PERFORMANCE REVIEW

TRAINING MANUAL

TRAINING AND ORGANIZATIONAL DEVELOPMENT

University of Toledo, Human Resources

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THE UNIVERSITY OF TOLEDO | Human Resources

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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 Performance Ratings and Self-Evaluation Questions
- Duration to complete 18 days.

Step 2: Manager Evaluation and Manager Discussion
- Complete Performance Ratings, reviews and can make comments on the Employees Self-Evaluation Questions and sets Goals & Objectives for the coming year.
- If you employee supervises other complete the Leadership Competency.
- Conversation with employee to finalize review and add any final comments.
- Upload the employee's signed job description.
- Manager signs review off on the review.

Step 3: Employee Acknowledges Review
- Employee signs review and adds any final comment.

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.

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.

The University of Toledo

Sign in with your organizational account

Username
Password

Sign in

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.

STEP 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 and your performance objectives. 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.

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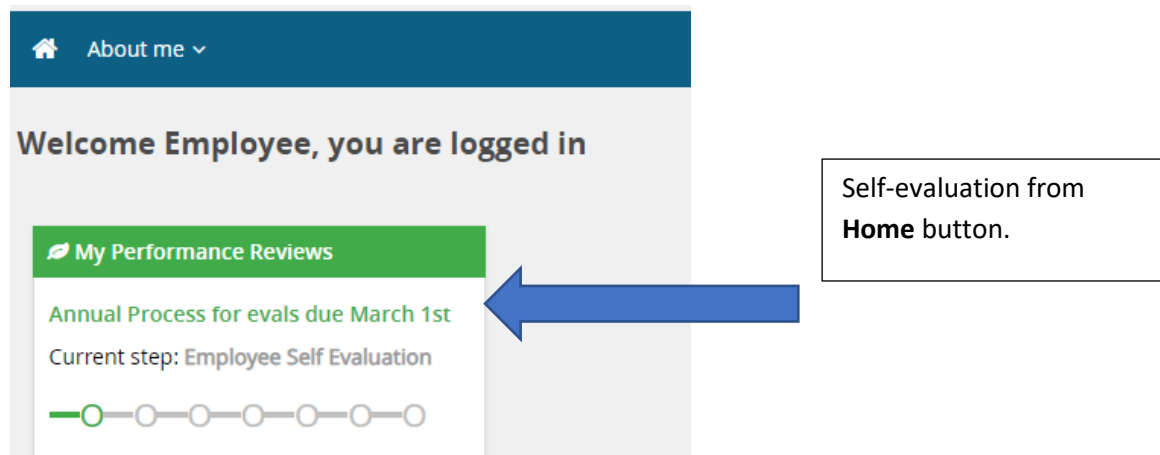
2. Current performance evaluation will be listed on this page.
    a. Click on **Open Review** to open the evaluation. Or open the **I want to**…drop down menu and select **Open review.**
    b. From the I want to…drop down menu, you will also be able to look at the review process step descriptions.

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.**

    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.

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

Start	Step 1&2: Performance Rating	Step 1&2: Self Evaluation Questions	Step 2: Goals and Objectives	Step 2: Job Description
Step 2: Leadership Compentency	Step 2: Manager Signature	Step 2&3: Overall Comments	Step 3: Employee Signature	Next steps

5. During the Employee Self-Evaluation the employee will complete the **Performance Ratings snd Self-Evaluation Questions.** 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.

PERFORMANCE RATINGS

Performance objectives are observable and measurable skills and behaviors that contribute to workplace effectiveness and career success. In this section you will rate each performance section utilizing the star system and include specific comments. There are nine performance objectives to rate 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 performance and/or behavior 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 performance and/or behavior expectations. Notable and excellent contributions are widely recognized in the organization.

1. For each performance objective, 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 performance objective. To provide comments, select the **blue "Add Comment" button**.

   ⌄ **Technical Knowledge and Skills**

   For this objective, review the summary and select the option that best describes your performance. In the comment section, provide specific examples of how you demonstrated this performance. (Clinical and Ancillary Departments will separately conduct competency assessments Core and Ongoing for new and existing Employees)

   - 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
   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.

   Add comment ⌄

   There are no comments for this goal.

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

   ⌄ **Technical Knowledge and Skills**

   For this objective, review the summary and select the option that best describes your performance. In the comment section, provide specific examples of how you demonstrated this performance. (Clinical and Ancillary Departments will separately conduct competency assessments Core and Ongoing for new and existing Employees)

