Amherst College
Office of Human Resources

Online Performance Management Process

Senior Manager 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 and approve each Performance Evaluation Form completed for each Employee within your division.

Senior Managers, Department Heads and Supervisors should encourage their 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 and Department Head Instructions to guide you through the process you will follow, and to inform you on the process you should follow for your direct reports. Because of your role as a Senior Manager, evaluations of your direct reports will be sent to Human Resources for review and approval (other steps do not apply).

1. To start the process, please use the following link: https://opm.amherst.edu to view the list of individuals 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 employees in your division requiring an evaluation. 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. 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

d. 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 **"Department Head Reviewed"** or **"Department Head Approved"**, and when the evaluation is for one of your direct reports **"Employee Acknowledged"**. To review an evaluation, under the **"Action"** column 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 Human Resources for review. The status will change to **"Senior Manager Reviewed".**

   b. If you want to have changes made, check the **"Send back to Supervisor"** or **"Send back to Department Head"** 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. When you have entered your comments click **SUBMIT** at the bottom of the page. The status will now change to reflect the person to whom you have returned the evaluation.

      ➔ Once revised by the Supervisor, and or Department Head, you will again receive the evaluation for review. When approved by you, the evaluation will be forwarded to Human Resources. The status for this evaluation will now be displayed as **"Senior Manager Reviewed".**

5. Human Resources will then review the evaluation and, if in agreement, make it available to the Supervisor for review with the Employee, or return to you if modifications are required. 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 to you, your Department Head, or Supervisor for revisions, and the status will be changed accordingly. Once the changes have been made, you will again need to indicate your approval and the evaluation will be sent to Human Resources.

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 status of the evaluation will change to "Employee Acknowledged". The evaluation will then be forwarded to the Department Head, or you, as applicable. When you receive the document, review the evaluation, particularly any comments made by the Department Head. These comments become a part of the evaluation. If you do not have any questions and are in agreement with the evaluation, in the **"Approvals and Comments"** section, check the box **"Senior Manager Approved"** and then **SUBMIT**. Once approved by you, the evaluation will be forwarded to the Chief Human Resources Officer for approval. You may be contacted if any issues need to be discussed.

   b. The system does allow you to approve evaluations from the dashboard. Under the heading **"Review/Approve"**, you will note a box when the evaluation is ready for your action. You may check the box for one or more evaluations, after reading them, and then **"Approve"** at the bottom of the page. This sends the reviews to Human Resources, and the status will be updated to **"Senior Manager Approved"**. You should use this option only if you are confident there are no issues that need addressing.

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.