



# PERFORMANCE REVIEW TRAINING MANUAL

## TRAINING AND ORGANIZATIONAL DEVELOPMENT

---

University of Toledo, Human Resources

2801 W. Bancroft Street, MS#205

Toledo, Ohio 43606

(419) 530-4747



Human Resources

## Table of Contents

<b>INTRODUCTION</b> .....	4
<b>ABOUT PAGEUP PERFORMANCE REVIEW</b> .....	4
<b>THE PERFORMANCE REVIEW PROCESS</b> .....	4
<b>ACCESS PAGEUP PERFORMANCE REVIEW</b> .....	5
<b>EMPLOYEE SELF-EVALUATION SECTION</b> .....	7
<b>ACCESSING YOUR OWN SELF-EVALUATIONS</b> .....	7
<b>COMPETENCIES</b> .....	9
<b>RATING SCALE:</b> .....	9
<b>SELF-EVALUATION QUESTIONS</b> .....	13
<b>GOALS AND OBJECTIONS</b> .....	15
<b>FINALIZE YOUR EMPLOYEE SELF-EVALUATION</b> .....	19
<b>MANAGER EVALUATION</b> .....	20
<b>ACCESSING YOUR TEAM’S EVALUATIONS</b> .....	20
<b>COMPETENCIES</b> .....	22
<b>RATING SCALE:</b> .....	22
<b>EMPLOYEE’S SELF-EVALUATION QUESTION</b> .....	25
<b>GOALS AND OBJECTION</b> .....	28
<b>OVERALL COMMENTS</b> .....	32
<b>LEADERSHIP COMPETENCY (FOR THOSE WHO SUPERVISE ONLY)</b> .....	33
<b>SUMMARY: OVERALL COMMENTS</b> .....	34
<b>FINALIZE YOUR MANAGER EVALUATION</b> .....	35
<b>EMPLOYEE REVIEW EVALUATION</b> .....	36
<b>PERFORMANCE REVIEW MEETING</b> .....	38
<b>EMPLOYEE JOB DESCRIPTION</b> .....	39
<b>MANAGER SIGNATURE</b> .....	41
<b>EMPLOYEE ACKNOWLEDGES REVIEW</b> .....	43
<b>STANDARD OF CONDUCT</b> .....	43
<b>EMPLOYEE SIGNATURE</b> .....	45
<b>EMPLOYEE FINAL COMMENTS</b> .....	46
<b>PRINT YOUR PERFORMANCE REVIEW</b> .....	47

<b>PRINT YOUR TEAM'S PERFORMANCE REVIEW</b> .....	48
<b>JOURNAL ENTRY</b> .....	49
<b>CREATING JOURNAL ENTRIES</b> .....	49
<b>ACCESSING JOURNAL ENTRIES</b> .....	51
<b>EDITING JOURNAL ENTRIES</b> .....	51
<b>USING JOURNAL ENTRIES IN A PERFORMANCE REVIEW</b> .....	52

## INTRODUCTION

This training manual was designed to provide you a step-by-step guide in getting acclimated to the Performance Management Process. There is a wealth of information within this manual. We encourage you to utilize this as a resource to help navigate the Performance Review housed in PageUp.

## ABOUT PAGEUP PERFORMANCE REVIEW

PageUp is a talent management platform used to streamline the performance review process. The performance review process is a partnership between the supervisor and the employee to help open the conversation around performance. As part of this partnership, performance reviews are necessary and beneficial, providing supervisors an opportunity to give employees feedback on job performance. The performance review is intended to be a fair and balanced assessment of an employee's actual performance during the review period.

A performance review is a two-way interaction:

- **Supervisors:** A supervisor is a mediator between the organizational interests and the interests of the individual. The purpose of the review is to help the employee reflect on his or her progress, performance, and behavior in an open and honest discussion.
- **Employees:** The contributions made by each of us are key to the success of the university. Performance reviews provide a framework for professional development, recognition of the quality of work provided, and commitment to the mission and goals of the university.

## THE PERFORMANCE REVIEW PROCESS

### **Step 1:** Employee Self-Evaluation (optional)

- Complete Competencies, Self-Evaluation Questions, and Goals & Objectives section.

### **Step 2:** Manager Evaluation

- Complete Competencies, reviews Employees Self-Evaluation Questions, and sets Goals & Objectives section.

### **Step 3:** Employee Reviews Evaluation

- Prior to the Manager discussion

### **Step 4:** Manager Performance Review Discussion

- Conversation with employee to finalize review and set goals and objectives for the coming year.
- Job Description is reviewed, signed and uploaded.
- Manager signs review

### **Step 5:** Employee Acknowledges Review

- Employee signs review then completes the Standards of Conduct and Final Comments section.

## ACCESS PAGEUP PERFORMANCE REVIEW

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.



- 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.



The University of Toledo

Sign in with your organizational account

Username

Password

Sign in

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.

The screenshot shows the 'My performance reviews' section of the Performance Portal Dashboard. At the top, there is a navigation bar with 'About me', 'Journal entry', and 'Employee' options. Below the navigation bar, the 'My performance reviews' section features a 'Status' dropdown menu set to 'Current', with 'Clear' and 'Search' buttons. A table displays the review details:

Review process	Review step	Hiring Manager	Role	Start date	Due date		
Annual Process <span style="color: green;">new</span>	Employee Self Evaluation	Manager Performance		31 May 2023	25 Jul 2023	I want to...	Open review

At the bottom of the table, there is a pagination control: 'Page 1 of 1 Jump to page' and 'Records 1 to 1 of 1'.

## EMPLOYEE SELF-EVALUATION SECTION

The purpose of the self-evaluation is to provide the employee an opportunity to have an active role in the evaluation process, rather than simply being the recipient of feedback from your supervisor. Self-evaluations also serve to:

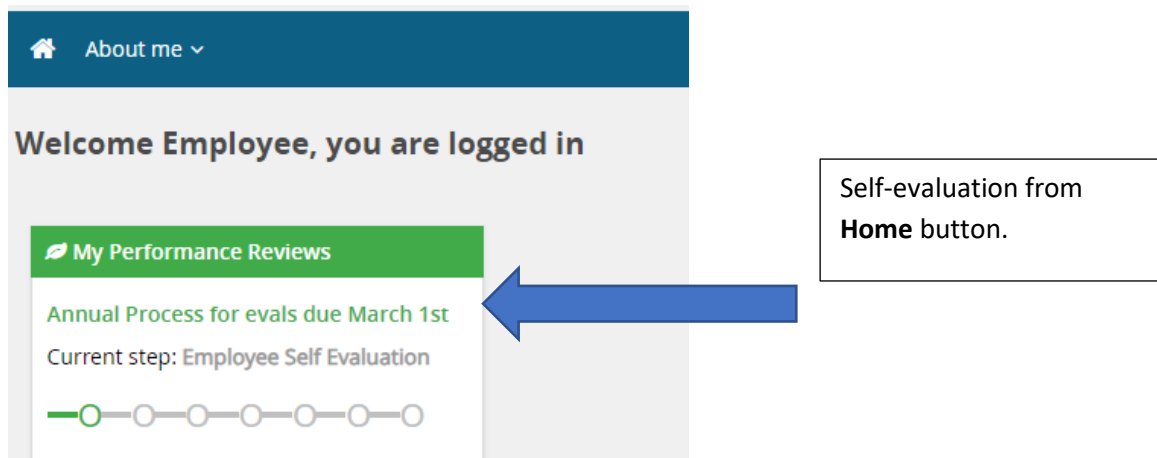
- Facilitate a dialogue between you and your supervisor during the performance evaluation meeting.
- Highlight obstacles you overcame to improve your performance from a prior review period.
- Address any concerns and struggles related to your role.
- Provide an opportunity to document your accomplishments and strengths.

## ACCESSING YOUR OWN SELF-EVALUATIONS

The self-evaluation is the first step in the performance management process. This step is optional, but strongly encouraged. A self-evaluation offers an opportunity to reflect on what you've accomplished during the past year (goals and core responsibilities), as well as how you achieved what you accomplished (your competencies). You will also be able to plan for goals and development opportunities for the next appraisal period.

Your manager will not have access to the evaluation at this step. Steps below provide guidance on completing the online self-evaluation.

1. Open the self-evaluation on the **Home** button or select Performance reviews under the **About me** drop-down menu.



2. Current performance evaluation will be listed on this page.
  - a. Click on **Open Review** to open the evaluation. Or open the **I want to...** drop down menu and select **Open review**.
  - b. From the **I want to...** drop down menu, you will also be able to look at the review process step descriptions.

The screenshot shows the 'My performance reviews' page. At the top, there is a navigation bar with 'About me', 'Journal entry', and 'Employee' options. Below this, the page title 'My performance reviews' is displayed. A 'Status:' dropdown menu is set to 'Current'. A table lists review processes. The first row is 'Annual Process for evals due March 1st' with a review step of 'Employee Self Evaluation', a hiring manager of 'Manager Performance', and dates from '9 Aug 2023' to '3 Oct 2023'. A dropdown menu 'I want to...' is open over this row, showing options: 'Open review' and 'View the review process'. A blue arrow points from a text box on the right to the 'I want to...' dropdown.

Self-evaluation from **About me** drop-down

3. You may also access past performance reviews.
  - a. Using the **Status** drop-down menu, select **Complete** or **All**, then click **Search**.

The screenshot shows the 'My performance reviews' page. The 'Status:' dropdown menu is open, showing options: 'Complete', 'Current', 'Complete', 'Archived', and 'All'. The 'Complete' option is highlighted. A blue arrow points from the right towards the 'Search' button.

- b. All past reviews completed within the Talent Management System will appear with a Review step of **Process Complete**. Click on **View the report** from the **I want to...** drop down menu to open the completed review record.

The screenshot shows the 'My performance reviews' page with the 'Status:' dropdown set to 'Complete'. The table displays a review process: 'Annual Process for evals due March 1st' with a review step of 'Complete', a hiring manager of 'Manager Performance', and dates from '31 May 2023' to '25 Jul 2023'. A dropdown menu 'I want to...' is open over this row, showing options: 'View the report' and 'View the review process'. The 'View the report' option is highlighted. At the bottom, there is a pagination control showing 'Page 1 of 1' and 'Records 1 to 1 of 1'.



4. Upon entering the Performance Review, you will see all the sections that make up the form.



5. During the Employee Self-Evaluation the employee will complete the **Competency, Self-Evaluation Questions and Goals & Objectives section**. Then STOP, the self-evaluation step of the performance management process is complete. To send to your manager select the **Next Steps tab** at the top of the page.

## COMPETENCIES

Competencies are observable and measurable skills and behaviors that contribute to workplace effectiveness and career success. In this section you will rate each competency utilizing the star system and include specific comments. There are nine competencies in this section.