   - 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

   ★★★★ Not rated

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

   Save & Share   Save as Draft   Cancel

   There are no comments for this goal.
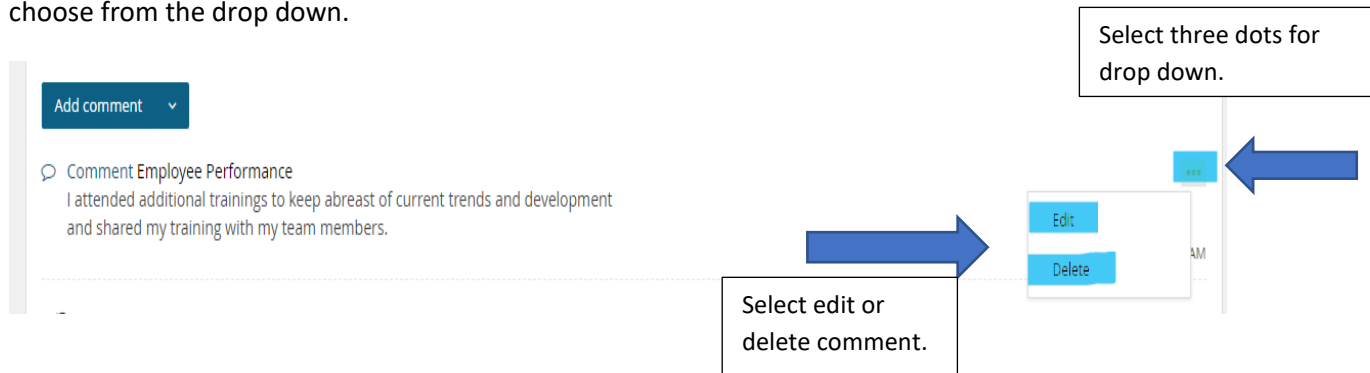
   a. **Save and Share.** This button ensures that any comment made will be saved and viewable upon the final report. Any comments shared will move forward when the review moves to the Manager Evaluation and Performance Discussion step. Comments won't be shared until that date.
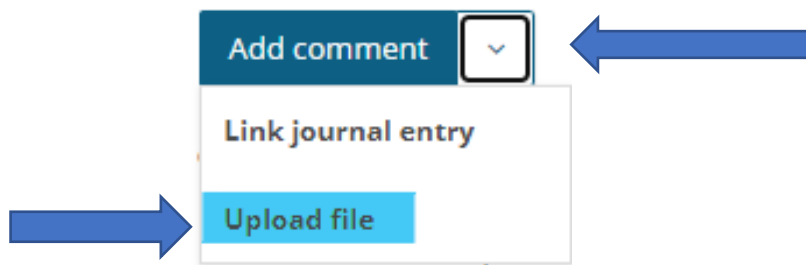
b. You may also use **Save as Draft** if you wish to return to the comment at a later time. **Note:** Your comments will not be viewable by the supervisor unless you select "Save and Share.". You will see the following message:
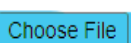
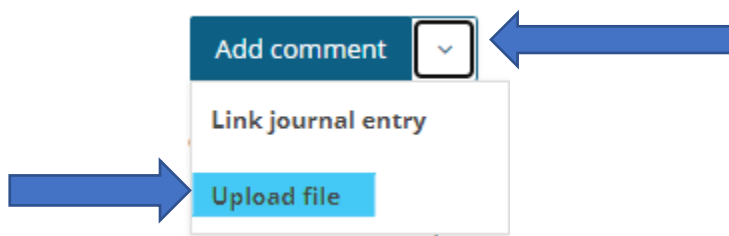💬 Draft comment *visible only to me*

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.

Select three dots for drop down.

Add comment ⌄

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

Edit

Delete

AM

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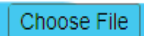
4. You may also **Upload a File** to supplement your comment.
    a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file.**

Add comment ⌄

Link journal entry

Upload file

    b. Choose your file from your computer/network. Accepted file types are listed below. 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
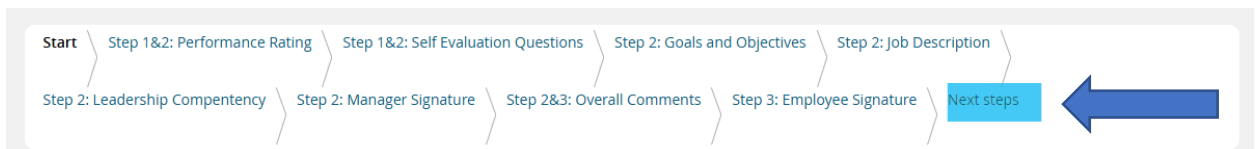
c. The link for the file will be above completed comments.

