



**Performance Evaluation
System (PES)
Step-by-Step Tutorials**

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Training Guide

Step-by-Step Tutorials

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Performance Evaluation System (PES)

How to Access PES

Step 1

Navigate to the PeopleAdmin website and login with your LSUHSC credentials:

<https://lsuhsc.peopleadmin.com/hr/sessions/new>

Step 2

From the PeopleAdmin Landing Page, click on the module indicator as shown below.

Module Indicators

The screenshot shows the PeopleAdmin interface. At the top, there's a navigation bar with 'Applicant Tracking System', 'Welcome, Supervisor', 'My Profile', 'Help', and 'Logout'. Below that is the 'LSU Health NEW ORLEANS' logo and a 'User Group' dropdown menu set to 'Employee'. A 'Shortcuts' dropdown is also visible. The main content area has tabs for 'Postings', 'Users', 'Hiring Proposals', 'Position Requests', and 'Special Handling Lists'. A donut chart on the right shows '9 Filled Postings Last 30 days' with a legend for 'Unclassified Staff & Administrative Faculty', 'Classified', and 'Faculty'. A side menu on the left lists 'Applicant Tracking System', 'Position Management', and 'Employee Records'. Under 'OTHER TOOLS', 'Performance Management Program (PMP)/Performance Evaluation System (PES)' is highlighted with a red arrow. Another red arrow points to the text 'Select to access the Performance Evaluation System' next to the highlighted item.

Step 3

From the side menu, under Other Tools, select **Performance Management Program (PMP)/Performance Evaluation System (PES)** as shown in the above screen capture.

Performance Evaluation

How to Submit a Supervisor Evaluation

Step 1

From the PeopleAdmin Landing Page, click on the module indicator as shown below.

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Module Indicators



Select to access the Performance Evaluation System

Step 2

From the side menu, under Other Tools, select **Performance Management Program (PMP)/Performance Evaluation System (PES)** as shown in the above screen capture.

Step 3

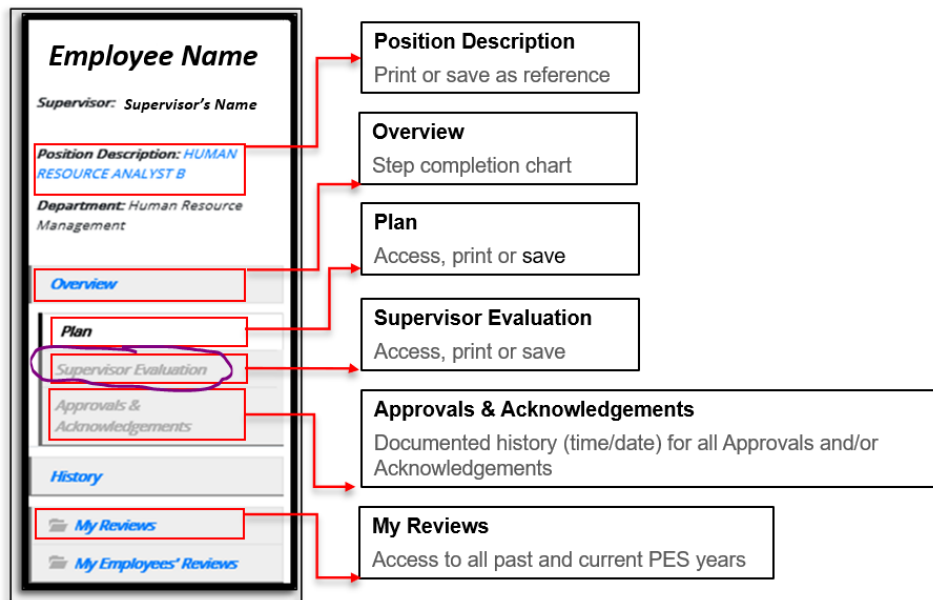
A list of PES Evaluations will be displayed under Your Action Items. Select the PES Evaluation for the employee you are evaluating as shown below.

PES Landing Page

Item	Description	Due Date	Status
LSUHC Annual Evaluation-Supervisor for Employee Name	Employee Acknowledges Evaluation	n/a	Available
PES Evaluation for Employee Name	PES Plan Review	n/a	Available

Step 4

From the Navigation Menu, click **Supervisor Evaluation** as shown below.



Step 5

Access the employee's progress notes before completing the performance evaluation. Select **Progress Notes** from the top menu as shown below. Ensure that documentation is uploaded to support ratings of *Exceptional* or *Needs Improvement*.



