Target date should be used to reflect a short term duty or objective. Otherwise, it should reflect the final review date. Ex: Oct 1, 2018

Comments saved as private need to be published in the ‘End of Year – Supervisor’ or ‘Employee Review – Final Rating’ step in order for all parties to see the comments. This can be accomplished by selecting the comment, then selecting ‘Publish’ from the pull-down menu. Otherwise, use ‘Save & Share’ so your supervisor can see all of your comments at any time.
Getting Started

https://thecitadel.pageuppeople.com
Log into the PageUp Portal using your Windows credentials.

Employee can view their own performance plan by selecting “My Performance Reviews”.

If you are a supervisor, you will have the additional “Team Performance Reviews” box shown left. This box should list all direct reports (Classified Staff only at this time) and the current step for the review. Select an employee to begin.

KEY CHANGES FROM LAST YEAR:

- Job duties attribute to 80% of the performance review.
- Objectives attribute to 20% and have default measures for employees and supervisor. For all employees, mandatory training must be completed on time. Additionally, supervisors will be scored on their timeliness completing performance reviews for their direct reports.
- No more printing. Submitted directly to Human Resources.
- No more Reviewer (the supervisor’s supervisor) signoff, instead they have access to view the performance plan/review at any time during the review period.
Next, select “Job Duties” from the menu bar.

Attention Supervisor,

It’s now time to prepare the performance plan for Wesley Sams.

Things for you to do:

1. Consider what performance items you’d like the employee to focus on in the upcoming performance period.
2. Organize a meeting with your employee to discuss their new performance plan.
3. Once you have created and the employee has approved the new plan, it moves to the feedback/communication stage. You have successfully completed the performance plan.
4. Remember to check in throughout the performance period to provide notes and helpful feedback for your employee.
Job duties should be related to the job duties found on an employee’s position description. The job duties portion of the review constitutes 80% of the final rating. The weight should also reflect the percentage of time indicated on the position description.

How to:

1) Create the job duty in the “Measure” box.
2) Create the success criteria for the job duty in the same “Measure” box. Use “SC:” or “Success Criteria:” to denote the change. (See example)
3) Enter the weight associated with this job duty.
4) Scroll to enter in next job duty.

Leave “Status” as current and “Target date” as is.
You can attach any instructional content if needed, but it is not required. You can create up to five job duties to rate against.

Select “Next” located in the lower right side of the page to advance to the objectives page.
Create the objectives for the employee. Objectives should be something related to the employee’s job, when achieved should help the employee perform their job better. Some examples are special training or certificates of achievement in areas related to job duties. The objectives portion of the review constitutes 20% of the final rating and allows up to two objectives, although the following default objectives are required for each:

- ALL EMPLOYEES will have one objective that states they have completed all mandatory training by their due date.
- ALL SUPERVISORS shall also be rated on the timeliness of their completion of performance reviews for all direct reports.

Select “Next” located in the lower right side of the page to advance to the objectives page.
Create performance characteristics for qualities important to the employee’s position. A list of examples can be found by clicking the “here” link below. A typical planning stage may include up to three performance characteristics. These are not required and have no affect on the final rating, but can be helpful for an employee.

Select “Next” located in the lower right side of the page to advance to the objectives page.
PageUp Performance: Next Steps

This final page summarizes the employee’s performance plan. Please remember, job duties must add up to 80% and objectives must total 20%. If they do not add up properly, you will receive the alert box shown below in red. Simply select “Resolve” to fix the math.

Once resolved, a “go to next step” button will now be available. Be sure the plan is how you want it before pressing the button. Once pressed, the plan is submitted and the employee is notified via email the plan has been created.
PageUp Performance: Employee Approval

The employee is notified when the supervisor has completed the planning stage. The employee can make comments and/or suggestions for the plan, OR simply select “Agree” to move the plan into the “Communication/Feedback” stage of the review process.

The employee can navigate thru the plan by selecting the item they wish to view.

If the employee adds any comments and selects “Agree”, the supervisor will be notified and must return to the plan. The supervisor can now consider the comments added by the employee, add comments of their own, or simply “Agree”. The performance plan will move to the next stage once the supervisor AND employee “Agree”.

Your next step: Communication/Feedback

Approval
You must approve the performance plan before moving to the next step.

Notify [Name] after you approve

[Name] has not approved this review

[Name] agrees
PageUp Performance: Communication/Feedback

The Communication/Feedback period normally begins after the initial signoff has occurred to approximately one month before the performance review is due. Upon which, the employee is notified their performance review date is approaching and can add supporting documentation.

During this period, the employee, as well as the supervisor, can attach support documentation for items listed on their performance plan. There are three methods available to the users:

1) Journal entry – User can associate emails, documents, and any other correspondence with their review. The supervisor can then access these items upon rating the employee.
2) My Progress – User types in notes and can upload supporting documentation.
3) Comment box – Used to add comments regarding the different aspects of the job duty.
PageUp Performance: Employee Input

The employee is notified of their upcoming review date. The employee may then access the plan and make any notes for the supervisor. The employee may also take the opportunity to attach supporting documentation to assist their supervisor when completing their performance review.
PageUp Performance: Supervisor Review

The supervisor can now rate the employee for the items on the performance plan, add comments, and attach any supporting documentation they may want to include. Any support documentation added by the employee should be considered at this time.

Select a rating:

- 0 stars = Unsuccessful
- 3 stars = Successful
- 4 stars = Exceeds

Add comments:

Link Journal Item:
- Carolyn
- Robert

Job Duty 1...
- Current
- Continue meeting with departments to discuss their needs regarding records that need to be retained and inventoried.
- SC: As departments look to imaging, schedule meeting times and provide retention schedule information to supervisors.

Weight: 20%  Target date: 01 Oct 2016
Development activities for this item: Add
PageUp Performance: Employee Review

The employee can now view their final performance and add any notes or final comments.

Wesley

Just making a comment....

Robert

Fine with me. So, we'll train to not add comments if they agree.
The performance review is now complete. No need to print a copy, it is submitted to Human Resources electronically. Beginning next September, you will see a plan initiated for the upcoming review period even if you have not completed the current year. This way, you can go over both the current year evaluation and the upcoming plan with your employee.

If you have any questions, please contact Bob Line in Human Resources at liner@citadel.edu or 3-7057.
PageUp Performance: View a Completed Review

To view a completed performance review, log into PageUp and select the ‘About me’ link from the menu bar. Next, select ‘Performance reviews’ from the pull-down menu.

If you have any questions, please contact Bob Line in Human Resources at liner@citadel.edu or 3-7057.
Next, set ‘Status’ to Complete and press ‘Search’. Use the appropriate pull-down menu and select ‘View the report’.

If you have any questions, please contact Bob Line in Human Resources at liner@citadel.edu or 3-7057.