- Technical Knowledge and Skills
- Integrity and Accountability
- Teamwork and Relationship Building
- Problem Solving and Innovations
- Continuous Learning and Development
- Diversity, Equity, and Inclusion
- Adaptable to Change
- Customer Service
- Commitment to UToledo

## RATING SCALE:

**Does Not Meet (1 Star):** May have met some performance objectives, but overall fails to meet performance and behavioral expectations. Immediate action is required to improve performance and/or behavior.

**Needs Growth (2 Stars):** May have met some performance objectives but has not yet met all performance objectives and behavioral expectations. Immediate improvement is needed due to inconsistent performance and/or behavior.

**Meets Expectations (3 Stars):** Performance meets most or all objectives and expectations. Produces expected results that meet the needs and expectations of the role and for the team. Models' behaviors within the competency expectations.

**Exceeds Expectations (4 Stars):** Performance consistently meets and often exceeds all objectives and expectations. Produces or exceeds expected results while demonstrating behaviors within and often beyond the competency expectations. Notable and excellent contributions are widely recognized in the organization.

1. For each competency, review the summary and **select the rating** that best describes your performance.
  - a. In the comment section, provide specific examples of how you demonstrated this competency. To provide comments, select the **blue "Add Comment" button**.

Technical Knowledge and Skills

For this competency, review the summary and select the rating that best describes your performance. In the comment section, provide specific examples of how you demonstrated this competency.

- Understands the methods, procedures and technical skills needed to execute job duties.
- Understands the function of the department and how the job operates within the larger organization.
- Keeps abreast of current trends and developments within their area of expertise.

**Add comment** ▾

There are no comments for this goal.

[View history](#)

**Employee Performance**  
★★★★☆  
Meets expectations

**Manager Performance**  
★★★★★  
Meets expectations  
Performance meets most or all objectives and expectations. Produces expected results that meet the needs and expectations of the role and for the team. Models behaviors within the competency expectations.

2. After adding your comments there are two ways to save your comments.

Technical Knowledge and Skills

For this competency, review the summary and select the rating that best describes your performance. In the comment section, provide specific examples of how you demonstrated this competency.

- Understands the methods, procedures and technical skills needed to execute job duties.
- Understands the function of the department and how the job operates within the larger organization.
- Keeps abreast of current trends and developments within their area of expertise.

I attended additional trainings to keep abreast of current trends and development and shared my training with my team members.

**Save & Share** **Save as Draft** Cancel

**Employee Performance**  
★★★★☆  
Meets expectations

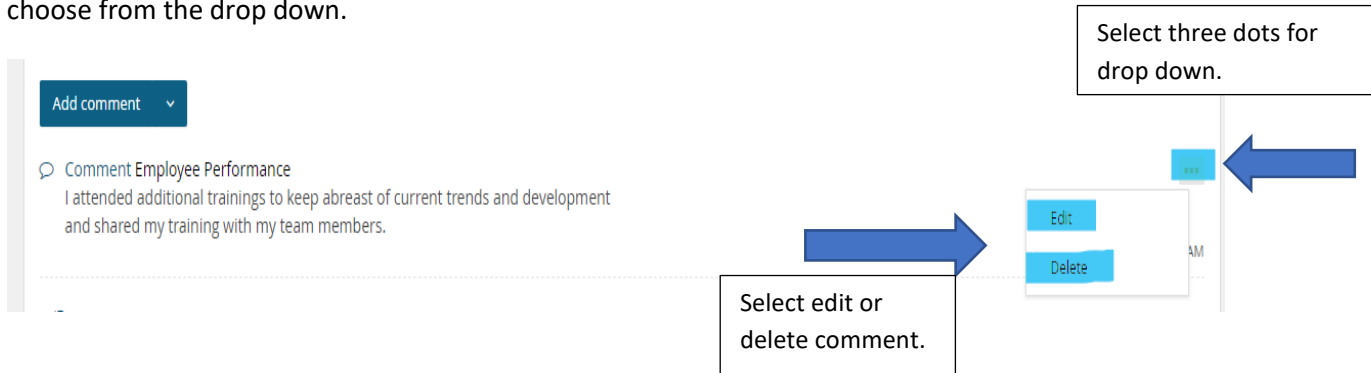
**Manager Performance**  
★★★★★  
Not rated

- a. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Manager Evaluation and Performance Discussion step. Comments won't be shared until that date.

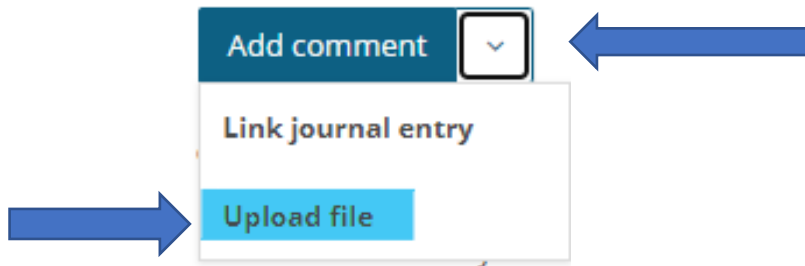
- b. You may also use **Save as Draft** if you wish to return to the comment at a later time. **Note:** Your comments will not be viewable by the supervisor unless you select “Save and Share.”. You will see the following message:

 Draft comment *visible only to me*

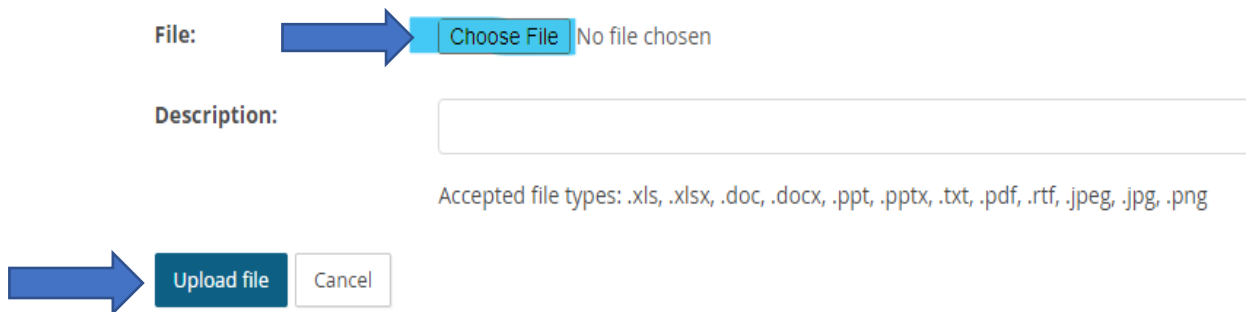
- 3. To **Edit** or **Delete** comments, select the **three dots** on the top right-corner. You will be able to then choose from the drop down.



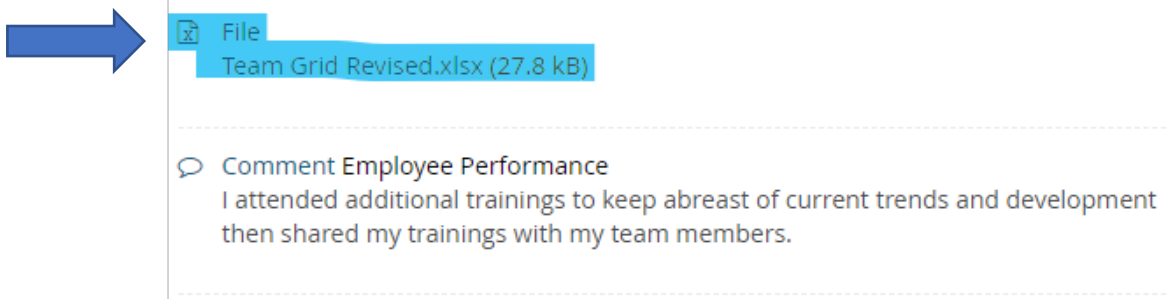
- 4. You may also **Upload a File** to supplement your comment.
  - a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file**.



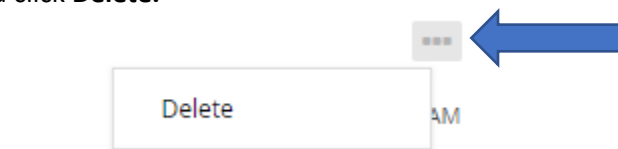
- b. Choose your file from your computer/network. Accepted file types are listed below. Click the Upload file button.



- c. The link for the file will be above completed comments.

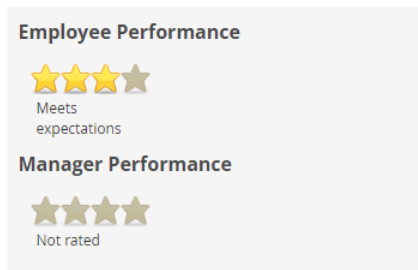


- d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.



5. After completing all competencies, your average of all ratings will show at the bottom of the page in the **Summary: Competencies**

Summary: Competencies



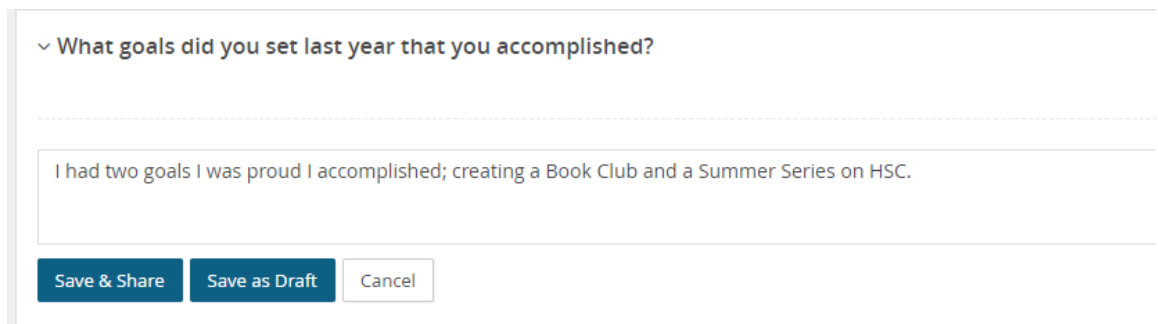
6. Click the **Next** button to move through the review form, to Self-Evaluation Questions.