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

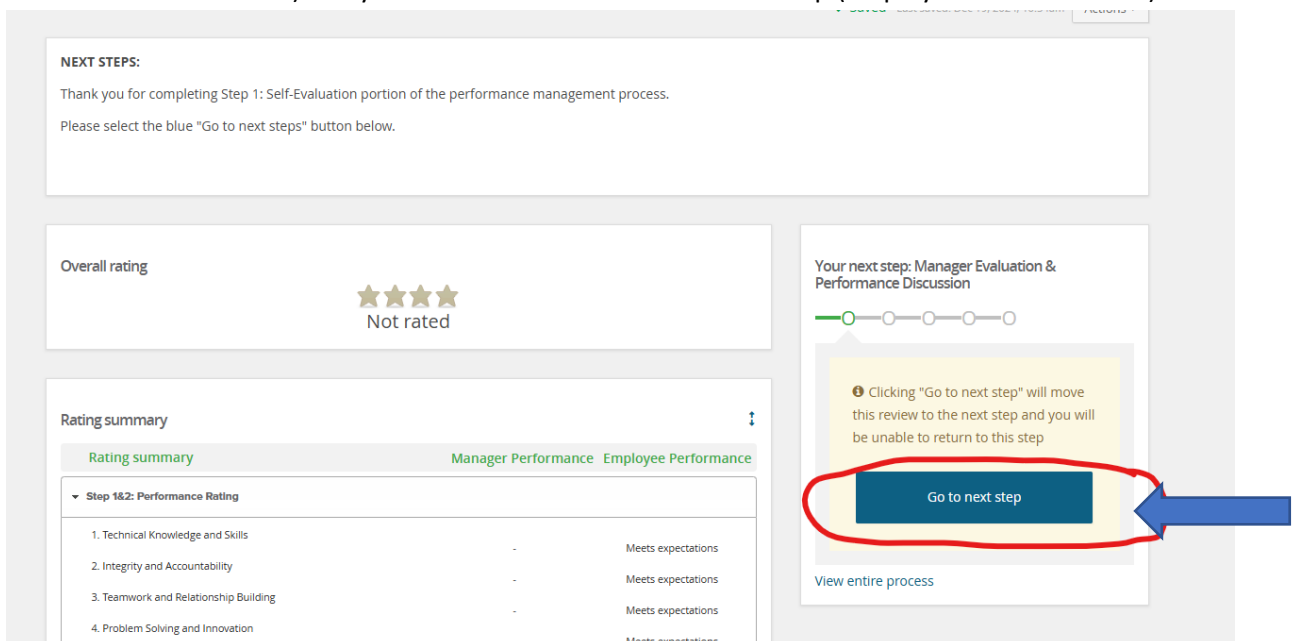5. After completing all Performance Ratings, your average of all ratings will show at the bottom of the page in the **Summary: Step 1&2 Performance Rating**
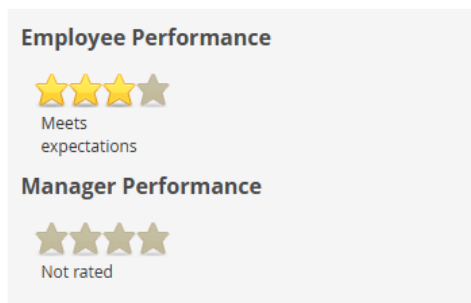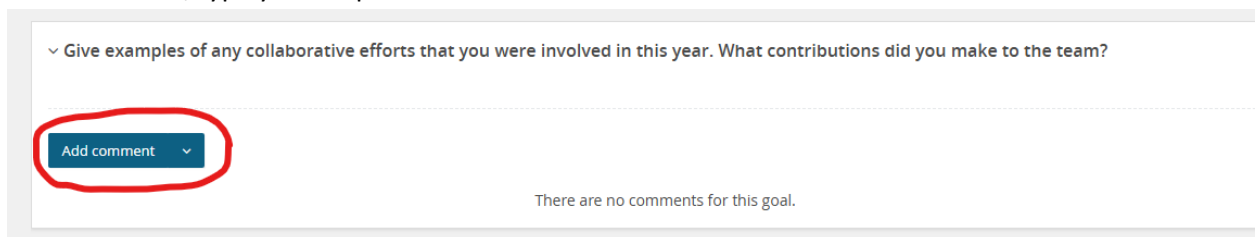
6. Click the **Next** button to move through the review form, to Self-Evaluation Questions.

SELF-EVALUATION QUESTIONS

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

1. Give examples of any collaborative efforts that you were involved in this year. What contributions did you make to the team?
2. List any development activities that you participated in during this appraisal period.
3. What kind of support and/or guidance would you like to see from your supervisor in the next year?
4. How can the University support your efforts to create work-life harmony?
5. List any development activities that would interest you during the next appraisal period.
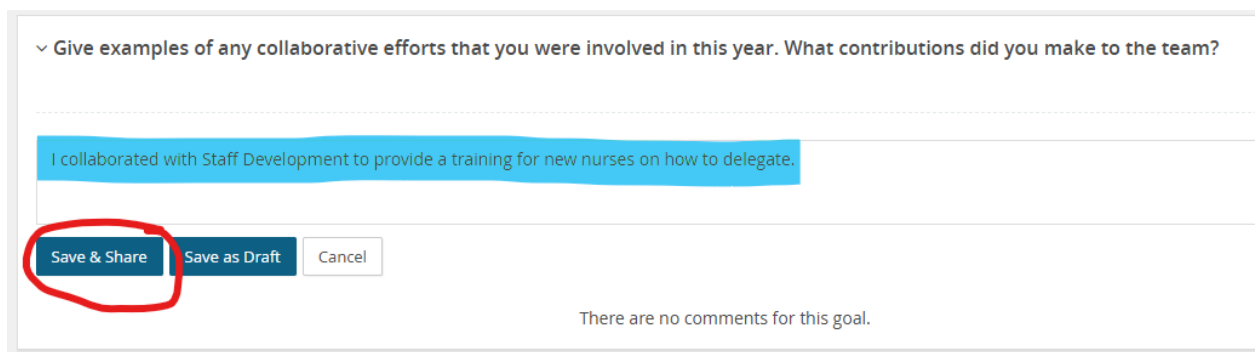
1. Review each question and provide specific examples that best describes your performance in the comment section.
   a. To provide comments to the Self-Evaluation questions, select the blue **"Add Comment"** button, type your response.

   ⌄ Give examples of any collaborative efforts that you were involved in this year. What contributions did you make to the team?

   Add comment ⌄

   There are no comments for this goal.
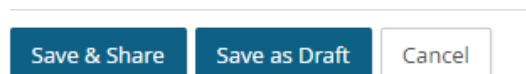
   ⌄ Give examples of any collaborative efforts that you were involved in this year. What contributions did you make to the team?

   I collaborated with Staff Development to provide a training for new nurses on how to delegate.

   Save & Share   Save as Draft   Cancel

   There are no comments for this goal.

   b. There are two ways to save your comments:

   Save & Share   Save as Draft   Cancel

   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.

   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.**

Delete   AM

3. After completing the Self-Evaluation Questions, click the **Next** button to move through the review form, to Next Steps or hit the **Next Steps tab** at the top of the page.

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.

Start	Step 1&2: Performance Rating	Step 1&2: Self Evaluation Questions	Step 2: Goals and Objectives	Step 2: Job Description
Step 2: Leadership Compentency	Step 2: Manager Signature	Step 2&3: Overall Comments	Step 3: Employee Signature	Next steps

1. Please select "**Go to next steps**" button to move this review to the next step (Manager Evaluation & Performance Discussion) and you will be unable to return to this step (Employee Self-Evaluation).