Step 6

Complete Section 1: Mission Statement as shown below. Click **Save & Continue**
The evaluation period beginning date should show as July 1st of prior year OR the employee's date of hire. The evaluation end date should show as June 30th of current year.

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1

Mission Statement

Section 1: Mission Statement

LSUHSC's mission statement and the established evaluations period are displayed.

“Louisiana State University Health Sciences Center in New Orleans Mission (LSUHSC-NO) is to provide education, research, and public service through direct patient care and community outreach”

Evaluation Period	
* Beginning Date	
	2019-07-01
* End Date	
	2020-06-30
<i>This date is always going to be June 30th, please enter that date.</i>	

Step 7

Complete Section 2: Work and Behavior Expectations. Once you have reviewed the expectations set during the planning period, click **Save & Continue**.

2

Work and Behavior Expectations

Section 2: Work and Behavior Expectations

Displays the expectations set during the planning period.

Use this section to refresh yourself on the established expectations when determining the employee's performance rating.

Work Expectations (at least one each) Description	Performs all assignments as a Maintenance Repairer 2, including but not limited to assembling, installing, replacing, repairing, and maintaining structures, equipment, fixtures, accessories and furniture across all maintenance trades, to produce quality results in a timely manner in accordance with instructions given by respective supervision and as outlined in the approved Position Description. Complete assignments by set date and time. Show commitment to making sure completed work is to the best of his/her ability and skill every time. Recognize when to make a decision independently and when to consult the supervisor or other staff. Annual leave and other special absences are consistently scheduled in advance and are never taken without prior permission. Use work time effectively (e.g. avoid excessive talking, personal phone calls). Arrive at work station ready to begin work at the scheduled time.
Behavior Expectations (at least one each) Description	Annual leave and other special absences are consistently scheduled in advance and are never taken without prior permission. Treat staff in other departments and the general public with respect and courtesy. Effectively communicate information verbally and in writing. Use work time effectively (e.g. avoid excessive talking, personal phone calls). Arrive at work station ready to begin work at the scheduled time.

Step 8

Complete Section 3: Overall Results. From the drop-down menu, select the appropriate rating. Click **Save & Continue**. *Note that ratings of Exceptional or Needs Improvement require supportive evidence as justification. Supporting documentation should be uploaded in the Progress Notes throughout the evaluation period.*

3
Overall Results (PES Evaluation Form)

Overall Results

Exceptional: Work and behavior consistently exceeded the performance criteria.

Successful: Work and behavior met the performance criteria.

Needs Improvement/Insufficient: Work and/or behavior did not meet the performance criteria.

Not Evaluated: "Not Evaluated" evaluations may be given only when:

1. the employee is active as of June 30th, the end of the performance year, and
2. the employee has worked less than three (3) months at the evaluating agency within the performance year, and
3. the appointing authority determines that not enough time has elapsed to create an evaluation for the employee.

Required fields are indicated with an asterisk (*).

Overall Rating

* Rating
Please select

* Comments
PES TIP | Be Specific! Your feedback is essential in informing employees of their performance in comparison to expectations of the positions they hold.

Save Draft Save & Continue

Step 9

Review available resources in Section 4: Resources. Click **Save Draft** to return and finish later OR click **Complete** to submit evaluation to Second Level Evaluator as shown below.

Mission Statement Work and Behavior Expectations Overall Results (PES Evaluation Form) Resources Attachments

Resources

Conducting Employee Performance Reviews

PES Evaluation process

PES Guidelines

PES FAQs

SCS-PES REV (Request for Review)

Save Draft Complete

How to Approve Supervisor's Evaluation (as a Second-Level Evaluator)

Step 1

From the PES Landing Page, under Your Action Items, select the supervisor evaluation that you will approve.

Step 2

Review the employee's PES evaluation rating, comments, and attachments. Confirm that supporting documentation has been submitted for a rating of *Exceptional* or *Needs Improvement*.

Step 3

Click **Return** to return the evaluation to the evaluating supervisor if supporting documentation is insufficient.

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OR

Click **Approve** if you agree with the assigned rating as shown below.

Rating
Exceptional

Comments
Awesome work!

