsibilities and Goals** in **My Performance**.

The screenshot displays a web interface for 'My Performance'. At the top, there are navigation tabs: 'Home' and 'My Performance'. Below this, a sub-section titled 'My Performance' contains several tabs: 'Profile', 'Duties, Responsibilities and Goals' (which is selected), 'Development Plans', 'Feedback', 'Evaluations', and 'Document'. The main content area is titled 'Duties, Responsibilities and Goals' and includes a table with the following data:

<input type="checkbox"/>	<input type="checkbox"/>	Progress Flag	Linked	Employee Goal ^	% Complete
<input type="checkbox"/>	<input type="checkbox"/>	⊘		Handle Department Budget	0%
<input type="checkbox"/>	<input type="checkbox"/>	⊘		Implement the Automated Performance Management System by May 2013	0%
<input type="checkbox"/>	<input type="checkbox"/>	⊘		Schedule all Director Appointments and Department Special Events	0%
<input type="checkbox"/>	<input type="checkbox"/>	⊘		Supervise Office Staff	0%
<input type="checkbox"/>	<input type="checkbox"/>	⊘		Training on Method II Interviewing and Performance Management which needs to take place twice a year	0%



# Ongoing Performance Tasks

If the employee clicks the plus sign next to the **Duty, Responsibility and Goal** (this was the **Title**)...it shows the **Details / Description** from the form. At this point the employee can add **Notes** and update the **Status** of the **Duties, Responsibilities and Goals**, by clicking on the **Title**.

Then click on **Add Notes**. Type in the note and then click **Save**.

The supervisor can also add **Notes** at any time and view the **Status** updates of the employee if they are made.

The screenshot shows a web application interface for 'My Performance'. The top navigation bar includes 'Home' and 'My Performance'. Below this, there are tabs for 'Profile', 'Duties, Responsibilities and Goals', 'Development Plans', 'Feedback', 'Evaluations', and 'Documents'. The 'Duties, Responsibilities and Goals' tab is active. The main content area displays a table with columns for 'Progress Flag', 'Linked', 'Employee Goal', and '% Complete'. The first row is highlighted, showing a goal titled 'Handle Department Budget' with a progress of 0%. A blue arrow points from the text on the left to the plus sign next to this goal. A 'Goal Details' panel is open for this goal, showing its description: 'Reconcile budget expenses against FMS reports. Resolve any incorrect charges within 30 days of finding incorrect charges. Maintains spreadsheet of all monthly expenses so that year-end budget stays with budget.' Below the table, there is an 'Add Notes' dialog box with a 'Previous Notes' section (empty), a 'New Notes' text area, and an 'Entered By' field containing 'Brett C Green'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

## Ongoing Performance Tasks

As stated, the supervisor can add a **Note** right to the **Duties, Responsibilities and Goals** as well.

Go to **My Employees**. Find the appropriate **Direct Report** and then look under **Goals**. Click the number where the two intersect. Then proceed just as the employee did in the previous slide.

**Note:** For notes added directly to the **Duties, Responsibilities and Goals**, your employee will be able to see it. Also, the supervisor will be able to see any **Notes** the employee added.

Home My Performance My Employees

My Employees Feedback

Search First and/or Last Name

Employees

Page 1 of 1

Displaying 1 - 7

First Name	Last Name	Goals	Development Plans	Feedback	Evaluations	Documents
Albert J	Bowman	0	0	0	0	0
Charlene M	Allemon	8	3	0	3	0
Dawn M	Aziz	0	0	0	0	0
Merilyn R	Merkison	3	0	0	1	0
Michael R	Orlicki	0	0	0	0	0
Sandra K	Guernsey	5	2	1	1	0
Sophia L	Dollar	5	3	0	1	0



# Ongoing Performance Tasks

The supervisor or the employee can put in a **Start Date** on a goal, if desired, as well as add a **Due Date**, and/or select a **Status**.

**Goal Details**

Employee: **Charlene M Allemon** Weight:

Title:

Description:

Process: LEADS Performance Planning - WSU Test 2  
 Allow Editing

Start Date:  Due Date:  Completed Date:

Percent Complete:  Status:   
Cancelled  
Completed  
In Progress  
Not Started  
On Hold

Last Modified:  Created Date: 08/05/2013

Progress Flag  
  On Track   At Risk  
  Not on Track   No Flag Set



# Ongoing Performance Tasks

The supervisor or the employee can put in **Percent Complete** and even mark a **Progress Flag**.

