

Staff Performance Management Process User Guide



Click  or scan this QR code to access video tutorials:



The review process includes the following steps (listed in order)
When applicable, emails from the system will specify end dates

Step Name	Approx. Timeframe
Planning Step/End of First Quarter	March - April
2nd Quarter Update	July
3rd Quarter Update	October
4th Quarter & Prepare for End of Year Evaluation	Mid-December – Mid-January
End of Year Evaluation (Supervisor Rating)	Mid-January – Mid-February
Review Sign Off	Mid-late February

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

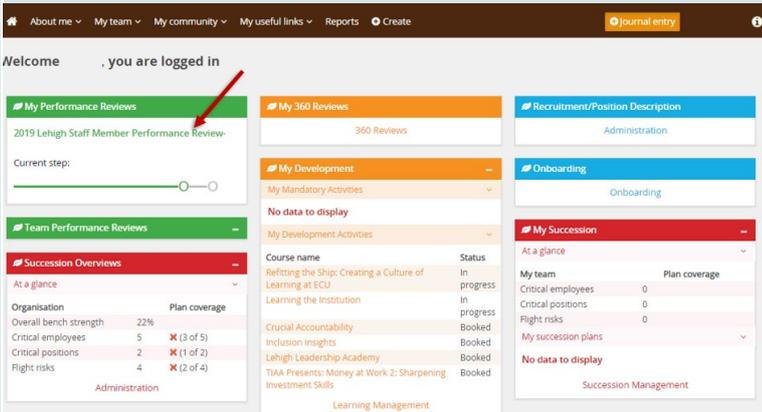
From the **"I want to"** drop down:

- > 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

Review process	Review step	Manager	Role	Start date	Due date	
2018 Lehigh Staff Member Performance Review	Review Complete		Lehigh Staff Member	30 Nov 2018	9 Mar 2019	I want to...
2019 Lehigh Staff Member Performance Review	End of Year Evaluation (Rating)	Manager Performance	Lehigh Staff Member	18 Mar 2019	31 Jan 2020	I want to...

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.

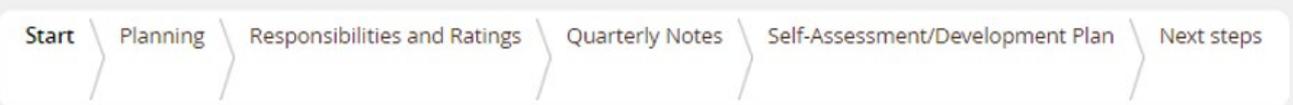


Navigation Bar (Section Types)

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
Planning	Optional freeform sheet
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

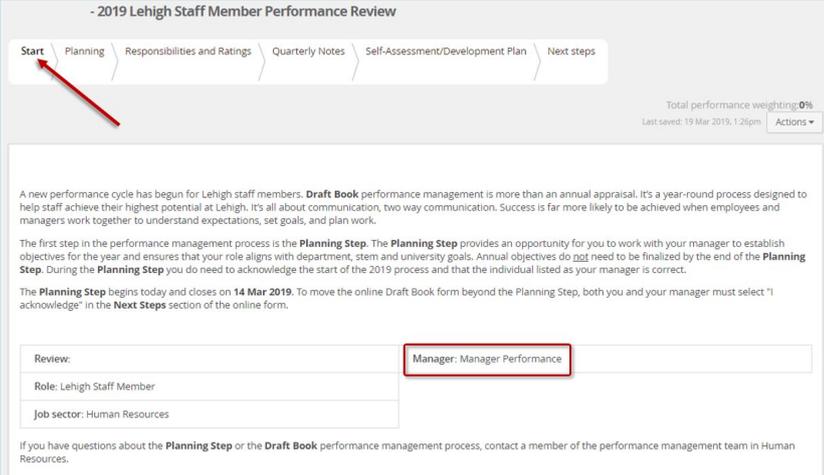
Performance Review Process Steps

Planning

During the 14 day **Planning Step**, verify that you have a current form, then complete the following:

Confirm your manager's name in the **Start** section

Email inperf@lehigh.edu if incorrect



- 2019 Lehigh Staff Member Performance Review

Start | Planning | Responsibilities and Ratings | Quarterly Notes | Self-Assessment/Development Plan | Next steps

Total performance weighting: 0%
Last saved: 19 Mar 2019, 1:25pm | Actions

A new performance cycle has begun for Lehigh staff members. **Draft Book** performance management is more than an annual appraisal. It's a year-round process designed to help staff achieve their highest potential at Lehigh. It's all about communication, two way communication. Success is far more likely to be achieved when employees and managers work together to understand expectations, set goals, and plan work.

