Supervisor Performance Management Process User Guide

LEHIGH UNIVERSITY

TALENT MANAGEMENT

| 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

Click ▶ *or scan this QR code to access* **video tutorials**:

System Access & Navigation

Login

Visit 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.
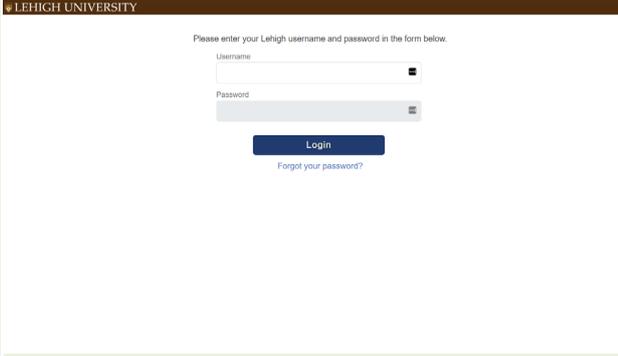
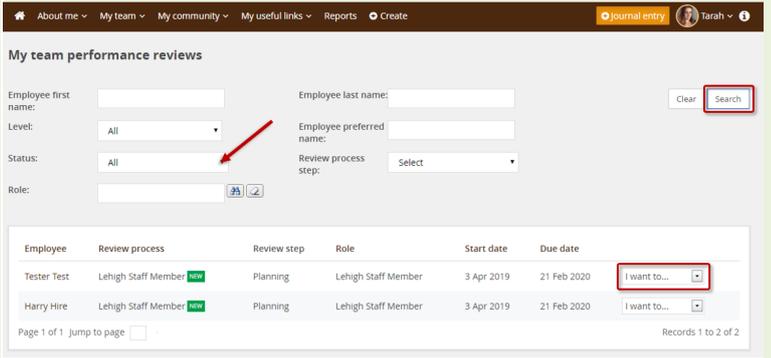### Accessing Your Team's Current and Completed Forms

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

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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.
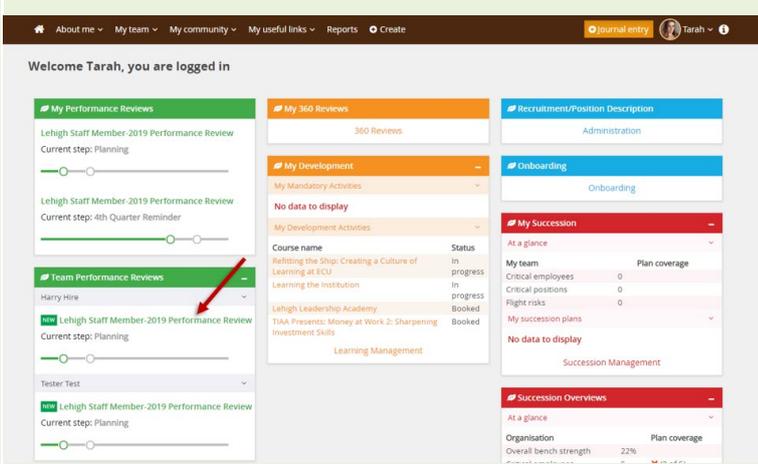
Navigation Bar (Section Types)

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

Start	Introductory/informational page to review at the beginning of each step
Planning	Optional freeform sheet
Responsibilities & Ratings	Section for storing and rating key accountabilities, 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
Self-Assessment/ Development Plan	Contains Self-Assessment questions the employee answers to provide information and feedback for the manager; also lists upcoming and completed learning activities
Next Steps	Acknowledgement and overall rating section

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| **Performance Review Process Steps** |
| :---: |

Planning ▶

During the 14 day Planning Step, your <u>direct report</u> 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
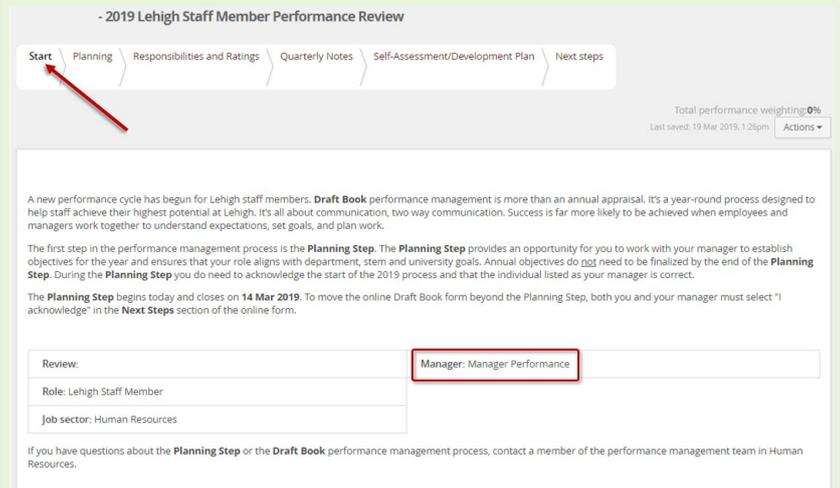
When these tasks are complete, navigate to the **Next Steps** section in your direct report's review to acknowledge the beginning of the review process.