NEXT STEPS:

Thank you for completing Step 1: Self-Evaluation portion of the performance management process.

Please select the blue "Go to next steps" button below.

Overall rating

★★★★
Not rated

Your next step: Manager Evaluation & Performance Discussion

ℹ 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

Rating summary		↕
Rating summary	Manager Performance	Employee Performance
▾ Step 1&2: Performance Rating		
1. Technical Knowledge and Skills	-	Meets expectations
2. Integrity and Accountability	-	Meets expectations
3. Teamwork and Relationship Building	-	Meets expectations
4. Problem Solving and Innovation	-	Meets expectations

STEP 2: MANAGER EVALUATION & PERFORMANCE DISCUSSION

Completing a performance review is an important opportunity to evaluate your employees' accomplishments as well as their opportunities. The Manager Evaluation and Performance Discussion 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 each objectives during the time period and provide comments to support rating given.
- Set SMART goals and expectations for the coming year.

During this step you will complete these sections of the review:

- **Performance Rating tab:** Rate the employee's performance and provide clear explanations in each comment box.
- **Self-Evaluation Question tab**: Review the employee's comments (if applicable) you may add your own comments as needed.
- **Goals & Objectives tab:** Create goal(s) for next year based on department goals, performance and/or professional development opportunities.
- **Job Description tab:** Review and upload the employee's signed job description.
- **Leadership Competency tab:** Complete only for those who supervise employees.
- **Overall Comments tab:** Comment on the employee's overall performance.
- **Signature tab:** Sign review after performance discussion.

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, performance 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:

Welcome	Welcome the employee and ask: • How did you see your performance over the last year? • What were some of your significant accomplishments? • What didn't quite go as planned? What happened, and what did you learn?
Discussion	Discuss performance ratings and discussion questions from the evaluation, both accomplishments and challenges.
Goals	Work together to set goals for the next year and assist with resources for performance development. • What do you need from me to be successful this coming year?
Finalize	Make any changes to the evaluation as discussed in the meeting, upload the signed job description, sign the evaluation and send to employee.
Follow-up	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.

After completing the Manager Evaluation and Performance Discussion, select the "**Next Steps**" tab. In the "**Next Steps**" tab, scroll to the middle of the page on the right hand side select the blue "go to next step" button to send your evaluation to Step 3: Employee Acknowledgement.

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 & Performance Discussion.

Steps below provide guidance to complete the online Manager Evaluation & Performance Discussion.

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 & Performance Discussion 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.
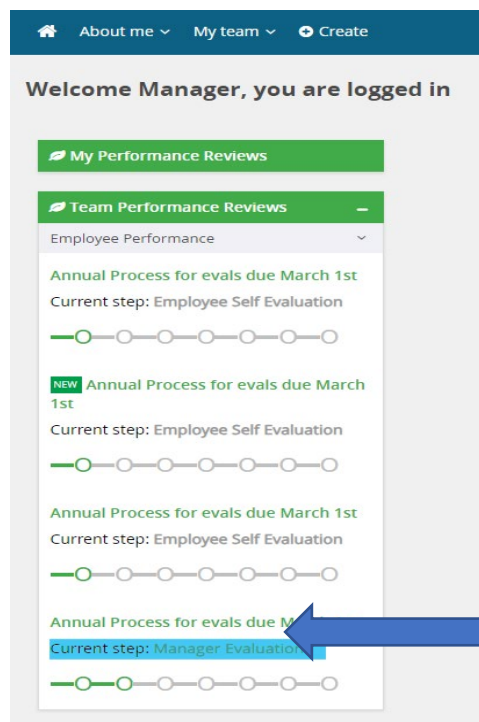
Manager evaluation from **Home** button.

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.

PERFORMANCE RATING

Performance objectives 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 performance objective utilizing the star system and include specific comments. There are nine performance objective to rate 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 Performance Ratings 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 Performance Ratings expectations. Notable and excellent contributions are widely recognized in the organization.

1. For each performance objective review the performance 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 Performance Ratings, 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 performance objective. To provide comments, select the **Add Comment** button.

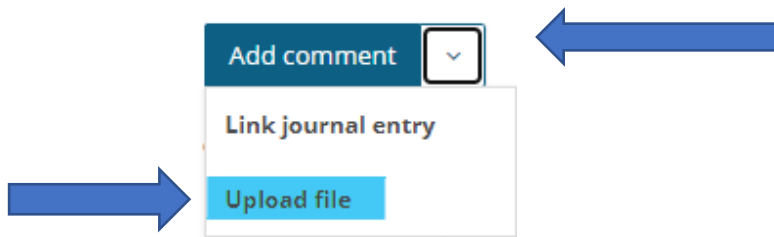2. After adding your comments there are two ways to save your comments.

    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:
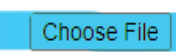

3. To **Edit** or **Delete** comments, select the **three dots** on the top right-corner. You will be able to then choose from the drop down.

