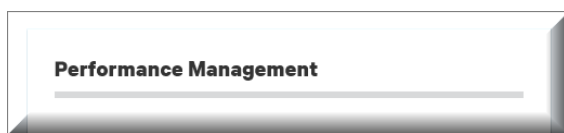
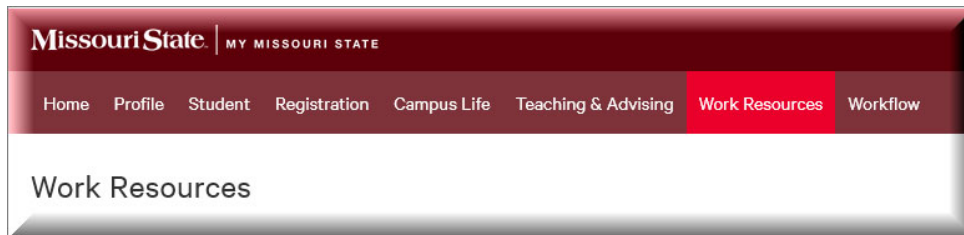


## Supervisor ADP Dashboard Quick Reference Guide – 2020 / 2021

### Overview:

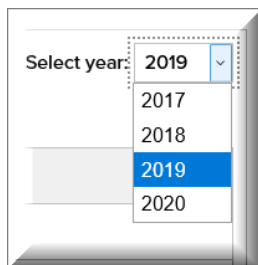
The Supervisor ADP Dashboard is located in the **Performance Management Channel** under the **Work Resources tab** for supervisors.



It serves as one stop location for supervisors to access and view their ADP Planning and Appraisal documents for their employees. Additionally, supervisors will have visibility on their units' ADP documents to monitor status in their down chain of supervision.

There are **4 tabs** on the dashboard: **My ADP, Current, Archived, and Team Summary.**

- Supervisors can select documents to display by year and/or cycle for the **Archived** and **Team Summary** tabs.



- Supervisors can access and view their documents by clicking on the **View Document** link located next to the corresponding document on any of the tabs. Additionally, supervisors can print or save documents if needed.



## Supervisor Dashboard Tabs:

- **My ADP:** Displays the supervisors ADP documents for themselves to include their current and archived documents.

**My Employee Documents** [Help](#)

My ADP Current Archived Team Summary

**Current Documents**

There are no current documents that require your action.

**Archived Documents**

Document	Year	Type	Status
----------	------	------	--------

- **Current:** Displays the status of current active ADP documents (*Planning and Appraisal*) for both the Annual and Probationary cycles to include:
  - Action to be taken with document
  - Employee Name
  - Year of document
  - Type of document (*i.e. plan, appraisal*)
  - Due date for completion of document
  - Current status of document (*see list of statuses starting on page 4 of this document*)

**My Current Subordinate Documents** [Help](#)

My ADP Current Archived Team Summary

**You have planning documents which are due soon.**

**You have planning documents which are past due.**

**Probationary Documents**

Action	Employee	Year	Type	Due Date	Status
--------	----------	------	------	----------	--------

**Annual Documents**

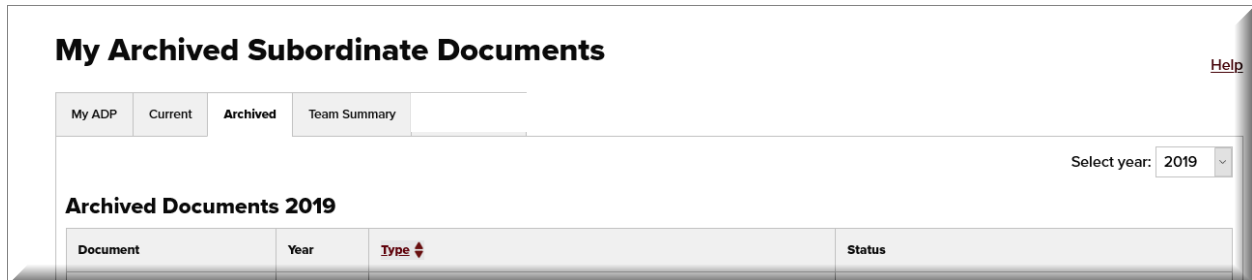
Action	Employee	Year	Type	Due Date	Status
--------	----------	------	------	----------	--------

- Supervisor can generate an ADP document by clicking on the **Create Document** link located next to the corresponding document under the Current tab.