## SELF-EVALUATION QUESTIONS

Completing the self-evaluation questions can help employees reflect on their strengths and weaknesses and help create goals that will fuel personal and professional growth. Below are the questions that employees may answer:

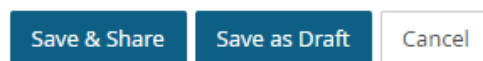
- Were there any goals that you would have liked to have completed during the past appraisal period but were unable to? If so, why?
- Give examples of any collaborative efforts that you were involved in this year. What contributions did you make to the team?
- What kind of support and/or guidance did you received from your supervisor during this appraisal period?
- List any development activities that you participated in during this appraisal period.
- What kind of support and/or guidance would you like to see from your supervisor in the next year?
- How can the University support your efforts to create work-life harmony?
- List any development activities that would interest you during the next appraisal period.

1. Review each question and provide specific examples that best describes your performance in the comment section.
  - a. To provide comments to the Self-Evaluation questions, select the blue "**Add Comment**" button, type your response.



The screenshot shows a self-evaluation question: "What goals did you set last year that you accomplished?". Below the question is a text input field containing the text: "I had two goals I was proud I accomplished; creating a Book Club and a Summer Series on HSC." At the bottom of the form are three buttons: "Save & Share" (dark blue), "Save as Draft" (medium blue), and "Cancel" (white with a grey border).


- b. There are two ways to save your comments:



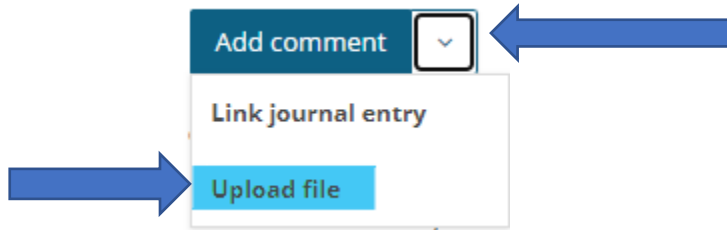
The screenshot shows three buttons: "Save & Share" (dark blue), "Save as Draft" (medium blue), and "Cancel" (white with a grey border).

- c. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Manager Evaluation and Performance Discussion step. Comments will not be shared until that date.

- d. You may also use **Save as Draft** if you wish to return to the comment at a later time.  
**Note:** Your comments will not be viewable by the supervisor unless the comment is published. You will see the following message:

 Draft comment *visible only to me*

2. You may also **Upload a File** to supplement your comment.
- a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file**.

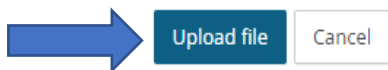


- b. Choose your file from your computer/network. Accepted file types are listed. Click the Upload file button.

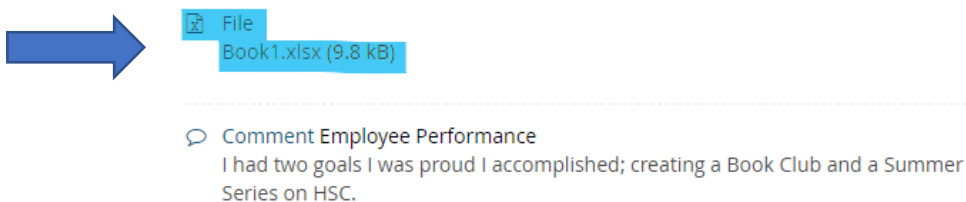
File:  No file chosen

Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png

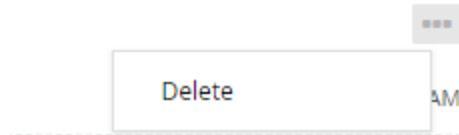


- c. The file will be linked above completed comments.



- d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.





3. After completing the Self-Evaluation Questions, click the **Next** button to move through the review form, to Goals and Objectives.

## GOALS AND OBJECTIONS

Develop and record your SMART goals for your next appraisal period. This is a shared step where the employee and/or manager can enter and edit goals. Any changes made to the goals entered into the system should be discussed in the Performance Review meeting. When setting your SMART goals please consider the following:

Goals are intended to focus attention and resources on what is most important so that you can be successful in achieving your priorities.

Common types of goals are to:

1. Increase something.
2. Make something.
3. Improve something.
4. Reduce something.
5. Develop someone (yourself!)

Create 3-4 SMART goals for the year aligning with the University Strategic plan, department and/or position objectives, and self-development.

For each SMART goal follow the criteria and answer the questions that will help create a roadmap for scoping the work and drafting a plan of action.

6. **Specific** - What is the goal? What do I want to accomplish with this goal?
7. **Measurable** – How will I measure my progress? How will I know I have accomplished the goal(s)?
8. **Achievable** – Do I have the skills and the resources for it? Is achieving this goal realistic with effort and commitment?
9. **Relevant** – Why is this goal important to my development?
10. **Timely** – What is my deadline to accomplish the goal?

1. To create a new goal, click on the pencil icon (in the upper right-hand corner of each box), you can then title your goal and include smart goal details.



- a. Create a title for the goal followed by details involving your SMART goal.

Item title



Measure



Update and create the Training and OD Newsletters

**B I U** | | | | | | | | | | Source

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction

Attachment

Upload document

Submit

- b. You have the option to add an **Attachment** to your SMART goal by clicking the **Upload document** button.

Item title

Title\*

Update and create the Training and OD Newsletters

Measure

**B I U** | | | | | | | | | | Source

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction



Attachment

Upload document

Submit

- c. Choose your file from your computer/network. Accepted file types are listed. Click the **Select file** button.



File upload

Select file

**File restrictions**

Accepted file types: doc, docx, xls, xlsx, ppt, pptx, txt, pdf, rtf, jpg, png



- d. The link for the attachment will be below your Smart goal Title and Measure section. Click **Submit** button to **Add** the SMART goal to review or if you need to **Delete** the SMART goal click on the Trashcan icon.

Item title

Title\* Update and create the Training and OD Newsletters

Measure

**B I U** | | | | | | | | Source

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction

Attachment Kimberly Fahey Goals FY 2024.docx

**Submit** Hit to add.

Hit icon to delete.

2. To provide comments to the SMART goal, select the blue **"Add Comment"** button, type your response.

▼ Update and create the Training and OD Newsletters

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction

This item has the following attachment Kimberly Fahey Goals FY 2024.docx

I will make sure that I send out to team to review newsletter before emailing to all staff and faculty.

**Save & Share** **Save as Draft** Cancel

- a. There are two ways to save your comments:

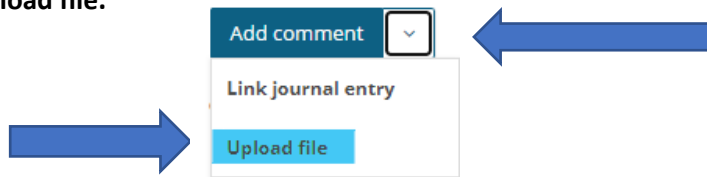
**Save & Share** **Save as Draft** Cancel

- b. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Manager Evaluation and Performance Discussion step. Comments won't be shared until that date.
- c. You may also use **Save as Draft** if you wish to return to the comment at a later time. **Note:** Your comments will not be viewable by the supervisor unless the comment is published. You will see the following message:


 Draft comment *visible only to me*

3. You may also **Upload a File** to supplement your comment.

- a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file**.



- b. **Choose file** from your computer/network. Accepted file types are listed. Click the **Upload file** button.


File:  Choose File No file chosen

Description:


Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png



- c. The link for the file will be above your comments.

 File  
newsletter.docx (3.9 MB)

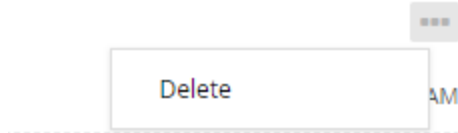
---

 Comment  
I will make sure that I send out to team to review newsletter before emailing to all staff and faculty.

---

- d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.





4. After completing the **Goals and Objectives**, select the Next Steps button in the header. If you select the **Next** button, you will move to the “Overall Comments” section where you will be notified to stop as you have entered a Manager specific section.



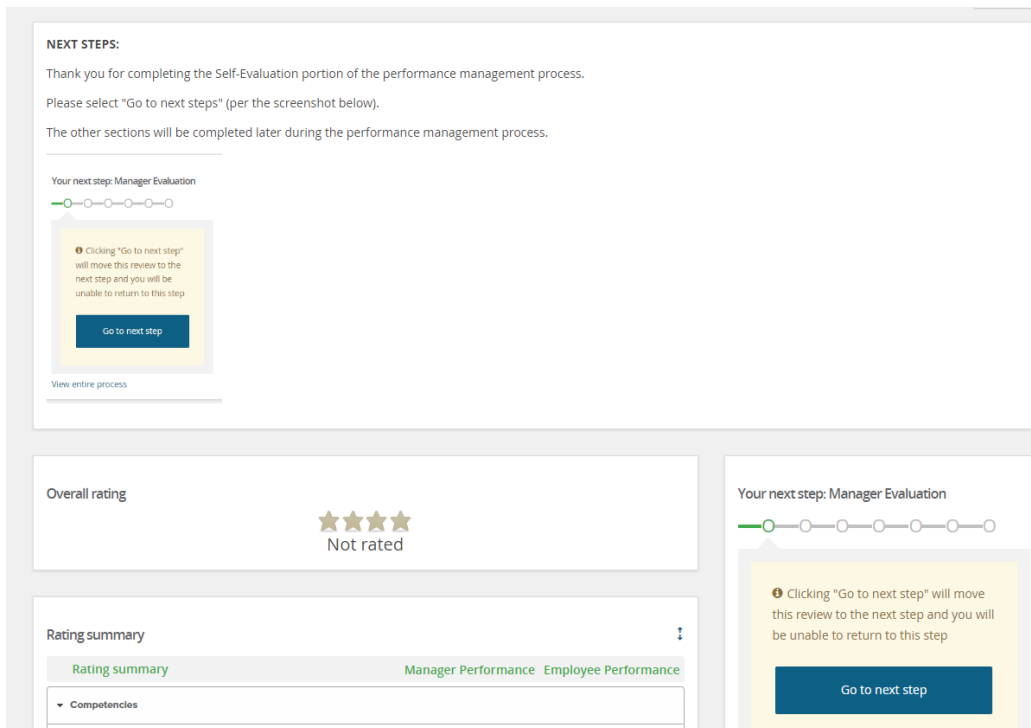
**STOP: This is a Manager specific section.**

## FINALIZE YOUR EMPLOYEE SELF-EVALUATION

1. To send the completed Self Evaluation please select “Next Steps” tab at the top of the page to finalize your Employee Self-Evaluation.



2. Please select “Go to next steps” button to move this review to the next step (Manager review) and you will be unable to return to this step (Employee Self-Evaluation).



## MANAGER EVALUATION

Completing a performance review is an important opportunity to evaluate your employees' accomplishments) as well as their competencies. The Manager Evaluation is the second step in the performance management process.