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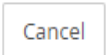   a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file.**

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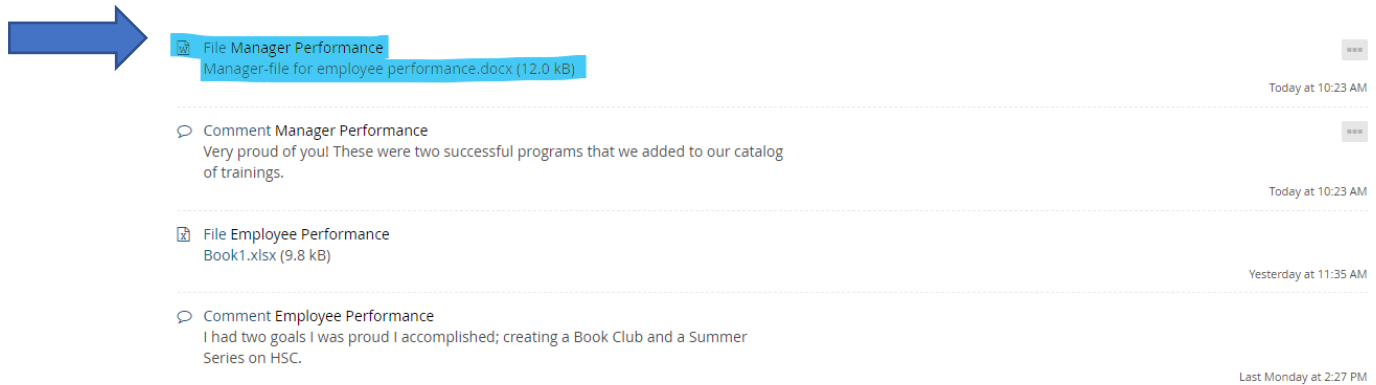

   c. The link for the file will be above completed comments.

   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 performance ratings, the manager's average of all ratings of the employee will show at the bottom of the page in the **Summary: Step 1&2 Performance Rating**
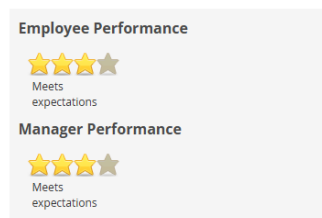
6. Click the **Next** button to move through the review form, to Self-Evaluation Questions.

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:

1. Give examples of any collaborative efforts that you were involved in this year. What contributions did you make to the team?
2. List any development activities that you participated in during this appraisal period.
3. What kind of support and/or guidance would you like to see from your supervisor in the next year?
4. How can the University support your efforts to create work-life harmony?
5. 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.**

[Add comment ⌄]

Link journal entry

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.

File Manager Performance
Manager-file for employee performance.docx (12.0 kB)

Today at 10:23 AM

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

Today at 10:23 AM

File Employee Performance
Book1.xlsx (9.8 kB)

Yesterday at 11:35 AM

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

Last Monday at 2:27 PM

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

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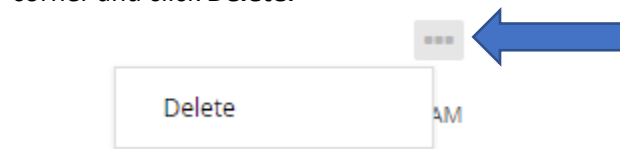
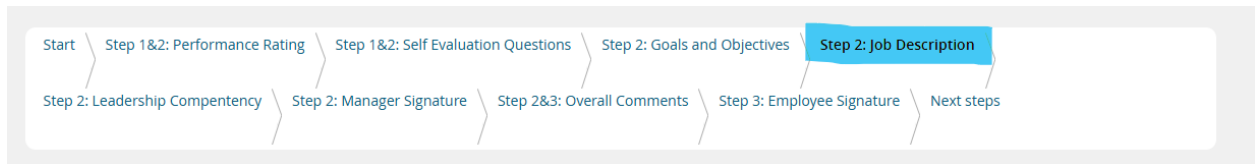3. After reviewing and adding any comments or files to the Employee's Self-Evaluation Questions, click the **Next** button to move through the review form, to Goals and Objectives.

GOALS AND OBJECTION

Created SMART goals to review with the employee. This can be a shared step where both the employee and manager create goals for the year aligning with the University's Strategic plan, department and/or position objectives and self-development.

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

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.

1. **Specific** - What is the goal? What do I want to accomplish with this goal?
2. **Measurable** – How will I measure my progress? How will I know I have accomplished the goal(s)?
3. **Achievable** – Do I have the skills and the resources for it? Is achieving this goal realistic with effort and commitment?
4. **Relevant** – Why is this goal important to my development?
5. **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

- 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.

Hit icon to delete.

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.

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

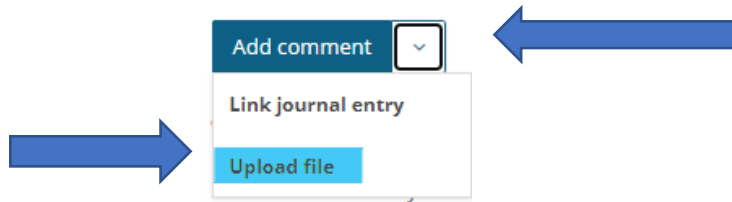   a. There are two ways to save your comments:
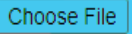
[Save & Share] [Save as Draft] [Cancel]

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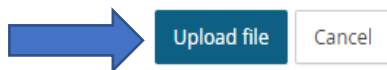   a. Click on the arrow next to Add comment to access the drop-down menu and click **Upload file.**