The first step in the performance management process is the **Planning Step**. The **Planning Step** provides an opportunity for you to work with your manager to establish objectives for the year and ensures that your role aligns with department, stem and university goals. Annual objectives do **not** need to be finalized by the end of the **Planning Step**. During the **Planning Step** you do need to acknowledge the start of the 2019 process and that the individual listed as your manager is correct.

The **Planning Step** begins today and closes on **14 Mar 2019**. To move the online Draft Book form beyond the Planning Step, both you and your manager must select "I acknowledge" in the **Next Steps** section of the online form.

Review:

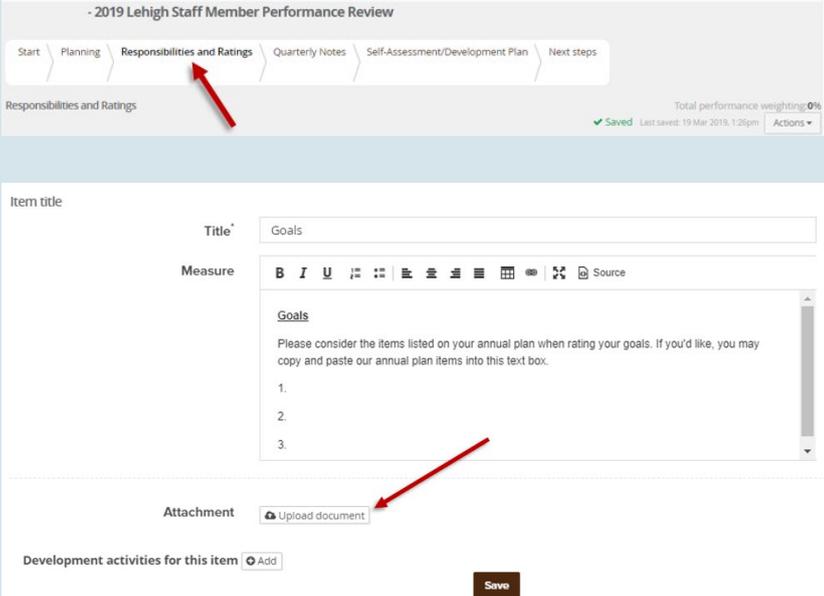
Role: Lehigh Staff Member

Job sector: Human Resources

If you have questions about the **Planning Step** or the **Draft Book** performance management process, contact a member of the performance management team in Human Resources.

Navigate to **Responsibilities and Ratings** section to enter your goals.

Enter your goals into the **Goals** box or use the **Upload document** button to attach a file (this can be updated later if needed).



- 2019 Lehigh Staff Member Performance Review

Start | Planning | Responsibilities and Ratings | Quarterly Notes | Self-Assessment/Development Plan | Next steps

Responsibilities and Ratings

Total performance weighting: 0%
Saved Last saved: 19 Mar 2019, 1:25pm | Actions

Item title

Title*

Measure **B I U** |  Source

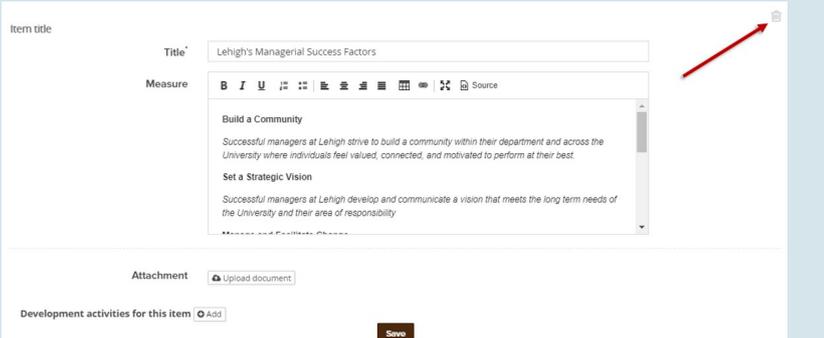
Goals

Please consider the items listed on your annual plan when rating your goals. If you'd like, you may copy and paste our annual plan items into this text box.