**Action**

[Create Document](#)

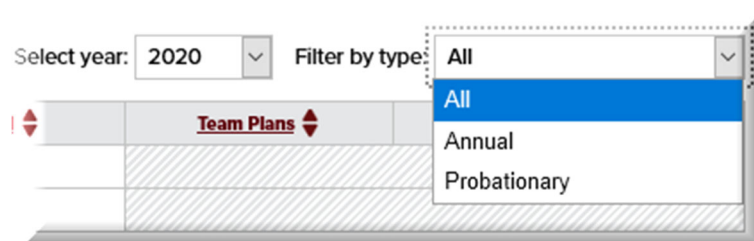
- **Archived:** Displays completed ADP (*Planning and Appraisal*) documents for both the Annual and Probationary cycles to include:
  - Year completed
  - Document type (i.e. planning, appraisal)
  - Ability to select year to search for historical documents on employees



- **Team Summary:** Displays the status and information on the ADP documents (Planning and Appraisal) for the supervisor’s team based on the current organizational chart. Supervisors can select view to display by year and type of cycle.



Supervisors can select to view the display by year and type of cycle with the drop down arrows.



- **All:** Displays the status of Annual documents for the supervisor’s entire department. The view can be expanded to display the status of Annual documents for their subordinate supervisors’ units.
- **Annual:** Displays the status of the Annual documents on the supervisor’s Direct Reports.
- **Probationary:** Displays the status of Probationary documents on the supervisor’s Direct Reports.

## Document Statuses for Supervisor Dashboard:

### Planning Document Actions / Statuses:

- **Create Document /Not Started** – The supervisor has not entered any supplemental goals into the first section of the document. Click on “Create Document Link” to initiate process.
- **In progress** - The supervisor is working on or updating the supplemental goals in the planning document. The planning document is temporarily unavailable to the employee during this status until the supervisor clicks the Notify Employee button.
- **Review** – The supervisor has clicked the Notify Employee button after entering or updating the supplemental goals in the plan. Both the employee and the supervisor can view the planning document. The employee can access the document under their My ADP Documents link under the Work Resources tab.
- **View Document link** – Click to view and access the Planning document under the Current tab. Click to “view” documents under other tabs in the dashboard.
- **Completed** – The supervisor has clicked the Begin Appraisal button to generate the Appraisal document to start the evaluation process. The supplemental goals can no longer be updated on the document. Both the supervisor and employee can view the completed planning document under their Archived area.

**Note:** *The acknowledgement section at the end of the Planning document updates with the Last Updated Date by the supervisor and Last Date Viewed by the employee each time for those actions.*





### Appraisal Document Actions / Statuses:

- **In progress** – The supervisor has clicked the Begin Appraisal button on the Planning document to generate the Appraisal document. The supervisor has started the evaluation process and the document is not visible to the employee during this status.
- **View Document link:** Click to view and access the Appraisal document during the evaluation process under the Current tab. Click to “view” documents under other tabs in the dashboard.
- **Draft** – The supervisor has clicked the Send Draft to Employee button so the employee can review their appraisal. This is a “read only” status and the supervisor has not finalized the appraisal.
- **Waiting Emp** – (Waiting on Employee) - The Appraisal document is available to the employee to acknowledge. The employee can access the document under their My ADP Documents link under the Work Resources tab.
- **Completed** – The employee has acknowledged their Appraisal by clicking on the Acknowledge button. The Appraisal document is completed and moves to Archived.

These statuses will usually display under the Archived or Team Tab in the Dashboard:



- **No ADP Doc** – The Appraisal document was not generated.
- **Annual Not Req** – (Annual Not Required) – The employee does not require an Annual Appraisal based on their hire date with the University.

**Icons:**

-  click to access the document from dashboard
-  document is past due based on deadline dates for the ADP process
-  click to expand information to show the subordinates for the employee
-  select up/down arrows to sort information

**Adding and Editing Goals in the Planning Document:**



Supervisors can copy goals from previous years ADPs, edit existing or copied goals, and add new goals to the first section titled Objectives/Job Duties, Performance Standards, and Appraisal in the Planning document.



- Click the **Copy Previous Goals button** first to copy previous years' goals to the new Planning Document. **Note:** *This option must be selected prior to adding any new goals.*
- Click the **Edit icon** to change the goal. 
- Click the **Delete icon** to delete the goal. 