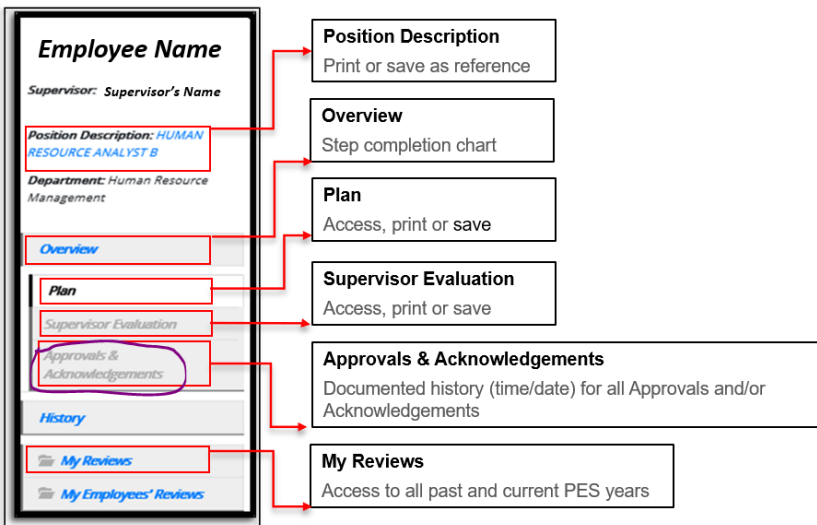
Comment [Check spelling](#)

[Return](#) [Approve](#)

How to Acknowledge Evaluation Meeting Has Taken Place

Step 1

From the employee's left navigation menu, click **Approvals & Acknowledgments** as shown below.



Step 2

Click **Complete** after the evaluation meeting has taken place as shown below.

Supervisor Acknowledges Evaluation meeting has taken place

Click **Complete** below after the evaluation meeting with your employee has taken place.

[Complete](#)

Performance Planning

How to Submit a Performance Plan for the Next Evaluation Period

Step 1

From the PES Landing Page, under Your Action Items, select the employee performance plan that you will be reviewing.

Step 2

From the tab menu, start by completing Section 1: Mission Statement as shown below.

- a. Review the University's mission statement.
- b. Enter the beginning and end date of the evaluation period.
Beginning date should show July 1st of the current year. End date should show June 30th of the following year.
- c. Click **Save & Continue**.

Step 3

Complete Section 2: Work and Behavior Expectations.

- a. Click the link shown as **Bank of Expectations** to review sample work and behavior expectations provided by the State Civil Service. You may use this resource as a guide.
- b. Create an entry for each work expectation and behavior expectation. You may remove a current entry or add a new entry.
- c. Click **Save & Continue**.

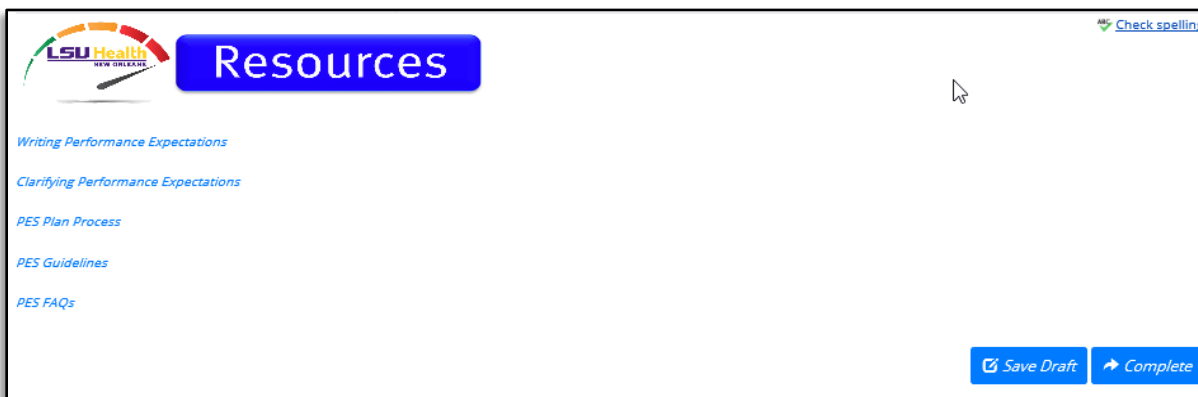
The screenshot shows a web form titled "Work and Behavior Expectations" with the LSU Health logo. The form includes a "Bank of Expectations" link, a "Work Expectations (at least one each) Description" field with "Work Expectation #1" entered, a "Behavior Expectations (at least one each) Description" field with "Behavior Expectation #1" entered, a "Remove Entry?" checkbox, an "Add Entry" button, and "Save Draft" and "Save & Continue" buttons at the bottom right.

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Step 4

Review resources available in Section 3: Resources as shown below. Then, click **Complete**.