[Add comment ⌄] ⬅

Link journal entry
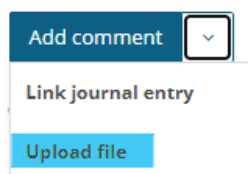
Upload file

b. **Choose file** from your computer/network. Accepted file types are listed. Click the **Upload file** button.
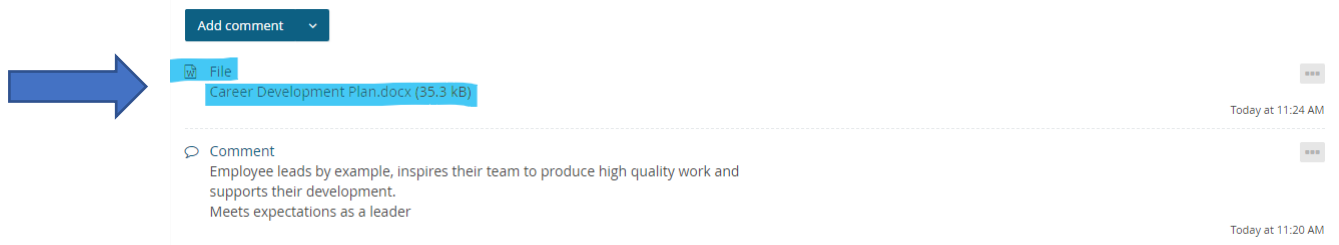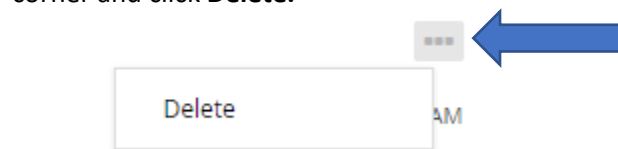
File: Choose File No file chosen

Description:

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

Upload file   Cancel

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
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.
Today at 10:38 AM

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

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

Delete

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

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 **Step2: Job Description** tab.

Start	Step 1&2: Performance Rating	Step 1&2: Self Evaluation Questions	Step 2: Goals and Objectives	Step 2: Job Description
Step 2: Leadership Compentency	Step 2: Manager Signature	Step 2&3: Overall Comments	Step 3: Employee Signature	Next steps

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

listed.

b. The chosen file will show then click the **Upload file** button to attach job description.
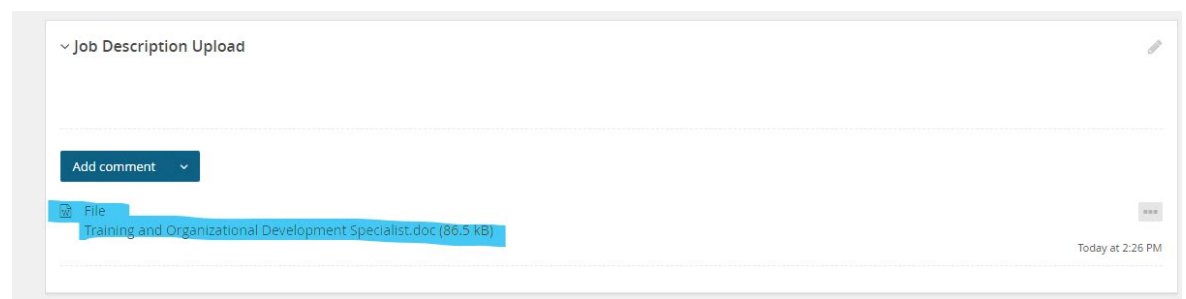
c. The Job description successfully uploaded in the **Job Description Upload** section.

d. You may remove the file if you choose by clicking on the **three dots** in the right-hand corner and click **Delete.**
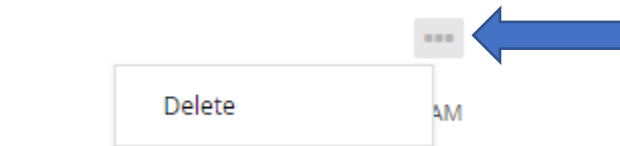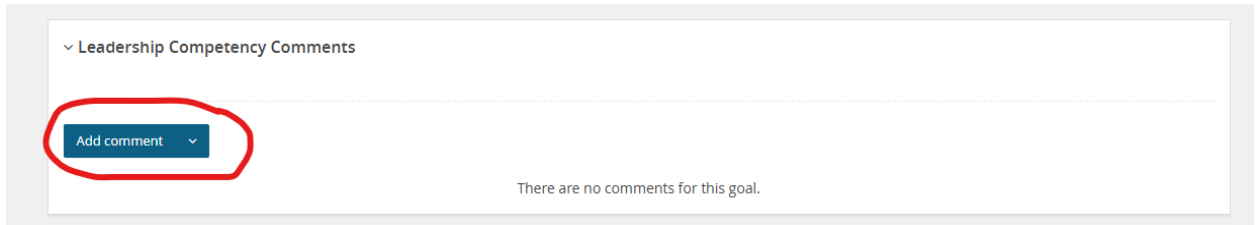
LEADERSHIP COMPETENCY (FOR THOSE WHO SUPERVISE ONLY)

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 definition:
    o Utilizes appropriate interpersonal styles and methods to inspire and guide employees toward goal achievement.
    o Develops and cultivates a high performing team.
    o Recognizes staff contributions and effectively resolves conflict.

Include any comments regarding the employee's leadership competency for the appraisal period. Please include any specific examples of achievements/accomplishments, challenges, etc.

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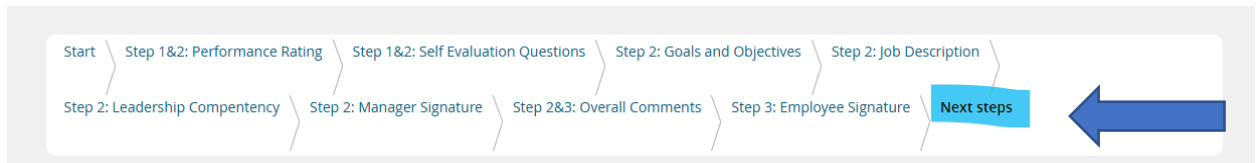

2. There are two ways to save your comments:

   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:

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.

