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| The review process includes the following steps (listed in order)  *When applicable, emails from the system will specify end dates* | |
| *Step Name* | ***Approx. Timeframe*** |
| START/1st Quarter Update | March - April |
| [2nd Quarter Update](#QtrlyUpdate) | July |
| [3rd Quarter Update](#QtrlyUpdate) | October |
| [4th Quarter & Prepare for End of Year Evaluation](#FourthQtr) | Mid-December –  Mid-January |
| End of Year Evaluation  (Supervisor Rating) | Mid-January –  Mid-February |
| [Review Sign Off](#SignOff) | Mid-late February |



*Click* [](https://www.youtube.com/playlist?list=PLCiwUBl4sSdihyJfVqz0q_o2vYIeXiywD) *or scan this QR code to access* ***video tutorials****:*

[](https://www.youtube.com/playlist?list=PLCiwUBl4sSdihyJfVqz0q_o2vYIeXiywD)

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| ***System Access & Navigation*** | |
| **Login**  Visit <https://lehighes1.pageuppeople.com> to access the PageUp system.  *Login using your Lehigh SSO user name and password.*    Disable your internet browser pop-up blocker if needed. |  |
| **Accessing Current and Completed Forms**  Under the***About Me*** menu, select***Performance Reviews****.*  Change status to ***All*** and click ***Search***  Locate the review you want to access   From the *“****I want to”***drop down:   * Click ***Open review***, which will open the *current* review form in a new window   OR   * Select ***View the report*** to view, print, or download a PDF of a completed review |  |
| **Accessing Current and Completed Forms, Cont’d.**  Or, access your current performance review from the Home Page by clicking the link in the green ***My Performance Reviews*** section. |  |
| **Navigation Bar (Section Types)**  Click on a Section Type **Title** to access a section  -or- Click the **Next** button at the bottom of the page to move to the next section type     |  |  | | --- | --- | |  |  | | Start | Introductory/informational page to review at the beginning of each step | | Responsibilities & Ratings | Section for storing and rating your key accountabilities (PD), goals, Lehigh’s Core Success Factors, and Lehigh’s Managerial Success Factors (when applicable) | | Quarterly Notes | Section for entering and/or uploading notes from quarterly updates with your manager | | Self-Assessment/ Development Plan | Questions that provide important information/feedback for your supervisor prior to their completion of the annual performance review | | Next Steps | Acknowledgement and overall rating section | | |

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| [**Quarterly Updates (1st, 2nd, and 3rd)**](https://www.youtube.com/watch?v=xiPTUdKSD5k&feature=youtu.be) | | |
| Quarterly check-ins with your supervisor are informal performance conversations that should cover three topics:   * review of expectations * progress on goals * opportunities for growth and development   Notes from a check-in may be entered or uploaded as an attachment into the appropriate box in the ***Quarterly Notes*** section. |  | |
| **4th Quarter Update / Preparing for the Annual Performance Review**  ***This step includes preparing for the annual performance review, as outlined below*** | | |
| **Responsibilities and Ratings Section** | | |
| **Accountabilities**  Enter your accountabilities into the box or use the ***Upload Document*** button to attach a copy of your Position Description  [Visit this link](https://hr.lehigh.edu/viewing-position-descriptions-pds) to access instructions for viewing/downloading your Position Description. |  | |
| **Goals**   * Enter your goals into the box or use the ***Upload Document*** button to attach a document.      * To attach more than one document, first click ***Save***, then click    and select ***Upload file*** * Optional: click ***Link journal entry*** to search for and link journal entries to the review |  | |
| **Lehigh’s Core Success Factors**  This box cannot be modified, but an attachment can be added. |  | |
| **Lehigh's Managerial Success Factors**  I *For managers only*  If **you do not manage** exempt or non-exempt staff, click  then ***OK*** to delete thisbox. |  | |
| **Self-Assessment Section** | | |
| This section contains seven self-assessment questions.   Your answers to these questions provide your supervisor with important information for completing your review. |  | |
| **Next Steps Section** | | |
| After completing all steps, navigate to the Next Steps section and select the ***Go to Next Step*** button.  *Clicking* ***“Go to next step”*** *will transition the form to your supervisor for the End of Year Evaluation (Rating) and you will not be able to make edits.* | |  |
| **Review Sign-Off** | | |
| ***This step occurs after your supervisor completes the End of Year Evaluation (Rating).***  ***Review all sections of the form for your manager’s comments and ratings.*** | | |
| The **Responsibilities and Ratings** section contains your ratings for Key Accountabilities, Goals, Lehigh’s Core Success Factors, and Lehigh’s Managerial Success Factors (if applicable) |  | |
| To add additional comments/responses (optional) click ***Add Comment*** button  Click ***Save & Share*** to publish the comment. Shared comments are visible to your manager. |  | |
| Navigate to the **Next Steps** section to view your overall rating and acknowledge your review.  *Selecting* ***“I acknowledge”*** *confirms the evaluation has been reviewed and discussed with you.* |  | |
| ***For additional references, visit*** [***https://hr.lehigh.edu/performance-review-process***](https://hr.lehigh.edu/performance-review-process)***.***  ***Contact*** [***inperf@lehigh.edu***](mailto:inperf@lehigh.edu) ***with questions or concerns.*** | | |