Online Performance Management Process

Department Head Instructions

Please follow these steps to complete and track performance evaluations. Do not hesitate to contact the Office of Human Resources at x2372 with any questions you may have.

As part of the Performance Management Process (PMP), you will be required to complete a Performance Evaluation Form for each of your direct reports, and to review each Performance Evaluation Form completed for each Employee who reports to one of your direct reports.

Department Heads should encourage their Supervisors and staff to complete the Self-Evaluation and make sure they know how to access the form. Completing the Self-Evaluation form is voluntary. However, depending on the job duties or level of responsibility, you may ask your direct reports to complete the form or to prepare a summary.

Please review the Supervisor Instructions to guide you through the process you will follow in evaluating your direct reports. Because of your role as a Department Head, evaluations of your direct reports will be sent to your Senior Manager for review and approval.

1. To start the process, please use the following link: https://opm.amherst.edu to view the list of individuals for whom you need to review or approve an evaluation. You must use a browser such as Firefox or Google Chrome, not Internet Explorer, when using this link.

   a. You will login to the online PMP by using your Amherst username and password (just as you login to your computer each day).

2. When the page opens, you will see a full list of those requiring an evaluation, including your direct reports and those who report to any of your direct reports. The list displays the status of each evaluation, and what action is permitted (two right hand columns).

   a. If the list of names is not accurate, please contact Scott Kinney at x5719, skinney@amherst.edu, and we will make adjustments as needed. Changes will be reflected on the next day.

   b. Three toggle buttons are displayed: “Show all staff”, “Show only direct reports”; and “Show all evaluations that need to be reviewed/approved”. You may use these buttons to refine the group you want to view.

   c. If you are a Supervisor and have a direct report who is also a Supervisor, the “Show only direct reports” button will not refine the list to only show direct your reports. Please be sure to complete an initial evaluation only for those reporting directly to you.
d. The status column will list these options, depending on where the evaluation is in the PMP flow.

- Not created
- Draft
- Supervisor Submitted
- Department Head Reviewed
- Senior Managed Reviewed
- Human Resources Reviewed
- Viewable by Employee
- Employee Acknowledged
- Department Head Approved
- Senior Manager Approved
- Human Resources Approved
- Complete

 e. The action column displays two options, “Edit” and “View”. When displaying “Edit” you may modify the evaluation, or take action when necessary. “View” allows you to read what the evaluation contains at any given point in time.

**Important Note:** We encourage you to review the status column every day. You can use the “Sort buttons” in the dashboard to check the status of each Employee’s evaluation. If you click the “Show all evaluations that need to be reviewed/approved” button, you can see all the evaluations that you need to take action on.

3. You will be required to take action on those with a status of “Supervisor Submitted” or “Employee Acknowledged”. To review an evaluation click “Edit” or “View” (depending on the status of the evaluation), and a copy of the evaluation will be displayed. Be sure to review the appropriate sections in the purple bar under the heading “Performance Factors”, particularly the “Overall rating/Summary comments” section.

4. You have two options listed in the “Approvals and Comments” section.

a. If you are in agreement with the evaluation, and don’t have any suggested changes, check the button indicating “No changes requested”. You may add comments if you wish. Selecting this option and clicking SUBMIT sends the evaluation to your Senior Manager for review.

b. If you want to have changes made, check the “Send back to Supervisor” button. You must provide your feedback in the “Comments” box. Please note, the comments will not appear in the Employee’s evaluation, but will be viewable when clicking the “Audit Workflow” button at the end of the evaluation. Once revised by the Supervisor, you will again receive the evaluation for review. When approved by you, the evaluation will be forwarded to your Senior Manager.

   ➤ Once forwarded to your Senior Manager, the status of this person is displayed as “Department Manager Reviewed”.

5. Your Senior Manager will then review the evaluation and, if in agreement, send it to Human Resources for review; or return to you, or the Supervisor, for modifications. Once reviewed by Human Resources, assuming no modifications are required, the evaluation status will be changed to “Human Resources Reviewed”. If modifications are required, the evaluation will be returned for revisions and the status changed accordingly.

6. Once reviewed by Human Resources the status will be displayed as “Human Resources Reviewed” and no modifications to the evaluation may be made. The status of the evaluation may be tracked on the dashboard shown on the top of the screen.

a. Only when the status reads “Human Resources Reviewed” may the Supervisor meet with the Employee to discuss the evaluation.

7. When the status reads “Human Resources Reviewed”, the Supervisor should contact the Employee to schedule a meeting.

8. The Supervisor should make the evaluation available and conduct the performance dialogue.

9. During, or following the meeting, the Employee will be asked to access the online evaluation, enter comments, if any, and acknowledge the evaluation by clicking SUBMIT.

   a. Once this occurs, the evaluation will be forwarded to you. The status for this evaluation will change to “Employee Acknowledged”. To take action on the evaluation click “Edit” and the evaluation will be displayed. Review the evaluation, check the box “Department Head Approved”, and insert any desired comments, if any, into the “Comment” box. These become a part of the evaluation. Click the SUBMIT button. The status of the evaluation will now read “Department Head Approved”.

   b. If the Employee comments warrant a discussion with the Employee and/or the Supervisor, you should meet with them prior to approving the evaluation. These comments will appear in the final copy made available to the Employee.

   c. Once approved by you, the evaluation will be forwarded to your Senior Manager, and then to Human Resources for approval. The status will change to “Senior Manager Approved” and “Complete” when approved by the appropriate person. You may be contacted if any issues need to be discussed.

10. Once approved by the Chief Human Resources Officer, the evaluation process for that Employee is complete and the status will be noted as “Complete”. Employees, Supervisors, Department Heads and Senior Managers may view a copy of the completed evaluation. A PDF copy may be printed if desired.

11. This process must be followed for your direct reports, and for those who report to your direct reports.

12. At the start of each day you will receive an email outlining the number of evaluations on which you need to take action. However, as noted previously, we recommend you open the dashboard periodically and check the “Show all the evaluations that need to be reviewed/approved” button. This will quickly identify actions you need to take. Clicking “Show all staff” will identify which evaluations need to be initiated by Supervisors, and where in the workflow each evaluation resides.