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.**

MANAGER SIGNATURE

1. At the conclusion of the discussion select the **Manager Signatures** section.
   a. In the Manager Name & Credentials use the Add comment to type your name and credential then the next box, Manager Title, use the Add comments button to type your title.

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. Hospital only: Only complete if you are required to have an extra accessor. Use the Add comment to type in extra accessor's name, credentials, title and date.

1. Once you have completed the **Manager Signature** section, select **"Next Steps"** in the header to send the evaluation forward to the **Overall Comments** tab.

OVERALL COMMENTS

1. Provide any final comments regarding the annual performance review. By selecting the Add comment box, typing in comment and selecting Save & Share for the employee to see.

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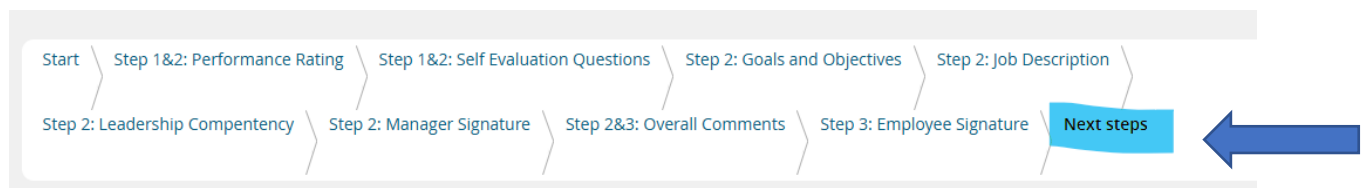
2. Please select "**Go to next steps**" button to move this review to the next step (Employee Acknowledgment) and you will be unable to return to this step (Manager Evaluation & Performance Discussion).

NEXT STEPS:

Thank you for completing Step 2: Manager Evaluation and Performance Discussion portion of the performance management process.

Please select the blue "Go to next steps" button below.

Overall rating

⭐⭐⭐⭐
Meets expectations

Your next step: Employee Acknowledgement

—O——O——O——O——O

ℹ 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

Rating summary   ⇕

Rating summary	Manager Performance	Employee Performance
▼ **Step 1&2: Performance Rating**		
1. Technical Knowledge and Skills	Meets expectations	Meets expectations
2. Integrity and Accountability	Meets expectations	Meets expectations
3. Teamwork and Relationship Building		

STEP 3: 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 add any Overall Comments and complete the Employee Signature tab.

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.

Annual Process for evals due March 1st	Employee Acknowledges Review	Manager Performance	9 Aug 2023	3 Oct 2023	I want to... ▾	Open review

Page 1 of 1 Jump to page [   ]

Open review
View the review process

OVERALL COMMENTS

1. Employee can provide any final comments regarding your annual performance review. By selecting the Add comment box, typing in comment and selecting Save & Share for the manager to see.

2. Once you have completed the **Overall Comment** section, select **"Next Steps"** in the header to send the evaluation forward to the **Employee Signature** tab.

EMPLOYEE SIGNATURE

1. Place your Name & Credentials and Title in the Employee Comments below.

    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.

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

FINALIZE YOUR EVALUATION

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

2. Please select "**Go to next steps**" button to complete this review.

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.**

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

PRINT YOUR TEAM'S PERFORMANCE REVIEW

1. On the Performance Portal Dashboard, select the **My team** drop-down and select **Completed in the status box** and hit **Search button**.
2. Completed performance evaluation will be listed on this page.

a. Click the **I want to**…drop down menu and select **Review report.**

3. 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.
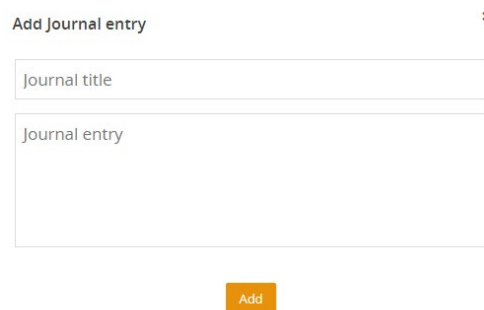
CREATING JOURNAL ENTRIES