Feedback is a powerful development resource in the workplace. It helps your employees to understand their strengths, weaknesses and how others perceive them, so they can become the best version of themselves. During this step, the manager should:

- Reflect on the employees' accomplishments, contributions and identifies area for development.
- Review the employee self-evaluation to help you gauge how much you and the employee are on the "same page."
- Assign performance rating for competencies during the time period and provide comments to support rating given.
- Set SMART goals and expectations for the coming year.

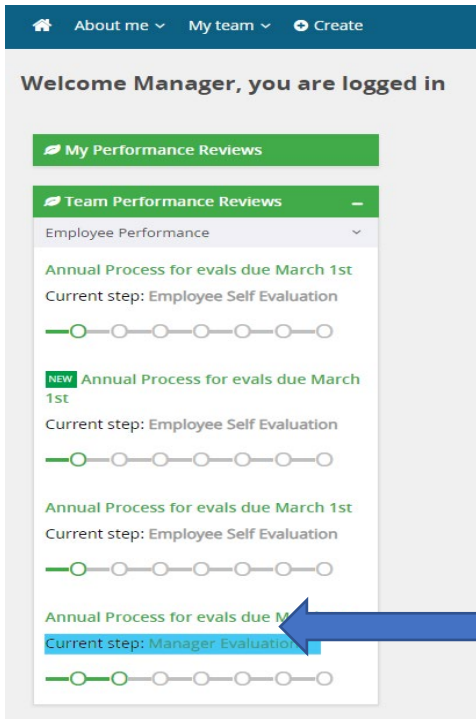
Please complete the Competencies, review Employee's Self-Evaluation Questions, Goals & Objectives, and Overall Comments section. Then select the **Next Steps** button; this will send the performance review back to the employee to review before the performance review meeting.

## ACCESSING YOUR TEAM'S EVALUATIONS

The annual performance review launched through the employee self-evaluation was the first step in the performance management process. Your employee has completed their self-evaluation and the process has moved to the next step, Manager Evaluation.

Steps below provide guidance to complete the online Manager Evaluation.

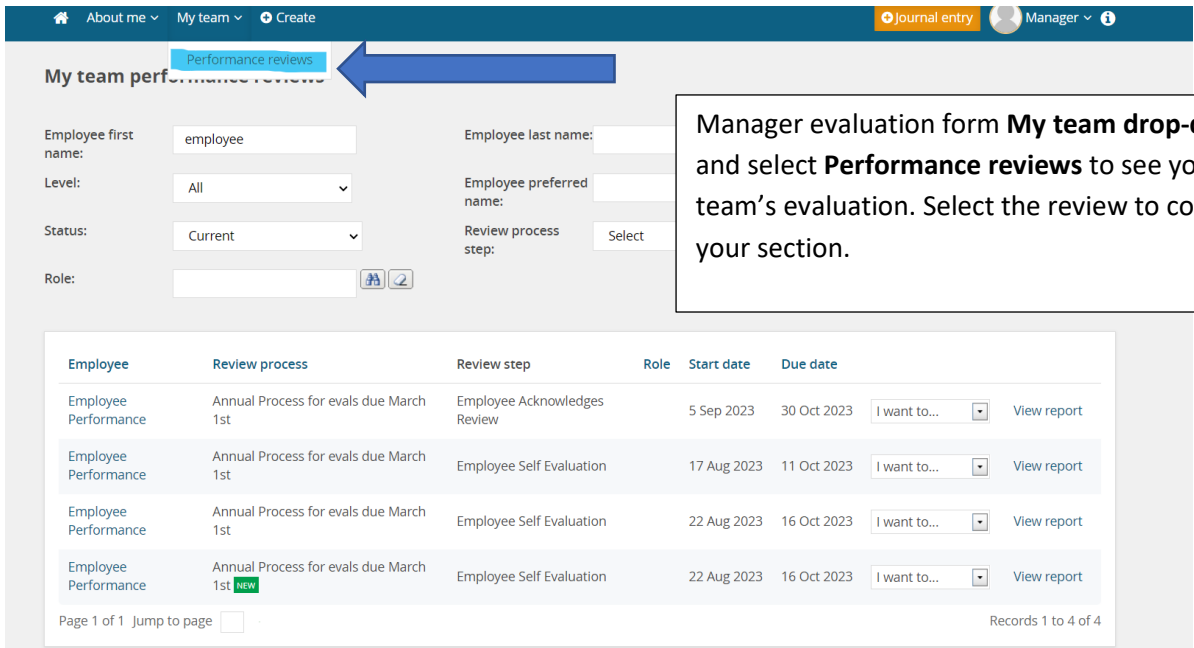
1. There are two ways to open your team's performance reviews; one option is under **Home** button, the second option is through the **My team** drop-down menu. You will be able to access your team's performance reviews that are at Manager Evaluation status. Note: you will also be able to see the progress of the performance review for each employee and see what step of the evaluation they are on.
  - a. Assess from **Home** button.



Manager evaluation from **Home** button.

Notice this Performance Review current step is listed at Manager Evaluation. Select this review to complete your sections.

b. Assess from **My team** drop-down.



Manager evaluation form **My team** drop-down and select **Performance reviews** to see your team's evaluation. Select the review to complete your section.

2. Upon entering the Performance Review, you will see all the sections that make up the form.



3. During the Manager Evaluation the manager will complete the **Competencies section**, review and make comments on the **Employee Self-Evaluation Questions, the Goals & Objectives section and finally the Overall Comments section**. Then STOP, the Manager Evaluation step of the performance management process is complete. The last step is to select the **Next Steps** button; and send the performance review back to the employee for review.

## COMPETENCIES

Competencies are observable and measurable skills and behaviors that contribute to workplace effectiveness and career success. In this section you will rate the employee in each competency utilizing the star system and include specific comments. There are nine competencies in this section.

- Technical Knowledge and Skills
- Integrity and Accountability
- Teamwork and Relationship Building
- Problem Solving and Innovations
- Continuous Learning and Development
- Diversity, Equity, and Inclusion
- Adaptable to Change
- Customer Service
- Commitment to UToledo

## RATING SCALE:

**Does Not Meet (1 Star):** May have met some performance objectives, but overall fails to meet performance and behavioral expectations. Immediate action is required to improve performance and/or behavior.

**Needs Growth (2 Stars):** May have met some performance objectives but has not yet met all performance objectives and behavioral expectations. Immediate improvement is needed due to inconsistent performance and/or behavior.

**Meets Expectations (3 Stars):** Performance meets most or all objectives and expectations. Produces expected results that meet the needs and expectations of the role and for the team. Models' behaviors within the competency expectations.

**Exceeds Expectations (4 Stars):** Performance consistently meets and often exceeds all objectives and expectations. Produces or exceeds expected results while demonstrating behaviors within and often beyond the competency expectations. Notable and excellent contributions are widely recognized in the organization.

1. For each competency, review the competency definition and **select the rating** that best describes the employee's performance. You will be able to view the employee's self-evaluation rating for each competency, as well as any supporting documents the employee uploaded and employee comments.
  - a. In the comment section, provide specific examples of how the employee demonstrated this competency. To provide comments, select the **Add Comment** button.

Technical Knowledge and Skills

For this competency, review the summary and select the rating that best describes your performance. In the comment section, provide specific examples of how you demonstrated this competency.

- Understands the methods, procedures and technical skills needed to execute job duties.
- Understands the function of the department and how the job operates within the larger organization.
- Keeps abreast of current trends and developments within their area of expertise.

**Employee Performance**  
★★★★☆  
Meets expectations

**Manager Performance**  
★★★★☆  
Meets expectations

**Add comment** ▾

File Employee Performance  
Team Grid Revised.xlsx (27.8 kB)

Comment Employee Performance  
I attended additional trainings to keep abreast of current trends and development then shared my trainings with my team members.

Meets expectations  
Performance meets most or all objectives and expectations. Produces expected results that meet the needs and expectations of the role and for the team. Models behaviors within the competency expectations.

Yesterday at 11:25 AM

Edited Last Monday at 1:13 PM

[View history](#)

2. After adding your comments there are two ways to save your comments.

Technical Knowledge and Skills

For this competency, review the summary and select the rating that best describes your performance. In the comment section, provide specific examples of how you demonstrated this competency.

- Understands the methods, procedures and technical skills needed to execute job duties.
- Understands the function of the department and how the job operates within the larger organization.
- Keeps abreast of current trends and developments within their area of expertise.

**Employee Performance**  
★★★★☆  
Meets expectations

**Manager Performance**  
★★★★☆  
Meets expectations

Employee takes the initiative to keep developing new skills and attends trainings.

**Save & Share** **Save as Draft** Cancel

File Employee Performance  
Team Grid Revised.xlsx (27.8 kB)

Comment Employee Performance  
I attended additional trainings to keep abreast of current trends and development then shared my trainings with my team members.

Yesterday at 11:25 AM

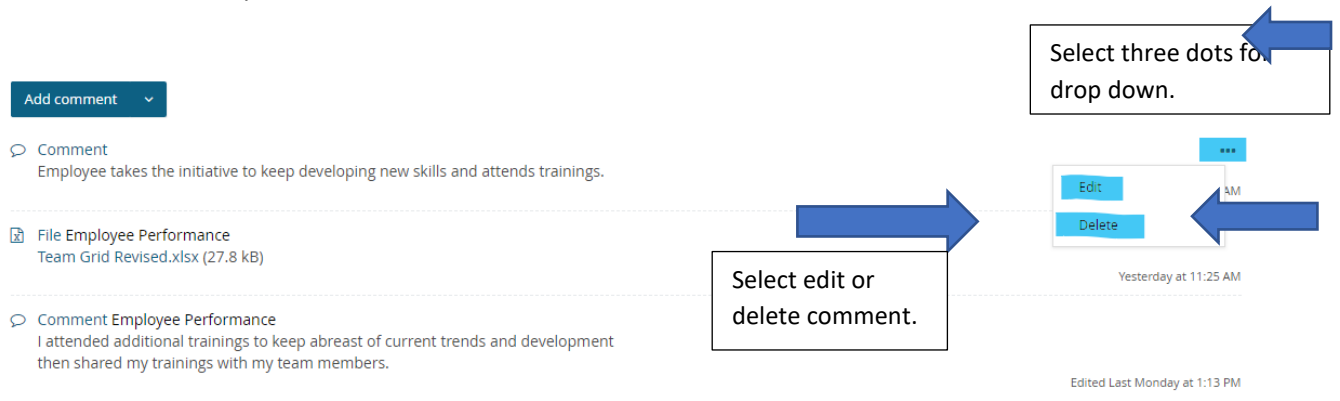
Edited Last Monday at 1:13 PM

[View history](#)

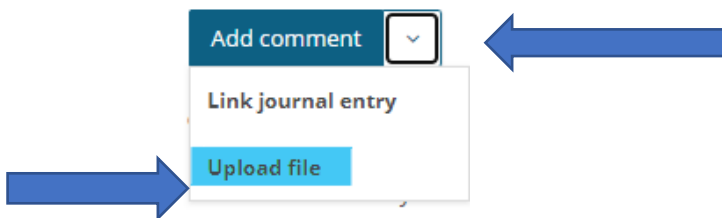
- a. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Employee Review and Performance Discussion step. Comments won't be shared until that date.
- b. You may also use **Save as Draft** if you wish to return to the comment at a later time. **Note:** Your comments will not be viewable by the employee unless the comment is published. You will see the following message:

 Draft comment *visible only to me*


- 3. To **Edit** or **Delete** comments, select the **three dots** on the top right-corner. You will be able to then choose from the drop down.