**Note:** Deleted goals are grayed out. There is an option to hide deleted goals, which are always retrievable by deselecting the option. .

When you click the **Add New Goal button** or click **Edit Icon**, a supplemental box shaded in **yellow** will open up for you to enter the new goal or edit the existing goal information.

Objectives/Job Duties, Performance Standards, and Appraisal				
Number	Objectives/Job Duties: (a)	Measurable Outcomes (b)	Supporting Resources: (Optional) (c)	Function
1	Establish a shared electronic folder for office processes and procedures. <small>1971 characters left</small>	Shared folder and process and procedure documents should be in place by October 1, 2017 for access by the department. <small>1931 characters left</small>	Training on shared folders and supporting software. <small>1996 characters left</small>	 
2	Objective #2	Measurable Outcome #2	Optional Supporting Resources #2	

- Click the Save Icon to save your entry. 
- Click the Close Icon to close window without saving your entries. 

**Note:** *It is important to click the Save Icon if you want to save your entry.*

## Action Buttons for Appraisal and Development Plan Process (ADP) Online Form:

### Planning Document Action Buttons:

#### Supervisor:

- **Copy Previous Goals:**

**Copy previous goals**

Click to copy previous years' goals to the new Planning Document. **Note:** *This option must be selected prior to adding any new goals.*

- **Add a New Goal**

**Add a new goal**

Located in Section 1 of the Planning document for supplemental goals. Use to add additional rows for goals and objectives to the Planning Document. There are 10 rows available for Section 1 of the form.

**Note:** *A Planning document must have a minimum of one (1) supplemental goal in order to start the appraisal process.*

- **Notify Employee**

**Notify Employee**

Click after adding or updating supplemental goals to notify your employee via email that the goals are available to them for viewing. Employees can access and view their Planning document under **Work Resources tab** under the **My ADP Documents** link.

- **Update Goals**

**Update Goals**

Supervisor clicks the Update Goals when they need to update the supplemental goals on their employee's Planning document. The Planning document is temporarily unavailable to the employee during the updates and can be released back to the employee for viewing by clicking the Notify Employee button.

- **Return to Dashboard**

**Return to Dashboard**

Navigation button, which allows the supervisor to return to their home tab (Current) on the dashboard when working within the system.

- **Begin Appraisal**

**Begin Appraisal**

The Begin Appraisal button allows the supervisor to generate their appraisal document for their employee so they can start the evaluation process. Supplemental goals cannot be updated after the supervisor clicks the Begin Appraisal button.

**Note:** This button is available to the supervisor on October 1<sup>st</sup> for the Annual ADP cycle and 28 days prior to the due date of the appraisal for the Probationary ADP cycle.

### **Appraisal Document Action Buttons:**

#### **Supervisor:**

- **Save as Draft:**

**Save as Draft**

Supervisor click prior to exiting the system to save their entries entered in the draft of the document. The draft document is retained in the supervisor's que for future access and completion.

**Note:** *Please click to save your entries.*

- **Send Draft to Employee:**

Send Draft to Employee

A draft of the Appraisal Document is made available to the employee for their viewing. The document is in a “**read only**” mode. The employee is notified via email that they have a draft document available for viewing.

**Note:** *Communications about changes to the Draft Appraisal Document are conducted outside of the online form process.*

- **Submit for Acknowledgement:**

Submit for Acknowledgement

This step **finalizes** the Appraisal process for the supervisor and moves the document in the system to the employee for their review and acknowledgment.

**Note:** *The Appraisal document is available to the employee under their My ADP Documents link located under the Work Resources tab.*

## Employee:

The employee can save their entries on their online Appraisal document in the Employee Comment section as a draft until they are completed and prior to clicking the Acknowledgement button.

- **Save as Draft:**

Save as Draft

The employee clicks Save as Draft button to save entries made in the Employee Comment’s section until the Acknowledge button is clicked. The draft document is retained in the employee’s que for future access and action.

- **Acknowledge:**

Acknowledge

The employee clicks the Acknowledge button after reviewing their Appraisal document and entering any comments into the Employee Comment’s section of the online document. This action indicates review of the completed appraisal and not necessarily agreement with the ratings and comments within.

**Note:** *This action completes the administrative process for the appraisal document. After acknowledgement, the appraisal document is archived and displays a status of Completed.*