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.
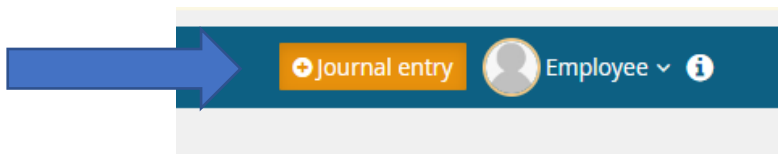
   a. This is a quick access tool. The journal entry screen will pop up.
   b. Enter the following:
      i. Title – a quick reminder of the information you want to capture.
      ii. Content – details of the entry
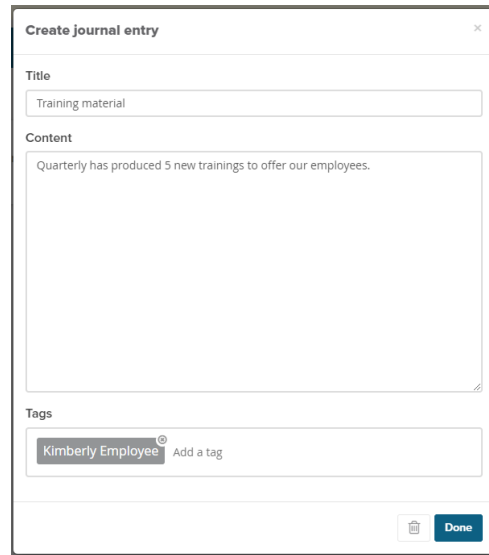
      iii. Click **Add** to save.
2. For a slightly more robust entry, click About me, then Journal.
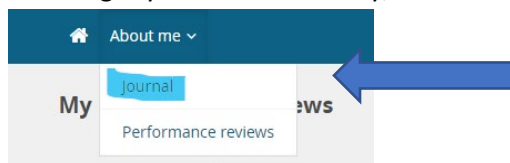
   a. Click the **+** (plus) icon
   b. In the Create journal entry pop up, enter the following:
      i. Title – a quick reminder of the information you want to capture.
      ii. Content – details of the entry
      iii. Tags – Tags are ways to categorize journal entries and can be used to group related 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.
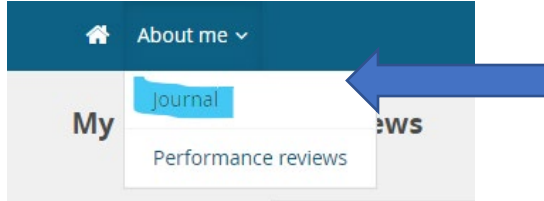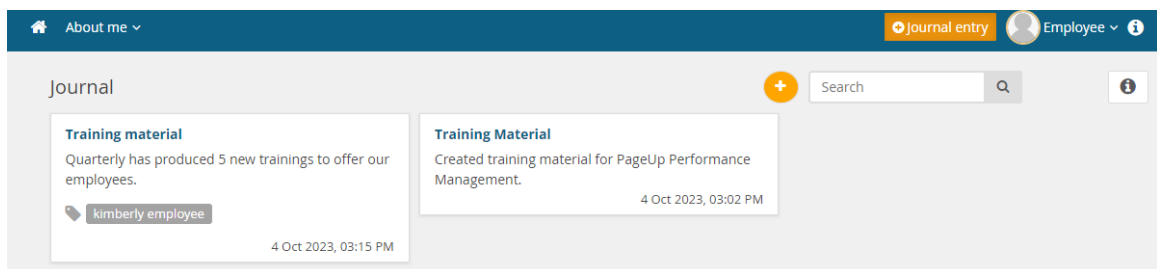

c.   Click **Done** to save.

ACCESSING JOURNAL ENTRIES

Finding your journal entries is simple:
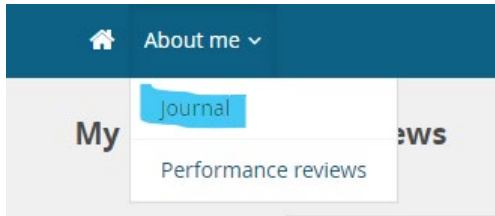
1.   Click **About Me**, then **Journal.**

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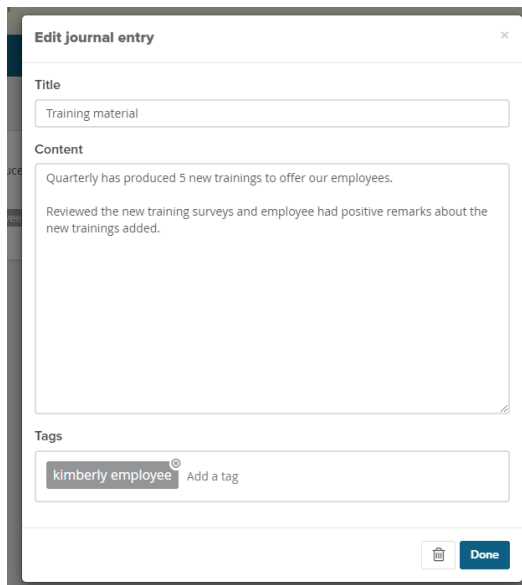
3.   Click the magnifying glass icon to load any results.

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.
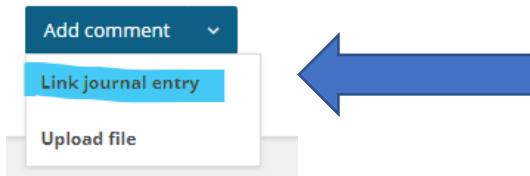

5. Click Done

USING JOURNAL ENTRIES IN A PERFORMANCE REVIEW

Employees and managers may attach Journal entries to a performance review during the evaluation process.
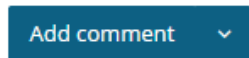
1. When completing an evaluation, you will see an Add comment drop-down box in each of the sections. Click on Link journal entry.

2. Journal entries will be listed, or you may use the **Search** function to enter in a title, key word or tag.
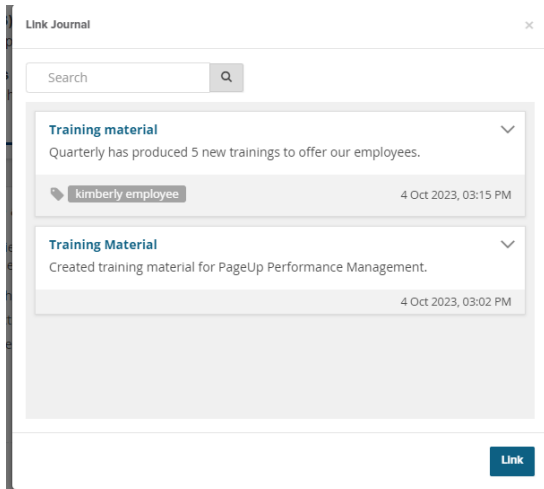
3. Select which entry you wish to attach and click **Link.**

4. The entry is now attached to the evaluation and will be visible for the employee and manager.