- 1.
- 2.
- 3.

Attachment

Development activities for this item

Item title

Title*

Measure **B I U** |  Source

Build a Community

Successful managers at Lehigh strive to build a community within their department and across the University where individuals feel valued, connected, and motivated to perform at their best.

Set a Strategic Vision

Successful managers at Lehigh develop and communicate a vision that meets the long term needs of the University and their area of responsibility

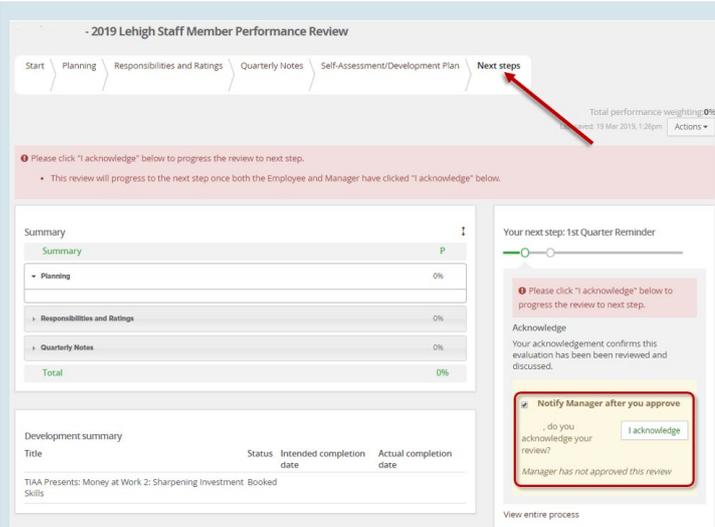
Attachment

Development activities for this item

Planning Step, Cont'd.

Navigate to the **Next Steps** section to acknowledge the beginning of the performance review process.

To complete the **Planning** step, both you and your supervisor must click **"I acknowledge"** in this section.

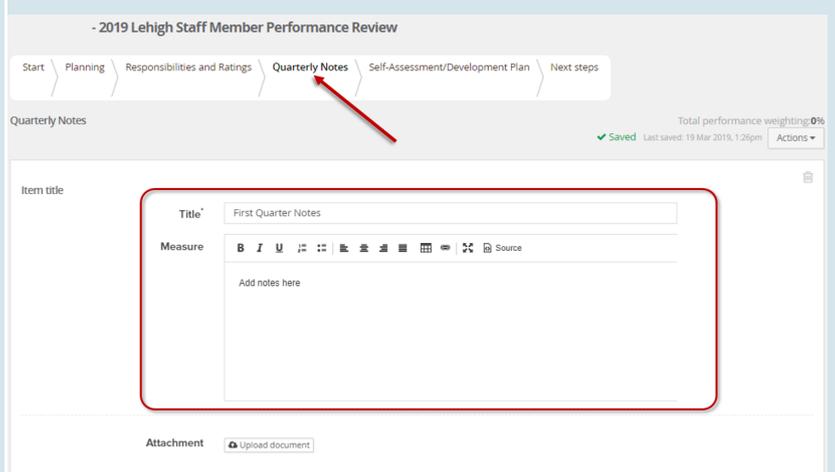


Quarterly Updates (1st, 2nd, and 3rd)