- 4. You may also **Upload a File** to supplement your comment.
  - a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file**.




- b. Choose your file from your computer/network. Accepted file types are listed below. Click the Upload file button.

File:  No file chosen

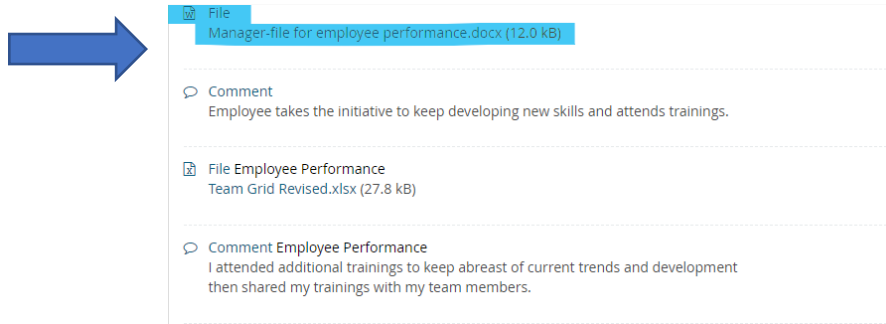
Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png

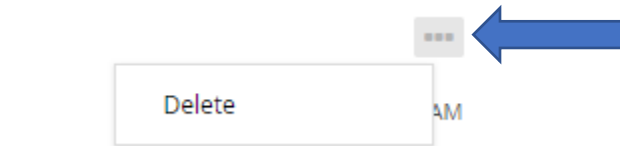




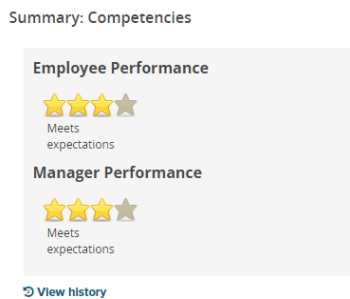
c. The link for the file will be above completed comments.



d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.



5. After completing all competencies, the manager's average of all ratings of the employee will show at the bottom of the page in the **Summary: Competencies**



6. Click the **Next** button to move through the review form, to Self-Evaluation Questions.

## EMPLOYEE'S SELF-EVALUATION QUESTION

The employee completed the self-evaluation questions to reflect on their strengths and weaknesses and create goals that will fuel personal and professional growth. Below are the questions that employees have the option to answer:

- Were there any goals that you would have liked to have completed during the past appraisal period but were unable to? If so, why?
- Give examples of any collaborative efforts that you were involved in this year. What contributions did you make to the team?
- What kind of support and/or guidance did you received from your supervisor during this appraisal period?
- List any development activities that you participated in during this appraisal period.

- What kind of support and/or guidance would you like to see from your supervisor in the next year?
- How can the University support your efforts to create work-life harmony?
- List any development activities that would interest you during the next appraisal period.

Review each of the questions and the employee’s response. They should have provided specific examples that best describes their performance in the comment section and had the option to upload supporting files.

1. To provide comments to the Employee’s Self-Evaluation questions, select the blue **Add Comment** button, type your response.


▼ What goals did you set last year that you accomplished?


Very proud of you! These were two successful programs that we added to our catalog of trainings.

Save & Share

Save as Draft

Cancel

 File Employee Performance  
Book1.xlsx (9.8 kB)

 Comment Employee Performance  
I had two goals I was proud I accomplished; creating a Book Club and a Summer Series on HSC.

- a. There are two ways to save your comments:


Save & Share

Save as Draft

Cancel

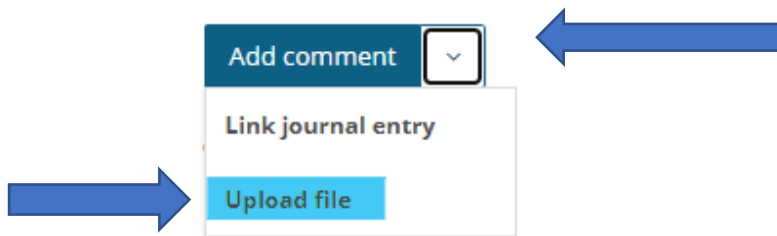
- b. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Employee Review and Performance Discussion step. Comments will not be shared until that date.
- c. You may also use **Save as Draft** if you wish to return to the comment at a later time.  
**Note:** Your comments will not be viewable by the supervisor unless the comment is

published. You will see the following message:

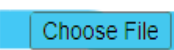
 Draft comment *visible only to me*

2. You may also **Upload a File** to supplement your comment.

- a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file**.



- b. Choose your file from your computer/network. Accepted file types are listed. Click the Upload file button.

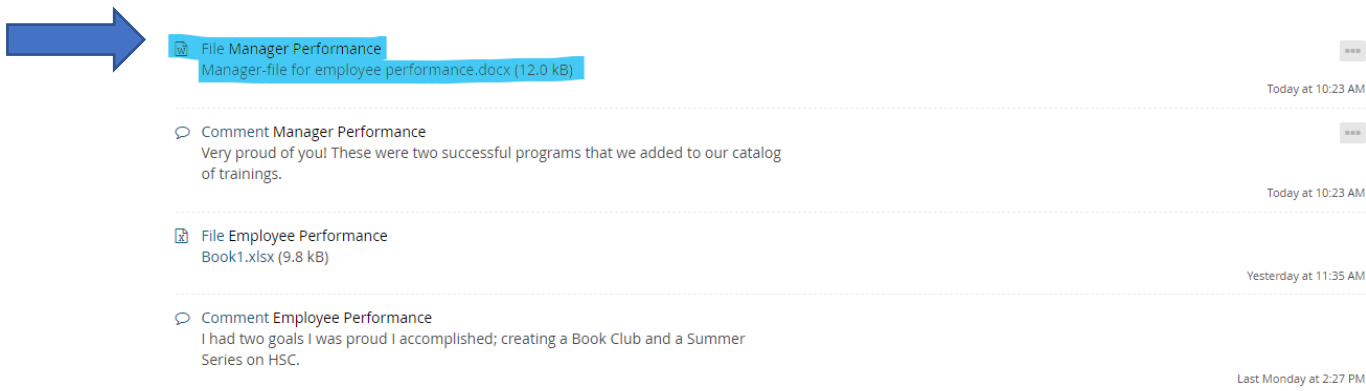
File:  No file chosen

Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png



- c. The file will be linked above completed comments.



- d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.



3. After reviewing and adding any comments or files to the Employee's Self-Evaluation Questions, click the **Next** button to move through the review form, to Goals and Objectives.

## GOALS AND OBJECTION

Review the employee's SMART goals. If the employee has not created SMART goals, draft 3-4 goals to review with the employee. This is a shared step where both the employee and manager can enter and edit goals. Any changes made to the goals entered the system should be discussed in the performance review meeting. When setting your SMART goals please consider the following:

Goals are intended to focus attention and resources on what is most important so you that you can be successful in achieving your priorities.

Common types of goals are to:

1. Increase something.
2. Make something.
3. Improve something.
4. Reduce something.
5. Develop someone (yourself!)

Create 3-4 SMART goals for the year aligning with the University Strategic plan, department and/or position objectives, and self-development.

For each SMART goal follow the criteria and answer the questions that will help create a roadmap for scoping the work and drafting a plan of action.

6. **Specific** - What is the goal? What do I want to accomplish with this goal?
7. **Measurable** – How will I measure my progress? How will I know I have accomplished the goal(s)?
8. **Achievable** – Do I have the skills and the resources for it? Is achieving this goal realistic with effort and commitment?
9. **Relevant** – Why is this goal important to my development?
10. **Timely** – What is my deadline to accomplish the goal?

1. To create a new goal, click on the pencil icon (in the upper right-hand corner of each box), you can then entitle your goal and include smart goal details.



a. Create a title for the goal followed by details involving the SMART goal.

Item title

**Title\*** Update and create the Training and OD Newsletters

**Measure**

**B I U** | | | | | | Source

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction

**Attachment** Upload document

**Submit**

b. You have the option to add an **Attachment** to the SMART goal by clicking the **Upload document** button.

Item title

**Title\*** Update and create the Training and OD Newsletters

**Measure**

**B I U** | | | | | | Source

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction

**Attachment** Upload document

**Submit**

c. Choose your file from your computer/network. Accepted file types are listed. Click the **Select file** button.

**File upload**

**Select file**

**File restrictions**  
Accepted file types: doc, docx, xls, xlsx, ppt, pptx, txt, pdf, rtf, jpg, png

- d. The link for the attachment will be below the Smart goal Title and Measure section. Click **Submit** button to **Add** the SMART goal to review or if you need to **Delete** the SMART goal click on the Trashcan icon.

Item title

Title\* Update and create the Training and OD Newsletters

Measure

**B I U** | | | | | | | | Source

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction

Attachment Kimberly Fahey Goals FY 2024.docx

**Submit** Hit to add.

Hit icon to delete.

2. To provide comments to the SMART goal, select the blue **"Add Comment"** button, type your response.

▼ Update and create the Training and OD Newsletters

- Determine monthly topics for newsletter
- Update training calendar on newsletter
- Include any additional HR updates on newsletter

Linked to strategies and Initiatives

- Build high reliability in HR
- Builds high level of customer service
- Foster a culture of excellence by supporting retention, career progression and high job satisfaction

This item has the following attachment Kimberly Fahey Goals FY 2024.docx

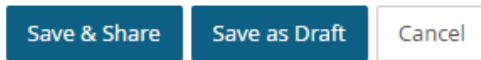
This is a great goal, I look forward to our newsletter reaching faculty and staff to help them choose programs that will develop their career/skills.

