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

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

System Access & Navigation

Login
Visit [https://lehighes1.pageuppeople.com](https://lehighes1.pageuppeople.com) to access the PageUp system.

Log in using your Lehigh SSO user name and password.

Disable your internet browser pop-up blocker if needed.

Accessing Your Team’s Current and Completed Forms

Under the **My Team** 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

Click on or scan this QR code to access video tutorials:
Accessing Current and Completed Forms, Cont’d

Or, access your direct report’s current performance review from the Home Page by clicking the link in the green Team 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

<table>
<thead>
<tr>
<th>Start</th>
<th>Introductory/informational page to review at the beginning of each step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>Optional freeform sheet</td>
</tr>
<tr>
<td>Responsibilities &amp; Ratings</td>
<td>Section for storing and rating key accountabilities, goals, Lehigh’s Core Success Factors, and Lehigh’s Managerial Success Factors (when applicable)</td>
</tr>
<tr>
<td>Quarterly Notes</td>
<td>Section for entering and/or uploading notes from quarterly updates</td>
</tr>
<tr>
<td>Self-Assessment/Development Plan</td>
<td>Contains Self-Assessment questions the employee answers to provide information and feedback for the manager; also lists upcoming and completed learning activities</td>
</tr>
<tr>
<td>Next Steps</td>
<td>Acknowledgement and overall rating section</td>
</tr>
</tbody>
</table>
**Supervisor Performance Management Process User Guide**

**Performance Review Process Steps**

**Planning**

During the 14 day Planning Step, your direct report is to complete the following:

- Verify they have this year’s form
- Confirm the manager’s name in the Start section; email inperf@lehigh.edu if incorrect
- Navigate to the Responsibilities and Ratings section to:
  - Enter this year’s goals (this can be updated later if needed)
  - Delete the Managerial Success Factors box if they do not manage exempt or non-exempt staff
- Click **I acknowledge** in the Next Steps section to acknowledge the beginning of the review process

When these tasks are complete, navigate to the Next Steps section in your direct report’s review to acknowledge the beginning of the review process.

- To complete the Planning step, both you and your direct report must click **I acknowledge** in this section.

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

Quarterly check-ins with your direct report are informal performance conversations that should cover three topics:

- review of expectations
- progress on goals
- opportunities for growth and development

The employee may enter check-in notes manually or upload them as an attachment into the appropriate box in the Quarterly Notes section of their form.

*Supervisor comments are required in this section.*
During the 4th Quarter step, your direct report is to complete the following in preparation for the annual performance review:

- Enter Accountabilities manually or upload a copy of the Position Description
- Enter or revise Goals
- Answer the Self-Assessment questions

No supervisor action is required during this step.

External Feedback Feature

This function is used to request performance feedback from individuals who are not the employee’s direct supervisor.

It can be useful in the event of a dual reporting structure, or may be used to solicit feedback from colleagues or others as appropriate.

Entries submitted via External feedback will embed directly into the Performance Review.

At the close of the Fourth Quarter Update step, the Performance Review form will automatically transition to you for the End of Year Evaluation (Rating) and the direct report will not be able to make edits.
**Supervisor Performance Management Process User Guide**

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### End of Year Evaluation (Rating)

Begin by reviewing the content within these sections:

- **Planning** (use of this section is optional)
- **Quarterly Notes**
- **Self-Assessment/Development Plan**
  - Click the **Completed** tab to view learning activity completions

Navigate to the **Responsibilities and Ratings** section to review Accountabilities and Goals and assign ratings

Assign **star ratings** for:

- **Accountabilities**
- **Goals**
- **Lehigh’s Core Success Factors**
- **Lehigh’s Managerial Success Factors** *(if the employee manages exempt or non-exempt staff)*

<table>
<thead>
<tr>
<th>Star Rating Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Star 5</td>
<td>Results are above and beyond expectations in a manner than is significant, extraordinary and rare</td>
</tr>
<tr>
<td>Star 4</td>
<td>Results are consistent with complete mastery of all job expectations, including goals and behaviors (success factors)</td>
</tr>
<tr>
<td>Star 3</td>
<td>Results meet all expectations (key accountabilities, goals and behaviors); a reliable and competent employee</td>
</tr>
<tr>
<td>Star 2</td>
<td>Results demonstrate potential to become successful; some development and/or improvement is needed</td>
</tr>
<tr>
<td>Star 1</td>
<td>Results significantly miss achievement of expectations; immediate improvement is required</td>
</tr>
</tbody>
</table>

---
Click **Add comment** to elaborate on your rating and provide additional feedback to the employee.

Supervisor comments are **required** for all **star-rated items** and items in the **Quarterly Updates** section.

**Comments do not save automatically.**

Click **Save & Share** to post your comment to the review. Shared comments are visible to the employee.

Use the **Save as Private** option to add notes for yourself or to save a draft comment.

To link a journal entry or upload additional attachments to the review, use the dropdown button next to the **Add comment** button.

To enroll the employee in development activities from the **Learning Library**, click the **Add** button and select an activity.

After assigning star ratings for **Accountabilities**, **Goals**, **Lehigh’s Core Success Factors**, and **Lehigh’s Managerial Success Factors** (if applicable), and adding/saving your comments, navigate to the **Next Steps** section to assign the overall rating.
The form does not automatically calculate an overall rating. A one star/unsatisfactory rating displays until an overall rating is assigned.

- Assign the overall rating using the sliding scale
- Click Save
- Refresh the page (Ctrl+R) to ensure the Overall rating box matches the calibrated rating.

Note: The overall rating should align with stars assigned in the Responsibilities and Ratings section of the form. If you’ve assigned any one star (Unsatisfactory) or two star (Needs Improvement) ratings, please contact the performance management team in HR at inperf@lehigh.edu

When the evaluation is complete, click **Go to next step** to send the form to the employee for review and acknowledgement.

Do NOT click **Go to next step** until the evaluation is completely finished. Clicking, ‘Go to next step’ will move this review to the next step and you will be unable to return to this step.

**Review Sign-Off**

Review all sections of the form for any additional employee comments before finalizing the review.

To add additional comments/responses (optional):

- Click **Add comment**
- Click **Save & Share** to publish the comment
Navigate to the Next Steps section and click I acknowledge to finalize the review.

Selecting I acknowledge confirms the evaluation has been reviewed and discussed with the employee.

For additional references, visit https://hr.lehigh.edu/performance-review-process. Contact inperf@lehigh.edu with questions or concerns.