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

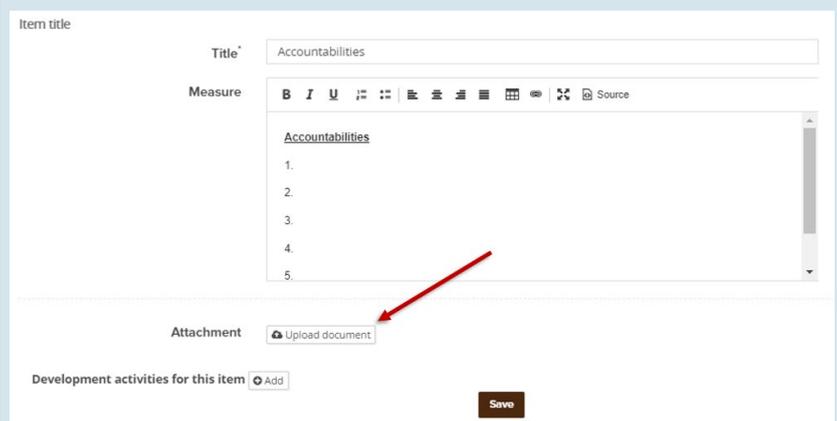
This step includes preparing for the annual performance review, as outlined below

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](#) to access instructions for viewing/downloading your Position Description.

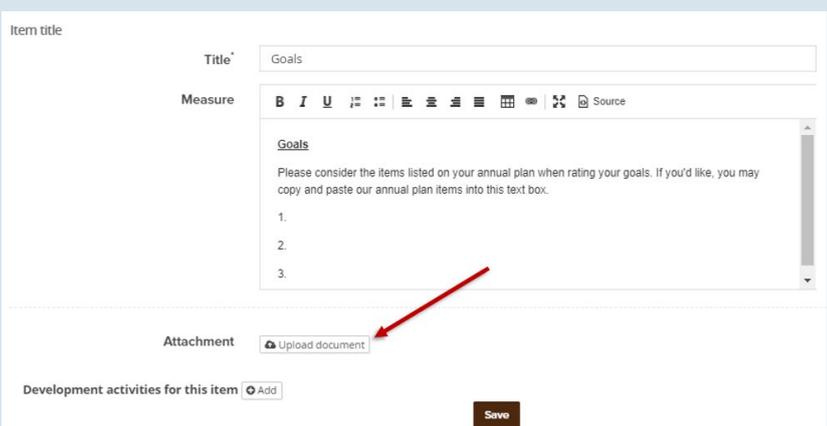


Goals

- > 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



Item title

Title* Goals

Measure

B I U [Rich Text Editor Icons]

Goals

Please consider the items listed on your annual plan when rating your goals. If you'd like, you may copy and paste our annual plan items into this text box.

- 1.
- 2.
- 3.

Attachment

Development activities for this item



5.

6.

External feedback

Development activities for this item

Add comment

Link journal entry

Upload file

There are no comments for this goal.



External feedback

Development activities for this item

Add comment

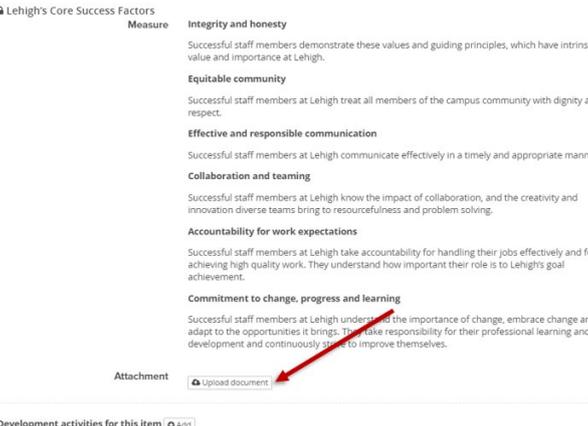
Link journal entry

Upload file

There are no comments for this goal.

Lehigh's Core Success Factors

This box cannot be modified, but an attachment can be added.



Lehigh's Core Success Factors

Measure

Integrity and honesty

Successful staff members demonstrate these values and guiding principles, which have intrinsic value and importance at Lehigh.

Equitable community

Successful staff members at Lehigh treat all members of the campus community with dignity and respect.

Effective and responsible communication

Successful staff members at Lehigh communicate effectively in a timely and appropriate manner.

Collaboration and teaming

Successful staff members at Lehigh know the impact of collaboration, and the creativity and innovation diverse teams bring to resourcefulness and problem solving.

Accountability for work expectations

Successful staff members at Lehigh take accountability for handling their jobs effectively and for achieving high quality work. They understand how important their role is to Lehigh's goal achievement.