> To complete the **Planning** step, *both you and your direct report* must click **I acknowledge** in this section.
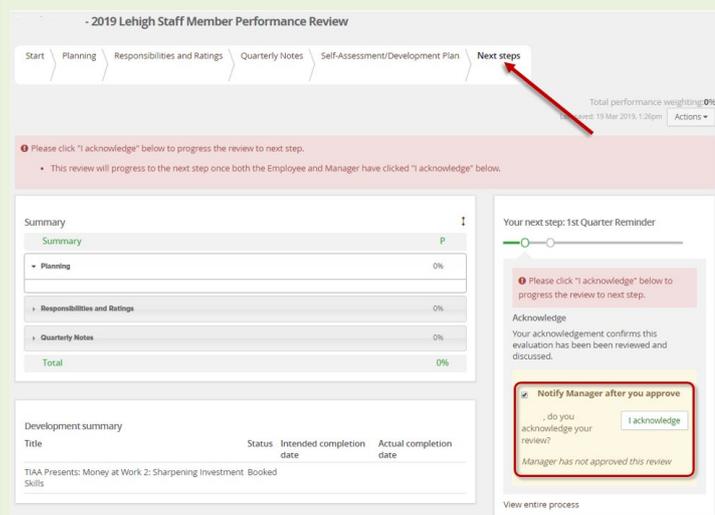
Quarterly Updates (1st, 2nd, and 3rd) ▶

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.

The PageUp system requires supervisor comments in this section, though this is not a required part of Lehigh's process.

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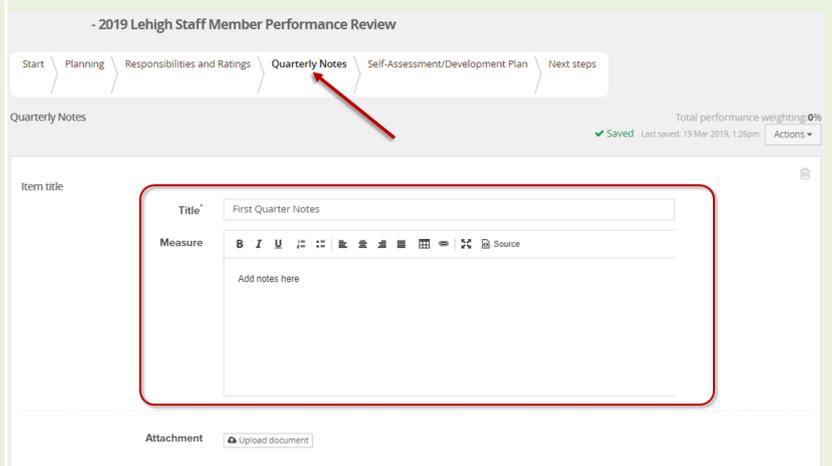
4th Quarter Update ▶