How to Approve a Performance Plan (as a Second-Level Approver)

Step 1

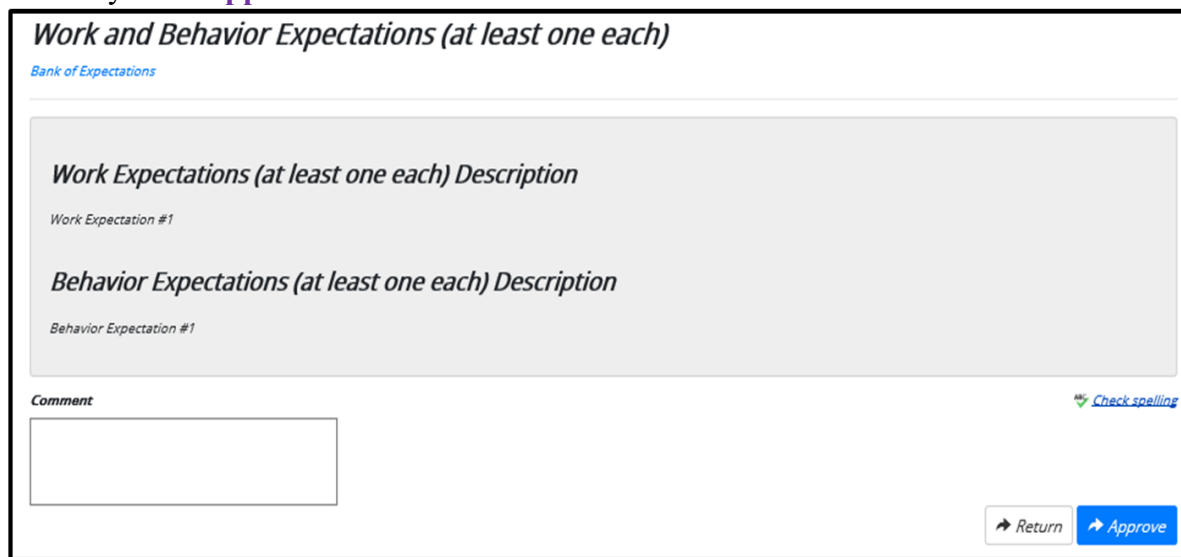
From the PES Landing Page, under Your Action Items, select the performance plan that you will approve.

Step 2

Review all entries for Work and Behavior Expectations. Enter comment, if necessary. You may click **Return** to return the plan to the supervisor if the plan is inefficient

OR

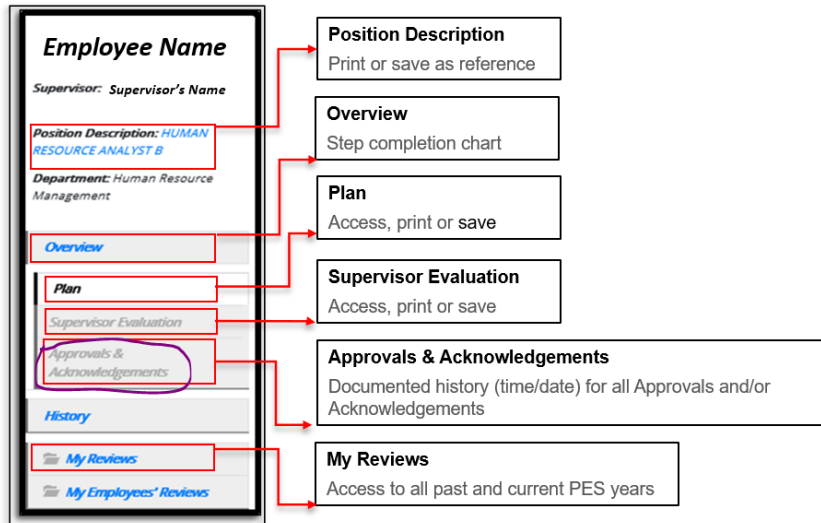
You may click **Approve**.

A screenshot of a web form titled "Work and Behavior Expectations (at least one each)". Below the title is a "Bank of Expectations" section. This section contains two text input areas: "Work Expectations (at least one each) Description" with a sub-label "Work Expectation #1", and "Behavior Expectations (at least one each) Description" with a sub-label "Behavior Expectation #1". Below these is a "Comment" section with a text input box. In the top right corner of the form, there is a "Check spelling" link. At the bottom right, there are two buttons: "Return" and "Approve".

How to Acknowledge the Performance Plan Meeting Has Taken Place

Step 1

From the employee's left navigation menu, click **Approvals & Acknowledgments** as shown below.



Step 2

Click **Complete** as shown below after the plan meeting has taken place as shown below.