Commitment to change, progress and learning

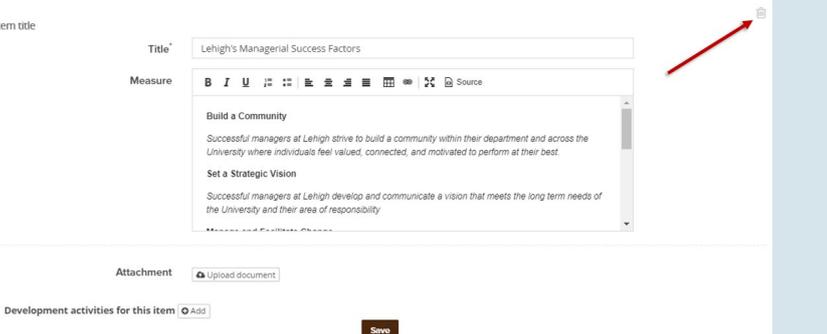
Successful staff members at Lehigh understand the importance of change, embrace change and adapt to the opportunities it brings. They take responsibility for their professional learning and development and continuously strive to improve themselves.

Attachment

Development activities for this item

Lehigh's Managerial Success Factors

For managers only

Item title

Title* Lehigh's Managerial Success Factors

Measure

B I U [Rich Text Editor Icons]

Build a Community

Successful managers at Lehigh strive to build a community within their department and across the University where individuals feel valued, connected, and motivated to perform at their best.

Set a Strategic Vision

Successful managers at Lehigh develop and communicate a vision that meets the long term needs of the University and their area of responsibility

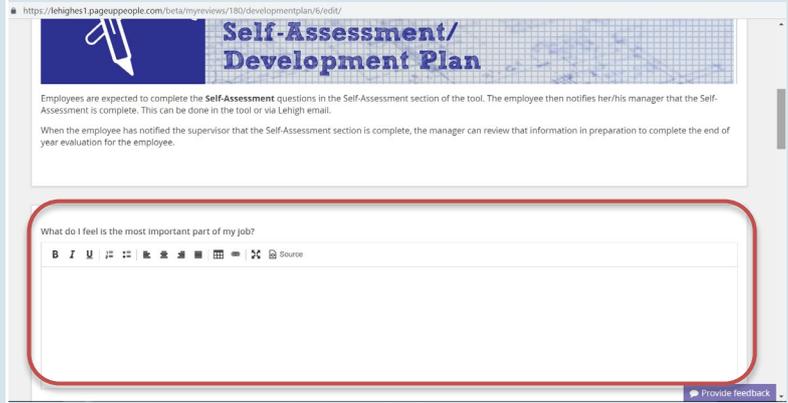
Attachment

Development activities for this item

Self-Assessment Section

This section contains seven self-assessment questions.

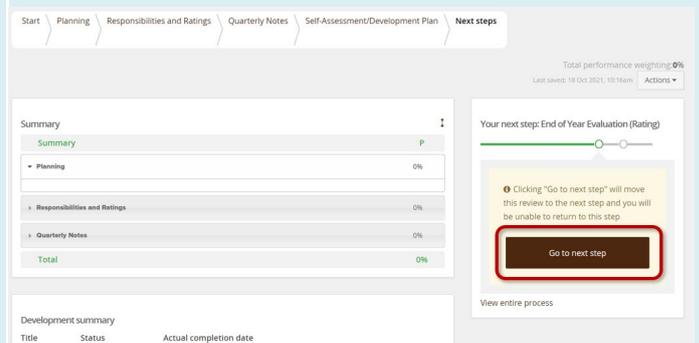
Your answers to these questions provide your supervisor with important information for completing your review.



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.



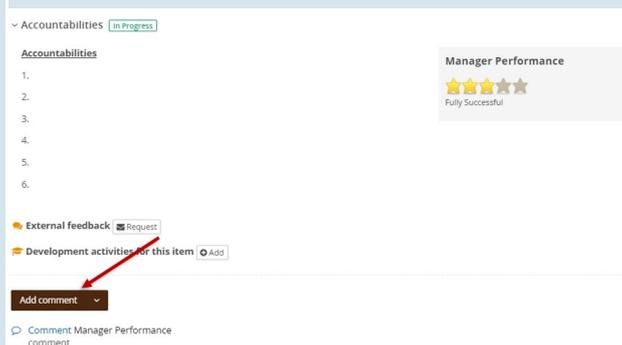
Review Sign-Off

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.

