

Year End Appraisal -Guide for Supervisors

STEP 1 – Log In to Delta’s Performance Management Module

- Go to [PeopleAdmin](#) and log in with your Delta login credentials. Click Login.
- Select the three blue dots in the upper left-hand corner of the page to expand the menu.
- Click the Employee Portal link. This takes you to the “main page” for Performance Management. Your employee(s) will appear under your Action Items.

STEP 2 - Begin the appraisal process by creating a Plan

- Select an employee’s name from your action items. Once you click on your employee, a navigation menu will appear on the left, which includes an Overview, Plan and Supervisor Evaluation. Use these links to move back and forth as needed.
- Each appraisal form will open up into the “Plan”
 - There are two (2) tab sections across the top of the plan. The first tab is titled “Current Year Employee Action Plans and Professional Development Objectives.”
 - The Current Action Plans and Professional Development Objectives will reflect what was entered on the employee’s year end appraisal last year. *If you are completing an appraisal for a new employee who did not have an appraisal completed during the last year end you can enter the plans you have established for the new hire. If no plans were established due to the timing of the new hire please enter a comment indicating this in the fields.*
 - The second tab is titled “Appraisal Factors”; no action is required on this tab. Scroll to the bottom of the page and select "Complete."
 - Select “OK” on the pop up window to confirm that you have completed the Plan.
 - If you fail to complete any of the required sections, you will see a red prompt at the top of your screen and the plan will remain in draft mode. The message will give a general indication as to why the process was unable to be completed. Correct these errors and click the ‘Complete’ button again to finish this task.
 - When the plan is created successfully, you will see a green prompt at the top of your screen.

STEP 3 - Supervisor creates year end appraisal

- To complete an employee appraisal, select ‘Supervisor Evaluation’ link in the left navigation area
 - OR if you’re just signing back into the system you’ll be on the ‘Home’ tab, where you can then click the employee’s appraisal (description: ‘Supervisor completes year end appraisal’) link from your actions items
- Once selected, the Supervisor Evaluation will appear. There are five (5) tab sections across the top of the Supervisor Evaluation.
 - Complete each tab. When you reach the bottom of each page and have completed the required fields you may click the ‘Save Draft’ or ‘Next’. Choosing the ‘Save Draft’ button will allow you to come back and complete the evaluation at a later point in time. Choosing ‘Next’ will move you forward to the next tab.
 - Note: the supervisor must complete all fields and tabs before the process can be marked as complete. Once you have completed the appraisal, click ‘Complete’ at the bottom of the page.
 - When you select ‘Complete’, select “OK” on the pop-up window to confirm all necessary information has been entered/completed. Be sure all information is entered correctly before

you select OK, as you cannot go back and edit. (If you submit in error, you will need to contact HR to re-open the task for you.)

- After you have completed the appraisal and have clicked 'OK' you will see a green prompt at the top of your screen indicating that your evaluation has been marked as complete.
- The appraisal is immediately routed to the second level supervisor for approval.
- Click the 'Home' tab to return to Your Action Items to choose another employee appraisal to begin or logout.
- Once all employee appraisals are complete, communicate with next level supervisor(s) so they are aware they can begin the second level approval process.

STEP 4: Second level supervisor approves appraisal & HR releases appraisals back to supervisors

- The second level supervisor will complete his/her review of the Supervisor Ratings and Comments, and mark this process step as 'Approved.'
- HR will complete their audit of the appraisal results and email supervisors that appraisals are accessible.

STEP 5: Schedule / conduct the employee appraisal meeting

- Once Human Resources sends out an email alerting supervisors that appraisals are accessible, you can begin meeting with your employee(s) to review their appraisal.
- Meet with employee(s)
 - It is helpful to print a copy to share with your employee or to pull up the document on your computer during the meeting.
 - To view appraisal: go to the home area and click the employee name (description will state 'Supervisor acknowledges year end appraisal meeting has taken place'), this will open up the Supervisor Evaluation to view
 - To print: click the blue 'Action' button at the top right of your screen (when you're in the employee's appraisal)

STEP 6: Supervisor acknowledges year end appraisal meeting has taken place (Complete this task during meeting or immediately following so employee can return to their desk and complete their sign off.)

- Once the meeting has taken place, the supervisor needs to acknowledge the year end appraisal meeting has taken place in order for the appraisal to be routed to the employee.
- Click the employee name (description will state 'Supervisor acknowledges year end appraisal meeting has taken place'), this will open up the Supervisor Evaluation to view and acknowledge you have met with the employee.
- Scroll to the bottom of the page and click the 'Acknowledge' button.
- The system will ask you if you are sure you want to complete the action requested. Click 'OK.'
 - If you complete this action before you have the Appraisal Meeting, the action can only be re-opened by contacting HR. Choosing "ok" will move the appraisal to the employee for acknowledgement.
 - Please communicate with employee to log into the portal to complete their acknowledgment.
- You will be sent back to the Employee Task Overview page and a blue prompt will appear that shows your acknowledgement was recorded.
- You can now click the Home Tab to return to the main screen to select another appraisal to review/approve OR click 'Log out' at the top right of the screen if complete.

STEP 7: Employee acknowledgement of appraisal

- Once the supervisor acknowledges that the appraisal has been discussed with the employee an action will appear on the employee's Action Items requiring their acknowledgement.

To view your employees' prior year appraisals choose the "My Employees' Reviews" link from your home page, then select "Closed" from the drop down box of the "Program Status" button located on the far right of your screen.

Please contact the Human Resources Office at (989)686-9107 if you are missing an employee or see an employee that no longer reports to you and/or have questions regarding this process