**Save & Share** **Save as Draft** Cancel

File Employee Performance  
newsletter.docx (3.9 MB) Yesterday at 1:30 PM


Comment Employee Performance  
I will make sure that I send out to team to review newsletter before emailing to all staff and faculty. Edited Yesterday at 1:13 PM

- a. There are two ways to save your comments:



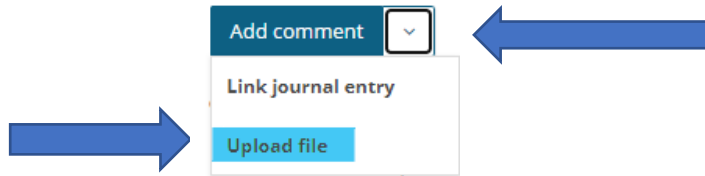
- b. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Employee Review and Performance Discussion step. Comments won't be shared until that date.

- c. You may also use **Save as Draft** if you wish to return to the comment at a later time. **Note:** Your comments will not be viewable unless the comment is published. You will see the following message:

- a.  *Draft comment visible only to me*

3. You may also **Upload a File** to supplement your comment.

- a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file**.



- b. **Choose file** from your computer/network. Accepted file types are listed. Click the **Upload file** button.

File:  Choose File No file chosen

Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png



- c. The link for the file will be above your comments.

File Manager Performance  
 Kimberly Fahey Goals FY 2024.docx (31.2 kB) Today at 10:39 AM

---

Comment Manager Performance Today at 10:38 AM  
 This is a great goal, I look forward to our newsletter reaching faculty and staff to help them choose programs that will develop their career/skills.

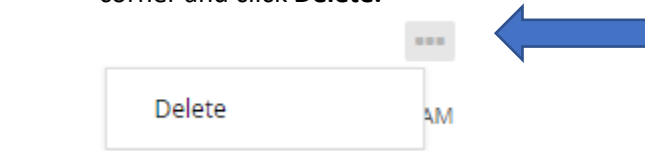
---

File Employee Performance  
 newsletter.docx (3.9 MB) Yesterday at 1:30 PM

---

Comment Employee Performance Edited Yesterday at 1:13 PM  
 I will make sure that I send out to team to review newsletter before emailing to all staff and faculty.

d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.



4. After completing the **Goals and Objectives**, click the **Next** button which will move you to the Overall Comment section.

## OVERALL COMMENTS

There are two objectives in the overall comment section; the first is to provide feedback on the leadership competency (if applicable), the second is to provide overall comments for the entire evaluation.

For the Leadership competency, you as the manager will only provide feedback to the employee on their **leadership competency** if they supervise employees. If they do not supervise employees; then do not comment on the leadership competency.

- Leadership competency: Utilizes appropriate interpersonal styles and methods to inspire and guide employees toward goal achievement; develops and cultivates a high performing team; recognizes staff contributions and effectively resolves conflict.

Include any **overall comments** regarding the employee's performance for the last appraisal period. Please include any specific examples of achievements/accomplishments, challenges, etc.



## LEADERSHIP COMPETENCY (FOR THOSE WHO SUPERVISE ONLY)

### Leadership (for those who supervise only)

Add comment ▾

There are no comments for this goal.

- a. To provide comments to the employee on their Leadership competency, select the blue **Add Comment** button, type your response.

### Leadership (for those who supervise only)

Employee leads by example, inspires their team to produce high quality work and supports their development.  
Meets expectations as a leader


Save & Share Save as Draft Cancel

There are no comments for this goal.

2. There are two ways to save your comments:

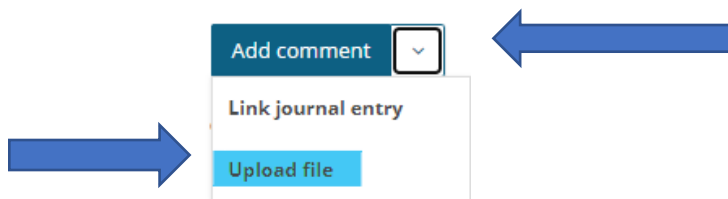
Save & Share Save as Draft Cancel

- a. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Manager Evaluation and Performance Discussion step. Comments will not be shared until that date.
- b. You may also use **Save as Draft** if you wish to return to the comment at a later time. **Note:** Your comments will not be viewable by the supervisor unless the comment is published. You will see the following message:


 *Draft comment visible only to me*

3. You may also **Upload a File** to supplement your comment.

- a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file.**




- b. Choose your file from your computer/network. Accepted file types are listed. Click the Upload file button.


File:  Choose File No file chosen

Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png


 Upload file Cancel

- c. The file will be linked above completed comments.

 Add comment File Career Development Plan.docx (35.3 kB) Today at 11:24 AM

Comment  
Employee leads by example, inspires their team to produce high quality work and supports their development.  
Meets expectations as a leader Today at 11:20 AM


- d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.


 Delete AM


## SUMMARY: OVERALL COMMENTS

When writing overall performance review comments, you should highlight the accomplishments of the employee. While the review is supposed to be objective, you should also ensure that you validate the achievements of the employee by providing ample examples of how they have met some of their key performance measurables.

Summary: Overall Comments

 **Employee**

 **Manager**

**B I U**  Source

- Responds quickly to learn new things. Is always ready to handle new projects or even learn new technologies that will assist in her job.
- You have been able to initiate and execute new Ideas such as a book club and Summer Series that have created marked improvements in the workplace
- Is highly respected by your peers and subordinates for always being ready to provide a helping hand.

## FINALIZE YOUR MANAGER EVALUATION

1. Once you have completed the Overall Comments section, select "Next Steps" in the header to send the evaluation back to the employee for review.



2. Please select **"Go to next steps"** button to move this review to the next step (Employee review) and you will be unable to return to this step (Manager Evaluation).

**NEXT STEPS:**  
Thank you for completing the Manager Evaluation portion of the Performance Management Process.

- Please select "Go to next steps" (per the screenshot below)
- The employee will review the evaluation prior to the evaluation meeting
- Set up a meeting with your employee to review the evaluation

Your next step: Employee Review Evaluation

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

[Go to next step](#)

[View entire process](#)

**Overall rating**  
★★★★★  
Meets expectations

**Rating summary**

Rating summary	Manager Performance	Employee Performance
<b>Competencies</b>		
1. Technical Knowledge and Skills	Meets expectations	Meets expectations
2. Integrity & Accountability	Meets expectations	Meets expectations

Your next step: Employee Review Evaluation

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

[Go to next step](#)

[View entire process](#)

## EMPLOYEE REVIEW EVALUATION

During this step in the performance management process, the employee reviews the evaluation in preparation for the performance evaluation meeting with the manager. The employee will read through the Competency ratings, Goals and Objectives and Overall Comments sections to review your manager's evaluation of your performance. Understand that the performance review meeting is a two-way conversation, so it is important to be prepared.

### Tips to prepare:

- Be open to feedback and offer suggestions for how you can improve.
  - Be specific about what you have contributed to your team and department.
  - Be open to feedback and offer suggestions for how you can improve.
  - Be specific about what you have contributed to your team and department.
  - Use your goals or responsibilities as a guide to measure your performance.
  - Highlight any training you have undertaken or new skills you have learned.
  - Share how you managed to adjust to challenges.
  - Work with your manager to set goals and objectives for the coming year.
1. Open the self-evaluation on the **Home** button or select Performance reviews under the **About me** drop-down menu.
  2. Current performance evaluation will be listed on this page.
    - a. Click on **Open Review** to open the evaluation. Or open the **I want to...** drop down menu and select **Open review**.
    - b. From the I want to...drop down menu, you will also be able to look at the review process step descriptions.

The screenshot shows the 'My performance reviews' page. At the top, there is a navigation bar with 'About me' and 'Employee' dropdowns. Below the header, there is a 'Status' dropdown set to 'Current' and 'Clear' and 'Search' buttons. The main content is a table with the following data:

Review process	Review step	Hiring Manager	Role	Start date	Due date	
Annual Process for evals due March 1st	Employee Review Evaluation	Manager Performance		9 Aug 2023	3 Oct 2023	I want to... Open review View the review process Open review

4. Read through the Competency ratings, Self-Evaluation Questions, Goals & Objectives, and Overall Comments sections to review your manager's evaluation. Then select Next Steps tab at top of page.



5. Please select **“Go to next steps”** button to move this review to the next step (Manager Review Discussion) and you will be unable to return to this step (Employee review).

**NEXT STEPS:**  
Thank you for completing the Employee Review portion of the performance management process.  
Please select "Go to next steps" (per the screenshot below).  
Your manager will be setting up a meeting to review your performance evaluation.

Your next step: Review Discussion

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

View entire process

Overall rating

★★★★☆  
Meets expectations

Rating summary

Rating summary	Manager Performance	Employee Performance
Competencies		

Your next step: Manager Review Discussion

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

## PERFORMANCE REVIEW MEETING

The performance review meeting aims to create a space for sharing feedback on an employee's annual performance. It is also an opportunity for both the employee and manager to discuss the employee's accomplishments, challenges, development, and goals. It is important that the manager and employee discuss the combined comments, competencies ratings and set SMART goals together.

### Before the meeting:

- Schedule the meeting in a private setting with ample time, so you don't rush the conversation.
- Prepare for the meeting by having a narrative to refer to when making your points.
- Set 1-2 achievable goals for employee and ask the employee to be ready to discuss additional goals together.

### Agenda for the meeting:

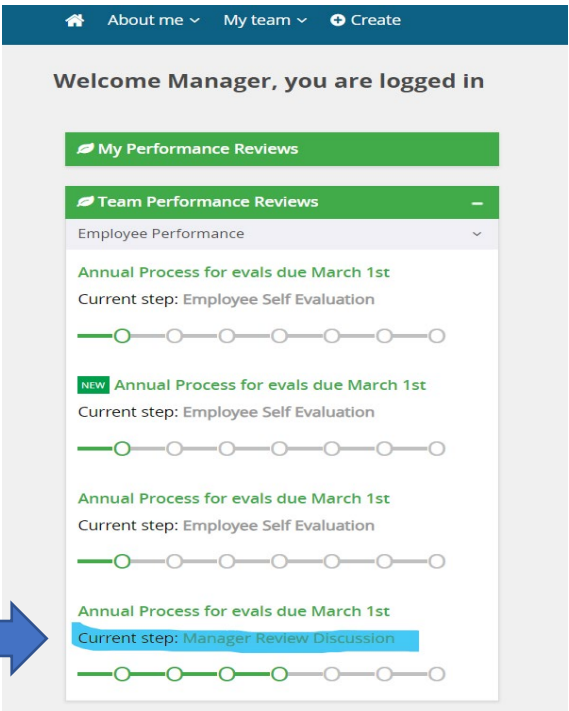
<b>Welcome</b>	Welcome the employee and ask: <ul style="list-style-type: none"><li>• How did you see your performance over the last year?</li><li>• What were some of your significant accomplishments?</li><li>• What didn't quite go as planned? What happened, and what did you learn?</li></ul>
<b>Discussion</b>	Discuss competencies and discussion questions from the evaluation, both accomplishments and challenges.
<b>Goals</b>	Work together to set goals for the next year and assist with resources for performance development. <ul style="list-style-type: none"><li>• What do you need from me to be successful this coming year?</li></ul>
<b>Finalize</b>	Make any changes to the evaluation as discussed in the meeting, upload the signed job description, sign the evaluation and send to employee.
<b>Follow-up</b>	Follow-up throughout the year on performance, goals, and development

### During the meeting:

1. Have a welcoming and positive approach when talking with employee(s), remember your intentions.
2. Be an Active Listener
  - Listen to hear the employee and pay attention to non-verbal cues.
  - Ask open-ended questions to understand.

