PERFORMANCE MANAGEMENT JOURNAL ENTRIES

TRAINING AND ORGANIZATIONAL DEVELOPMENT

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THE UNIVERSITY OF TOLEDO | Human Resources

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INTRODUCTION

This guide instructs employees and managers with using journal entries, a feature in the PageUp Performance Management System. You can use journal entries to help track professional achievements, development, and key milestones to assist in guiding ongoing performance discussions throughout the years.

It can be difficult to remember everything that takes place during an annual review cycle. Journal entries track all your comments in one location to help enrich each performance discussion.

ACCESS PAGEUP PERFORMANCE MANAGEMENT SYSTEM

Access the PageUp login screen one of two ways:

1. Access located on the Performance Management website,
   https://www.utoledo.edu/depts/hr/training-and-organizational-development/performance-management.html
   a. Scroll down to the section, Online Performance Management System and click on the **PageUp icon**.

ONLINE PERFORMANCE MANAGEMENT SYSTEM

UToledo has partnered with PageUp to customize an online performance management system for staff. The online system allows employees and managers to set goals and expectations, record journal entries to capture year-round progress notes, and complete self-reviews and annual evaluations.

PageUp

- Access to online goal setting and evaluation features.
- Online journal feature to record performance notes throughout the year
- Optional employee self-review
- Online review and acknowledgment of the annual evaluation.
- Access to past reviews completed through the PageUp Performance Management System.

MANAGER RESOURCES	IMPORTANT TRAINING EVENTS	FAQS

ANNUAL PERFORMANCE REVIEW TIMELINE

Reviews Due March 1st ▼	Reviews Due June 1st ▼	Reviews Due September 1st ▼	Reviews Due December 1st ▼

   b. You will be routed to continue logging in by **Single Sign-On** using your utad name and password or continue logging in with your **Utoledo email** by adding your utad password.

2. Access under the **Employee** tab in MYUT, click **PageUp Performance Management** in the **Employment Resources** section.

Employment Resources

Positions for Current Employees

PageUp Hiring System – employee management

PageUp Performance Management

I-9 processing

New Position Control Number Request (PCN)

Separation/Leaving the University

Banner Electronic Personnel Action (ePAF) for GA, and Student Actions

a. You will be directed to the login screen. Because PageUp is part of UToledo' s single sign-on service, log in with your UTAD ID and Password.
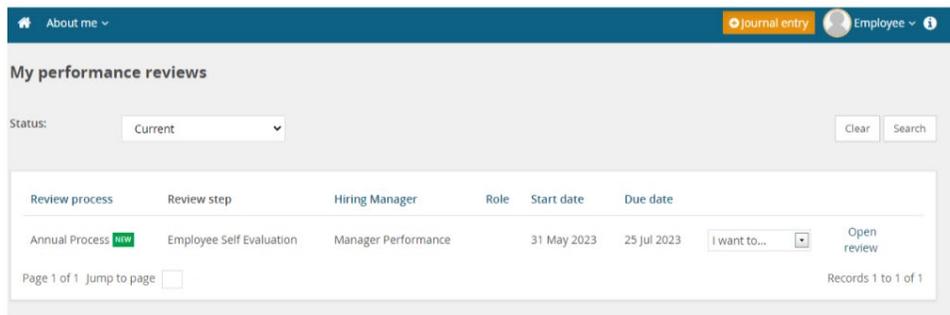

3. Once you have logged in you will be brought to the Performance Portal Dashboard. The **About Me** area is specifically for an employee; you will see your Journal and your Performance Review.

You can use the **Status** dropdown to search for previously completed and/or archived reviews as well as those currently open.

JOURNAL ENTRY

Supervisors and employees can capture performance for next year performance review by creating journal entries on employee's personal performance and accomplishments. Entries are only seen by creator until upload into an evaluation, but always keep in mind that any documentation is considered a public record.