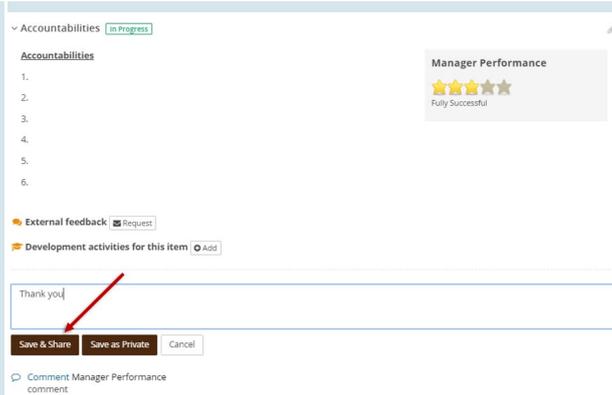
The **Responsibilities and Ratings** section contains your ratings for Key Accountabilities, Goals, Lehigh’s Core Success Factors, and Lehigh’s Managerial Success Factors (if applicable)



To add additional comments/responses (optional) click **Add Comment** button



Click **Save & Share** to publish the comment. Shared comments are visible to your manager.



Accountabilities In Progress

Accountabilities

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

External feedback Request

Development activities for this item Add

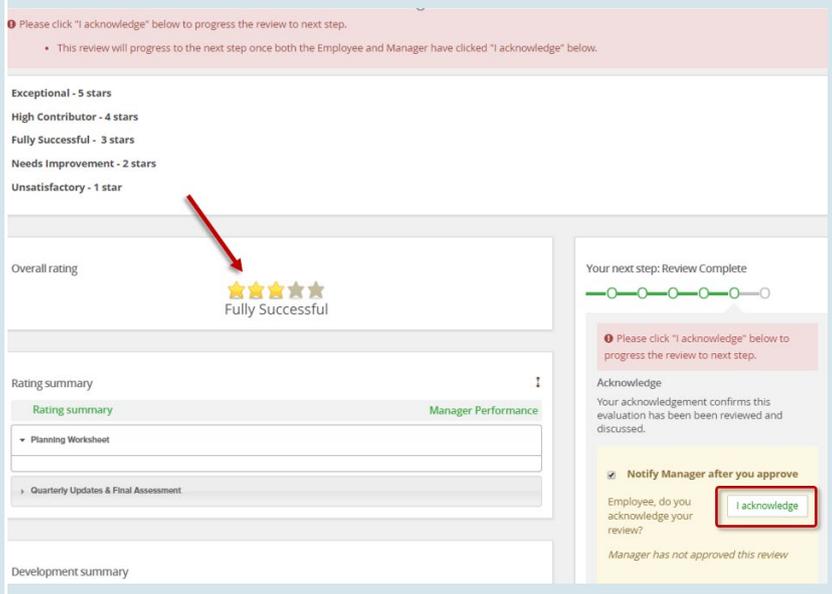
Thank you

Save & Share Save as Private Cancel

Comment: Manager Performance comment

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.



Please click "I acknowledge" below to progress the review to next step.

- This review will progress to the next step once both the Employee and Manager have clicked "I acknowledge" below.

Exceptional - 5 stars
High Contributor - 4 stars
Fully Successful - 3 stars
Needs Improvement - 2 stars
Unsatisfactory - 1 star

Overall rating

Fully Successful

Rating summary

Rating summary Manager Performance

- Planning Worksheet
- Quarterly Updates & Final Assessment

Development summary

Your next step: Review Complete

Please click "I acknowledge" below to progress the review to next step.

Acknowledge

Your acknowledgement confirms this evaluation has been reviewed and discussed.

Notify Manager after you approve

Employee, do you acknowledge your review?

I acknowledge

Manager has not approved this review

For additional references, visit <https://hr.lehigh.edu/performance-review-process>.

Contact inperf@lehigh.edu with questions or concerns.