- Allow the employee to make a case, and if they have ample evidence, consider adjusting the review.
3. Delivering a Difficult Message
    - Stick to the facts, explain why this concerns you, and ask open-ended questions to listen to understand.
    - Follow the order of the evaluation document.
    - Don't get emotional.
    - If employee becomes angry or upset, stop the meeting, and resume the next day if you cannot refocus the individual.
1. Open your team's performance reviews under **Home** button or the **My team** drop-down menu. Access the evaluation for the meeting and walk through each section with the employee and make edits when needed.

Notice this Performance Review current step is listed at Manager Review Discussion. Select this review to complete your sections.

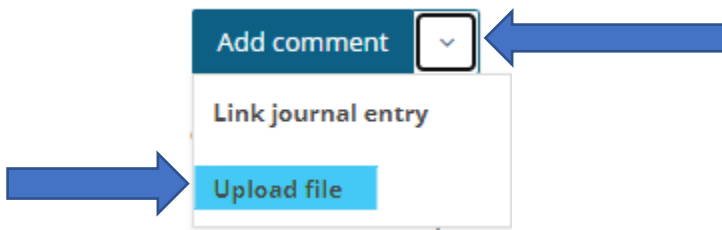
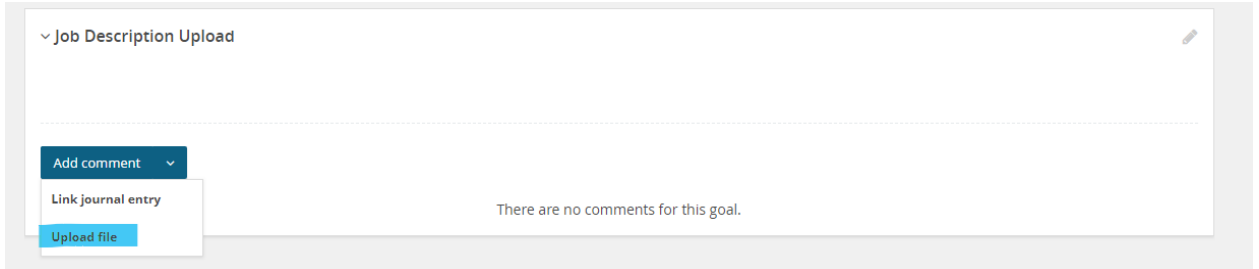


### EMPLOYEE JOB DESCRIPTION

1. Review the employee's job description and ensure it is accurate and up to date; then both parties will sign the job description and the manager will scan the job description to their OneDrive.
2. Upload the current job description in the **Overall Comments** tab.



3. In the **Job Description Upload** section, click on the arrow next to the Add comment to access the drop-down menu and click **Upload file**.



- a. Choose the employee's job description file from your computer/network. Accepted file types are

File:  No file chosen

Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png

listed.

- b. The chosen file will show then click the **Upload file** button to attach job description.

A screenshot of the 'Job Description Upload' section. The 'File:' field now shows 'Choose File' and 'Training and Organizational Development Specialist.doc' (highlighted in blue). The 'Description:' field is empty. Below the description field, the text 'Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png' is visible. At the bottom, there are two buttons: 'Upload file' (highlighted in blue) and 'Cancel'. A blue arrow points from the left to the 'Upload file' button. At the bottom of the section, the text 'There are no comments for this goal.' is visible.



- c. The Job description successfully uploaded in the **Job Description Upload** section.

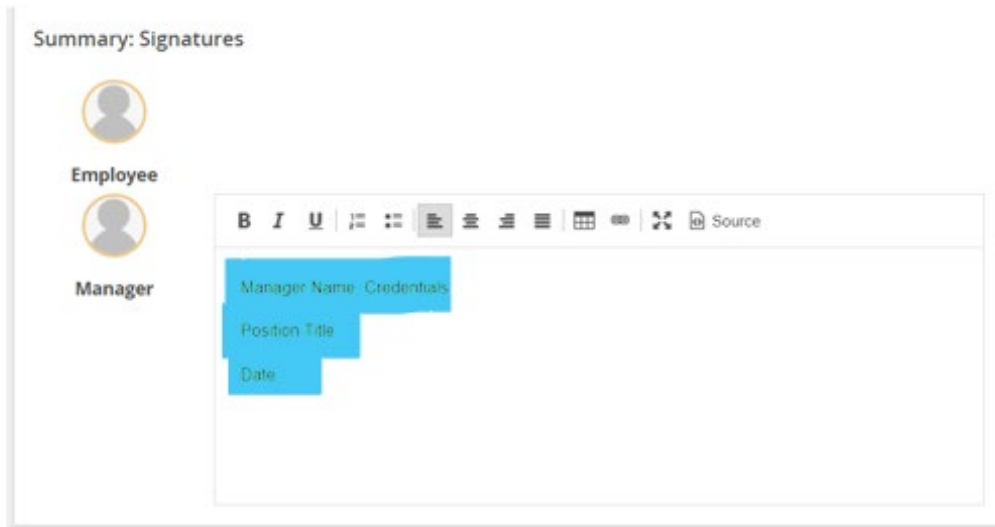


- d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete**.



## MANAGER SIGNATURE

1. At the conclusion of the discussion select the Signatures section.
  - a. Enter your name, title, credentials (ex: RN, MD, Ph.D., etc.) and date.

A screenshot of a web form titled "Summary: Signatures". On the left, there are two user selection options: "Employee" and "Manager", each with a person icon. The "Manager" option is selected. To the right is a rich text editor with a toolbar containing bold, italic, underline, bulleted list, numbered list, link, unlink, and source icons. The text area contains the following text:

Manager Name: Credentials  
Position Title  
Date

Hospital Only: For Joint Commission purposes, if you do not have the same licensure as your evaluated employee, please have a designated person (with the same licensure) also type their name, credentials, title and date below the manager's name.



2. Once you have completed the Manager Signature section, select "Next Steps" in the header to send the evaluation forward to the employee for their final comments, acknowledgement of standards of conduct and signature.



**NEXT STEPS:**

Thank you for completing the performance evaluation meeting with your employee.

Please select "Go to Next Step" (per the screenshot below)

The evaluation will be sent back to the employee to complete the Signatures, Standard of Conduct and Final Comment sections.

Your next step: Employee Acknowledges Review

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

View entire process

Overall rating

★★★★☆  
Meets expectations

Rating summary

Rating summary	Manager Performance	Employee Performance
<b>Competencies</b>		
1. Technical Knowledge and Skills	Meets expectations	Meets expectations
2. Integrity and Accountability	Needs growth	Meets expectations
3. Teamwork and Relationship Building	Meets expectations	Meets expectations
4. Problem Solving and Innovation	Meets expectations	Needs growth

Your next step: Employee Acknowledges Review

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

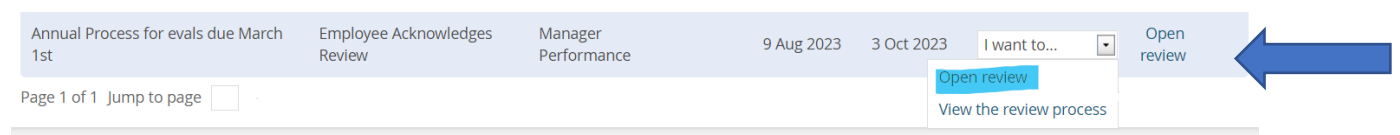
Go to next step

View entire process

## EMPLOYEE ACKNOWLEDGES REVIEW

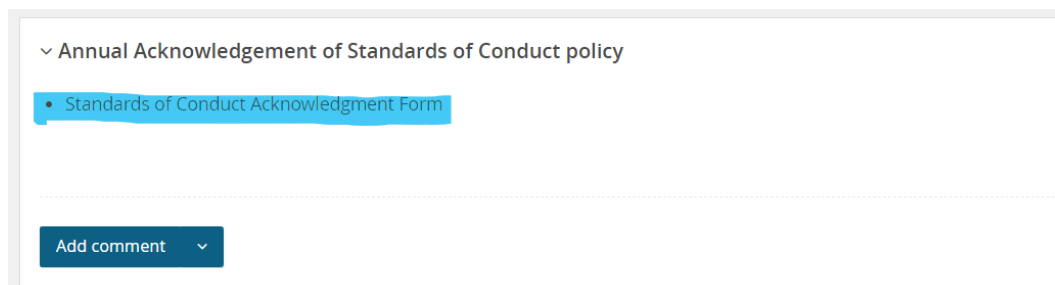
Your evaluation is in the final stage of the performance management process; the evaluation is now ready for your acknowledgment. In this step you will complete the Standards of Conduct, Signatures and add Final Comments.

1. Open the evaluation on the **Home** button or select Performance reviews under the **About me** drop-down menu.
  - a. Click on **Open Review** to open the evaluation. Or open the **I want to...** drop down menu and select **Open review**.
  - b. From the I want to... drop down menu, you will also be able to look at the review process step descriptions.



## STANDARD OF CONDUCT

1. Scroll down to the Standards of Conduct Acknowledgement Form link. Select the link and the Standards of Conduct form will open in a new browser window.




2. Enter your utad username and password into the single sign-on page.
3. Review the outlined policy then click Next to take move to electronically signing the Standards of Conduct form.

