

Mid Year Appraisal - Guide for Supervisors

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

- Go to [PeopleAdmin](#), 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.
- Choose the Employee Portal link. This takes you to the homepage for Performance Management. Your employee(s) will appear under ‘Your Action Items’.

STEP 2: Supervisor Creates Plan (to initiate mid year appraisal)

- The Mid Year form will be available in ‘Your Action Items’ (located on the ‘Home’ Tab)
- Click the employee’s appraisal you wish to begin (the description will state ‘Supervisor initiates mid year appraisal’).
- A Plan will generate for the employee. You’ll see the Action Plans and Professional Development Objectives you created at year end populate. Simply click on the blue ‘Action’ button at the top right and select ‘complete’ from the drop down list.
- Click ‘Ok’ on the pop up that asks if you are sure you want to complete the plan. You’ll receive a green message at top stating ‘The plan has been marked complete.’
- A left hand navigation area will now be accessible, click on ‘Supervisor Evaluation’ to begin completing the mid year appraisal.

STEP 3: Supervisor Completes Mid Year Appraisal

- Once ‘Supervisor Evaluation’ has been clicked in the left navigation the employee’s mid year appraisal form will generate (also known as Supervisor Evaluation). You’ll notice 4 tabs indicating the different sections to be completed.
- Complete each of the required fields within each tab. Click the blue ‘Next’ button at the bottom of the page to move to the next tab, or select ‘Save draft’ to save and return to make changes at a later time.
- Once you have finished the appraisal select the blue "Complete" button.
- Click “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 appraisal is completed successfully, you will see a green prompt at the top of your screen.

If you have more mid year appraisals to begin, click the ‘Home’ tab and repeat Step2-3.

STEP 4 – Schedule Meeting with Employee

- Schedule and meet with employees to review their mid year appraisal.
- To access the completed mid year appraisal return to the Home menu of the Employee Portal and click on the item titled “Supervisors acknowledges mid year meeting has occurred”.
 - Once you choose the item you can print a copy of the appraisal form to share with the employee by selecting “print” from the Actions button in the upper right corner of the screen.
- After you have met with the employee, return to the appraisal form to acknowledge the meeting has occurred by selecting the employee’s name from the list of action items on your Home Tab.

- Select “Acknowledge” from the Actions button drop down in the upper right corner of the screen or scroll down to the bottom of the page, and click the blue ‘Acknowledge’ button. A pop up message will appear confirming your acknowledgement, please choose ‘OK’.
- The appraisal will immediately move to the employee’s home page of their employee portal for acknowledgment. (An automatic email will not be generated so it is important to remind the employee to log into the portal to complete their acknowledgment). If you have additional employee appraisals to complete click the ‘Home’ tab to return to your home screen, repeat Step 4 until you have met with and acknowledged all of your employees’ mid year appraisals.

To view your employees’ prior 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.

If you have questions about this process please contact the Human Resources Office at (989)686-9107.