To save changes, just click **OK**.

**Note:** The most recent note will always appear on the top.

### Goal Details

Employee: **Charlene M Allemon** Weight:

Title:

Description:

---

Process: LEADS Performance Planning - WSU Test 2  
 Allow Editing

---

Start Date:   Due Date:   Completed Date:

---

Status:

Progress Flag

<input type="radio"/> <input checked="" type="radio"/>	On Track	<input type="radio"/> <input checked="" type="radio"/>	At Risk
<input type="radio"/> <input checked="" type="radio"/>	Not on Track	<input type="radio"/> <input checked="" type="radio"/>	No Flag Set

---

Last Modified: 08/05/2013  
Created Date: 08/05/2013



# Ongoing Performance Tasks

Here is sample of where notes can be seen under the Duties, Responsibilities and Goals.

The screenshot shows a web interface for managing employee performance. The main navigation bar includes 'Home', 'My Performance', 'My Employees', 'Task Status', and 'Reports'. The current page is 'My Employees > Jacob D Kinde', with sub-tabs for 'Profile', 'Duties, Responsibilities and Goals', 'Development Plans', 'Feedback', 'Evaluations', 'Documents', and 'Secondary Managers'. The 'Duties, Responsibilities and Goals' section displays a table with columns for 'Progress Flag', 'Linked', 'Employee Goal', '% Complete', 'Weight', and 'Entered'. The first goal, 'Handle Department Budget', is highlighted and has a box containing the following notes:

**Notes:**  
[super ADMIN as Alicia D Pendleton-06/10/2013] Don't forget that if you want to work to have some budget left over to order a conference table.  
[super ADMIN as Jacob D Kinde-06/10/2013] I have found two mis-charged items in the month of July and corrected them with one week.

Progress Flag	Linked	Employee Goal	% Complete	Weight	Entered
<input type="checkbox"/>	<input type="checkbox"/>	Handle Department Budget Description: Reconcile budget expenses against FMS reports on a monthly basis to ensure that all charges to department account are correct Resolve any incorrect charges with in 30 days of finding Incorrect charges Maintains spreadsheet of all monthly expenses so that year-end budget projects can be made so department ultimately stays within budget Notes: [super ADMIN as Alicia D Pendleton-06/10/2013] Don't forget that if you want to work to have some budget left over to order a conference table. [super ADMIN as Jacob D Kinde-06/10/2013] I have found two mis-charged items in the month of July and corrected them with one week.	0%	0	Alicia D
<input type="checkbox"/>	<input type="checkbox"/>	Implement the Automated Performance Management System by May 2013	0%	0	Alicia D
<input type="checkbox"/>	<input type="checkbox"/>	Schedule all Director Appointments and Department Special Events	0%	0	Alicia D
<input type="checkbox"/>	<input type="checkbox"/>	Supervise Office Staff	0%	0	Alicia D
<input type="checkbox"/>	<input type="checkbox"/>	Training on Method II Interviewing and Performance Management which needs to take place twice a year	0%	0	Alicia D

Legend: ● On Track ▲ At Risk ● Not on Track ○ No Flag Set 🔗 Linked to Organization



# Ongoing Performance Tasks

The supervisor can also add **Manager Notes** by clicking on the **Feedback Tab** under **My Performance** and then clicking **Add** and then click on **Manager Note**.

Or the supervisor can go through **My Employees** and then clicking the number under **Feedback** for the appropriate **Direct Report** and then clicking **Add**.

Wayne Performance Management

Home My Performance My Employees Task Status Reports

My Performance

Profile Duties, Responsibilities and Goals Development Plans Feedback Evaluations Documents

Feedback

Page 1 of 1

Note Sharing Entered By

Manager Note

First Name	Last Name	Goals	Development Plans	Feedback	Evaluations	Document
Albert J	Bowman	0	0	0	0	0
Charlene M	Allemon	8	3	0	3	0
Dawn M	Aziz	0	0	0	0	0
Marilyn R		2	0	0	1	0
Michael R						0
Sandra K						0
Sophia L						0

Add Feedback - Manager Note

For: Charlene M Allemon

Find Recipients Suggestions: Direct Reports

Title: Manager Note

**B I U** [List Icons] [ABC]

Share feedback with employee.