CREATING JOURNAL ENTRIES

Log into the PageUp Performance Management System to create Journal entries. You may make Journal entries one of two ways:

1. Click directly on the yellow **Journal entry** button located on the top ribbon.

   a. This is a quick access tool. The journal entry screen will pop up.
   b. Enter the following:
      i. Title – a quick reminder of the information you want to capture.
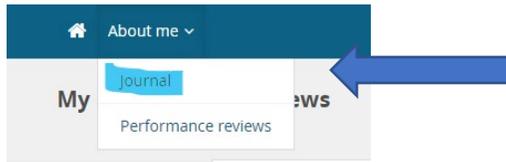   ii. Content – details of the entry

iii. Click **Add** to save.

2. For a slightly more robust entry, click About me, then Journal.

a. Click the **+** (plus) icon

b. In the Create journal entry pop up, enter the following:

i. Title – a quick reminder of the information you want to capture.

ii. Content – details of the entry

iii. Tags – Tags are ways to categorize journal entries and can be used to group related entries when searching through your journal quickly. As you type, any previously used tags will display for selection.

Supervisors: if you are using the journal to capture notes related to your employee(s), be sure to include the employee's name to aid in future searches.
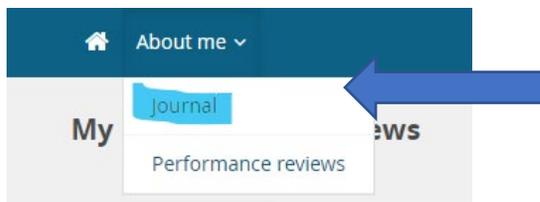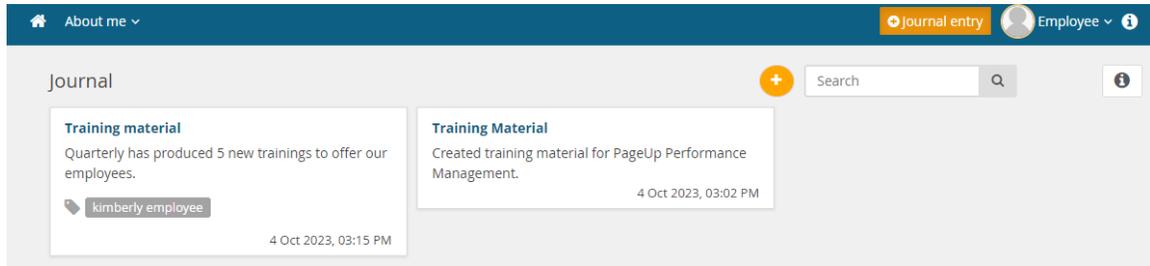

c. Click **Done** to save.

ACCESSING JOURNAL ENTRIES

Finding your journal entries is simple:

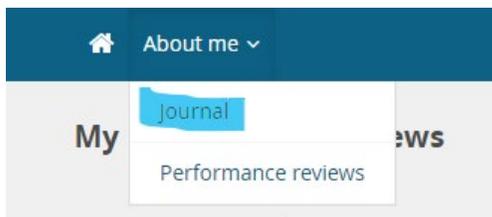1. Click **About Me**, then **Journal.**

2. Browse the list of entries or click the Search field to enter text to locate the required entry by title, content, or tag.
3. Click the magnifying glass icon to load any results.

EDITING JOURNAL ENTRIES

You may edit Journal entries at any time to make changes or additions, add names, add tags or add/amend titles.

1. Click **About Me**, then **Journal.**

2. Browse the list of entries or click the Search field to enter text to locate the required entry by title, content, or tag.
3. Click within the entry box you wish to edit.
4. An Edit journal entry pop-up will appear. Make any necessary edits.

5. Click Done

USING JOURNAL ENTRIES IN A PERFORMANCE REVIEW

Employees and managers may attach Journal entries to a performance review during the evaluation process.

1. When completing an evaluation, you will see an Add comment drop-down box in each of the sections. Click on Link journal entry.

2. Journal entries will be listed, or you may use the **Search** function to enter in a title, key word or tag.

3. Select which entry you wish to attach and click **Link.**
4. The entry is now attached to the evaluation and will be visible for the employee and manager.

Add comment ⌄

✎ Journal Linked by name

Employee Performance
Training material
Quarterly has produced 5 new trainings to offer our employees.