**Name of Policy: Standards of conduct**

**Policy Number: 3364-25-01**

- A. Policy statement The University of Toledo's goals of excellence are supported by a set of standards of conduct. The University seeks to encourage a safe and pleasant work atmosphere which occurs when everyone cooperates and commits to appropriate standards of conduct.
- B. Purpose of policy In compliance with the provisions of section 3345.21 of the Ohio Revised Code, the board of trustees of the University has adopted standards of conduct and makes them applicable to all persons. These rules are not intended to restrict the rights of employees, but rather to advise employees of prohibited conduct and allow the department and ultimately the University to attain its objectives in an orderly manner. Other rules are provided by statute, by Administrative Code, and by administrative procedures established by management.
- C. Scope The policy applies to all employees except to the extent the activity or conduct is specifically governed by a separate agreement or University policy.
- D. Procedure
  1. All vice presidents, deans, and other supervisors are responsible for the appropriate and consistent application of this policy. All vice presidents, deans, and other supervisors are also responsible for initiating the request for disciplinary action as soon as they are aware of a potential situation. 3364-25-01 Standards of conduct.
  2. Employees are expected to become familiar with the established rules of the University and the departments in which they work. Employees are responsible for complying with and adhering to all performance expectations, policies and procedures. Employees are expected to conduct themselves in a manner both on and off duty that does not adversely affect the ability of the employee to perform the duties of their position.  
<https://www.utoledo.edu/offices/internalaudit/pdfs/StandardsOfEthicalConductDraft.pdf>
  3. General rules of conduct and policies have been established to help achieve the objectives of this policy. The expectation is that all employees are held to the highest standards of conduct in all areas related to their employment. Inappropriate conduct of any kind, including but not limited to, disruptive, discourteous, disrespectful, abusive behavior, substandard quality of work, theft, falsifying records, failure to properly record time worked or any other behavior deemed inappropriate will be subject to disciplinary action based on the circumstances of the situation
  4. Employees should recognize that "failure of good behavior" may be grounds for disciplinary action. Failure of good behavior includes but is not limited to discourtesy to the public, absenteeism, tardiness, insubordination, inappropriate attire, and dishonesty.
  5. In the event any University of Toledo employee is convicted of any felony, the employee shall within ten (10) days notify Human Resources. Failure to notify Human Resources may subject the employee to discipline up to and including termination.
- E. Consequences if employees violate university policies (1) Disciplinary actions may impact transfers and promotions as well as other situations in which performance is a determining factor.
- F. Rights and responsibilities It is best to avoid situations that may cause a question as to your integrity or motives. Employees who witness or have knowledge of such behavior are required to immediately report it to their immediate supervisor/manager or to Human Resources. The University is committed to preventing retaliation and complaints of retaliation will be taken seriously as outlined in 3364-15-04 Non-retaliation policy.  
<http://www.utoledo.edu/policies/administration/compliance/pdfs/3364-15-04.pdf> Failure to follow university policies may result in discipline up to and including termination.

By clicking "Next" and electronically signing this form, you acknowledge that you have read and will comply with the standards laid out in this policy.




4. Type your First Name and Last Name in fillable fields, then click Sign Electronically.  
**Electronic Signature**

Please read the [Disclosure / Consent](#) before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

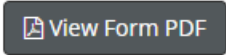
To continue with the electronic signature process, please enter your name and click the "Sign Electronically" button to save your information and submit your electronic signature.

Kimberly  Fahey



- You will get an instant notice that your form has been submitted and will also receive an email confirmation of the submitted form. You have the option to click on View Form PDF where you can download and/or print.

Thank you! Your form has been submitted.



Instant notification of submission.

Email notification of submission.

[EXTERNAL] Form submission confirmation

noreply@utoledo.edu  
To: Fahey, Kimberly



Fri 9/1/2023 3:52 PM

This is an e-mail confirmation of receipt of your Standards of Conduct recently submitted.


PLEASE NOTE: This message was automatically generated. Please do not respond to this email address: it is used only by an automated system and is not monitored for responses.

- Return to the Page Up evaluation window.
- To move to the Employee Signature steps, click Next.




## EMPLOYEE SIGNATURE

- In the Employee Signature Summary box above the manager's signature, type in your name, credentials (ex: RN, MD, Ph.D., etc.), title, Rocket # and the date.

Summary: Signatures



**Employee**

**B I U** |  |  |  Source

Rocky UToledo

Mascot

R00001234

10/3/2023



**Manager**

Melissa Studer, JD  
Director, Training and OD  
10/3/2023

- Once you have completed the Signature section, click Next or select "Next Steps" in the header.





## Final comments

### Employee Performance

**B I U** | Source

I look forward to completing my developing goals for next year.

Employee adds their **Final comments** then hit **Go to next step** to finalize.



### Overall rating

★★★★★  
Not rated

### Rating summary

#### Rating summary

Manager Performance Employee Performance

#### Competencies

Competency	Manager Performance	Employee Performance
1. Technical Knowledge and Skills	-	-
2. Integrity and Accountability	-	-
3. Teamwork and Relationship Building	-	-
4. Problem Solving and Innovation	-	-
5. Continuous Learning and Development	-	-
6. Diversity, Equity and Inclusion	-	-

### Your next step: Complete



Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

[View entire process](#)



## PRINT YOUR PERFORMANCE REVIEW

1. On the Performance Portal Dashboard, select the **About Me** drop-down and select **Completed** in the status box and hit **Search** button.
2. The completed performance evaluation will be listed on this page.
  - a. Click the **I want to...** drop down menu and select **Review report**.

Home About me Journal entry Employee Employee

### My performance reviews

Status: Complete

Review process	Review step	Hiring Manager	Role	Start date	Due date	
Annual Process for evals due March 1st	Complete	Manager Performance		31 May 2023	25 Jul 2023	I want to... View the report
Annual Process for evals due March 1st	Complete	Manager Performance		9 Aug 2023	3 Oct 2023	View the review process

- Click the **Paper icon** to open the PDF in Adobe to save and/or print **OR** hit the **Print icon** to print.

07 September 2023

## Employee Performance - Annual Process for evals due June 1st


---

**Hiring Manager:** *Manager Performance*

**1-up manager:** *One Up Manager Performance*

**Step:** *Complete*

**Completed date:** *Tuesday, 5 September 2023*




**Meets expectations**

---

Competencies

77.78 / 100%

### Technical Knowledge and Skills



Exceeds expectations

For this competency, review the summary and select the rating that best describes your performance. In the comment section, provide specific examples of how you demonstrated this competency.

- Understands the methods, procedures and technical skills needed to execute job duties.

## PRINT YOUR TEAM'S PERFORMANCE REVIEW

- On the Performance Portal Dashboard, select the **My team** drop-down and select **Completed in the status box** and hit **Search button**.
- Completed performance evaluation will be listed on this page.
  - Click the **I want to...** drop down menu and select **Review report**.

Home About me My team Create
Journal entry Manager

### My team performance reviews

Employee first name:  Employee last name:

Level:  Employee preferred name:

Status:  Review process step:

Role:

Employee	Review process	Review step	Role	Start date	Due date		
Employee Performance	Annual Process for evals due March 1st	Complete		31 May 2023	25 Jul 2023	I want to...	View report
Employee Performance	Annual Process for evals due March 1st	Complete		9 Aug 2023	3 Oct	View the report	View report
Employee Performance	Annual Process for evals due June 1st	Complete		5 Sep 2023	30 Oc	View the review process	View report
Employee Performance	Annual Process for evals due March 1st	Complete		5 Sep 2023	30 Oc	Create a follow on review	View report
						View the development plan	View report

- Click the **Paper icon** to open the PDF in Adobe to save and/or print **OR** hit the **Print icon** to print.





07 September 2023

## Employee Performance - Annual Process for evals due June 1st

**Hiring Manager:** *Manager Performance*

**1-up manager:** *One Up Manager Performance*

**Step:** *Complete*

**Completed date:** *Tuesday, 5 September 2023*



Meets expectations

### Competencies

77.78 / 100%

#### Technical Knowledge and Skills



Exceeds expectations

For this competency, review the summary and select the rating that best describes your performance. In the comment section, provide specific examples of how you demonstrated this competency.

- Understands the methods, procedures and technical skills needed to execute job duties.

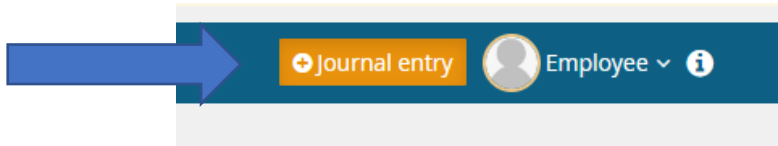
## JOURNAL ENTRY

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

Add Journal entry ✕

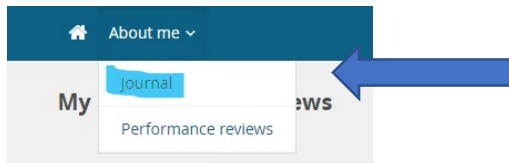
Journal title


Journal entry

Add

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.

Create journal entry ✕

Title


Training material

Content

Quarterly has produced 5 new trainings to offer our employees.

Tags

Kimberly Employee <sup>Ⓞ</sup> Add a tag

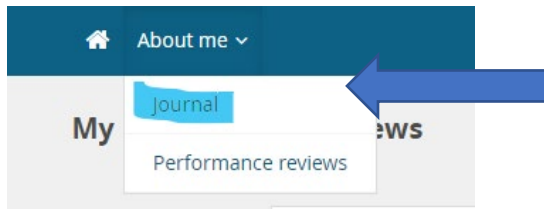
 Done

c. Click **Done** to save.

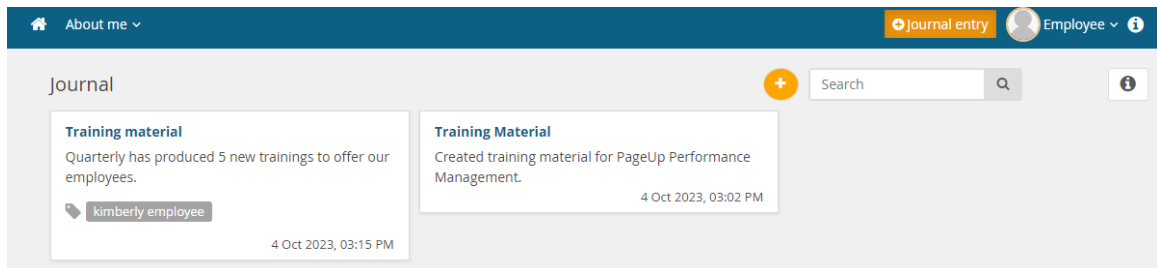
## ACCESSING JOURNAL ENTRIES

Finding your journal entries is simple:

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



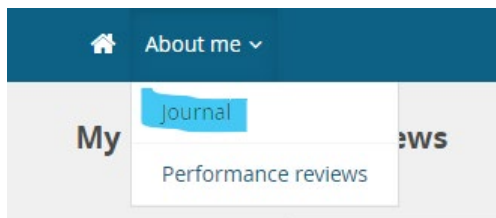
2. Browse the list of entries or click the Search field to enter text to locate the required entry by title, content, or tag.
3. Click the magnifying glass icon to load any results.



## 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.

---