Last Modified:

OK Cancel



# Ongoing Performance Tasks

If the supervisor just went generally to **My Performance** and then the **Feedback Tab**, the supervisor can choose to whom the note applies, by clicking **Direct Reports**. It will list the supervisor's **Direct Reports** to apply the **Note**. The supervisor can use the **X** to remove any **Direct Report** it does not apply to. Otherwise, if they went through **My Employees**, the **Direct Report's** name will already be there.

The supervisor can decide to share the **Note** with the employee (which will appear under the employee's **Feedback Tab**) or not share it and just use it as documentation for later.

To save the note, just click **OK**.

Add Feedback - Manager Note

For: Charlene M Allema X

Find Recipients

Suggestions: Direct Reports

Title: Manager Note

**B I U** [List Icons] [Image Icon] [ABC]

Share feedback with employee.

Last Modified:

OK Cancel



# Other “My Performance” Tabs

The **Development Plans** tab works the same way as the Duties, Responsibilities and Goals.

The **Feedback** tab will show any Feedback the supervisor has submitted for the employee to view.

The **Evaluations** tab will show any of the forms that have been completed.

The **Documents Tab** allows employees to attach documents relevant to his/her performance.

The screenshot shows a web application interface for 'My Performance'. At the top, there are navigation tabs: 'Home' and 'My Performance' (which is selected and highlighted in blue). Below this, there is a sub-navigation bar with five tabs: 'Profile', 'Duties, Responsibilities and Goals', 'Development Plans' (highlighted in blue), 'Feedback', 'Evaluations', and 'Documents'. Below the sub-navigation bar, there is a text instruction: 'Use this section to view and manage your personal development plans.' Below this, there is a section titled 'Development Plans'. This section contains a table with the following structure:

	Development Plan	Competency	Status
	Managing Workforce Generations: Working with the 21st-century Generation Mix		Not Started



# Task Status and Assign to Other Manager

The supervisor can get an at-a-glance view of task statuses for each employee by clicking on **Task Status**. If the supervisor is involved with more than one process, the supervisor can select which process to view by clicking on the down arrow next to the **Viewing** box. Only those employees in that particular process will show.

The supervisor also has the ability to assign an employee to another manager to handle that particular process by clicking in the box next to the employee and then clicking **Assign to Other Manager**.

Home My Performance My Employees **Task Status** Reports

Annual Review Planning - WSU Test 1

Viewing: Annual Review Planning - WSU Test 1

Tasks Overview

Direct Reports

Search First and/or Last Name Search Show All

Appraisal Process Overview

Page 1 of 1

Assign to Other Manager...

First Name	Last Name	Direct Reports	Employee Completes Job Duties, Task and Responsibilities/Goals	Review and Finalize Employee's Submitted Job Duties and Responsibilities/Goals	Additional Feedback on Employee Job Duties and Responsibilities
Ivonne	Allen		My To-Do Ivonne Allen	Not Ready Alicia D Pendleton	N/A
Jacob D	Kinde		Completed View Self-Appraisal	Completed View Appraisal	Completed Lila Asante-Appiah
Mary H	Earhart		My To-Do Mary H Earhart	Not Ready Alicia D Pendleton	N/A
Mildred D	Fuller		My To-Do Mildred D Fuller	Not Ready Alicia D Pendleton	N/A
Roy R	Barnett		My To-Do Roy R Barnett	Not Ready Alicia D Pendleton	N/A

Legend: Overdue My To-Do Their To-Do Sent for Review Not Ready Completed



# Summary

Now you know how to:

- ▶ Log in to WaynePM and Identify items on the Home Page
- ▶ Navigate WaynePM, identify icons, and personalize your view of the system
- ▶ Use WaynePM to handle common system tasks
- ▶ Use WaynePM to handle annual review planning tasks
- ▶ Use WaynePM for ongoing performance tasks