This step includes preparing for the annual performance review

During the 4th Quarter step, your <u>direct report</u> 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
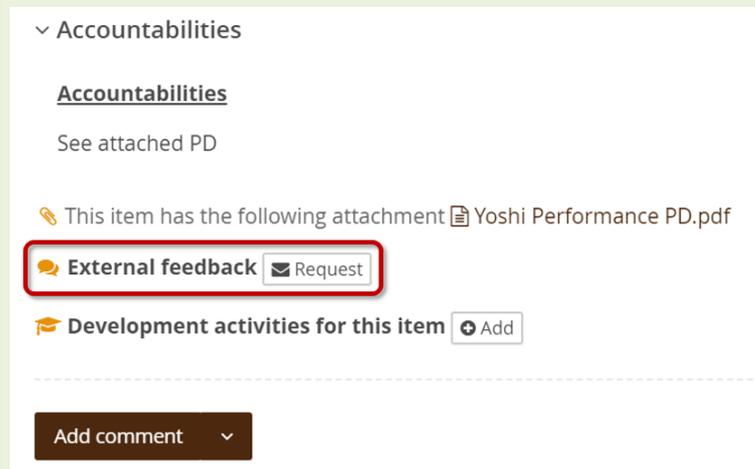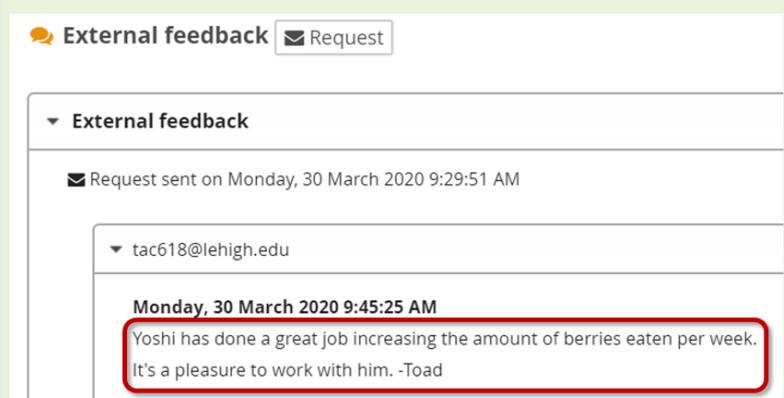
No supervisor action is required during this step.
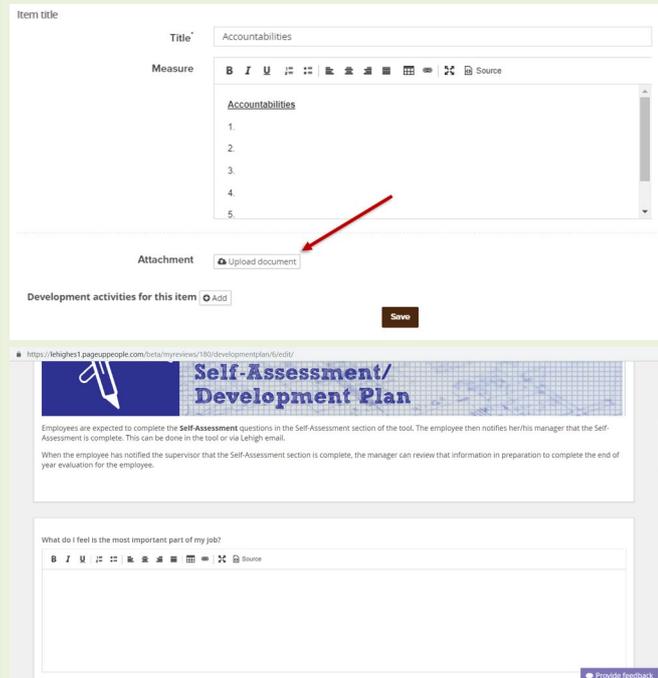
External Feedback Feature

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.

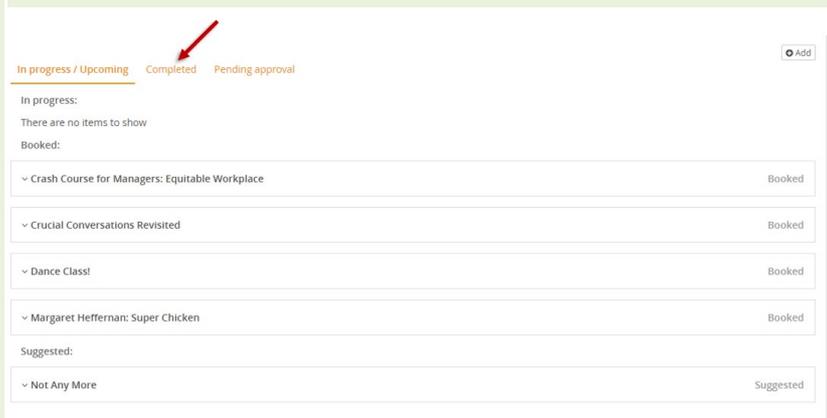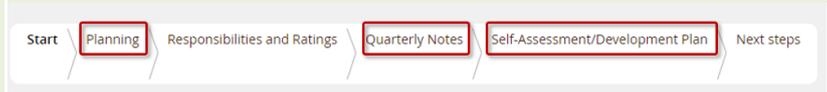Entries submitted via **External feedback** will embed directly into the Performance Review.

ﹽ **Accountabilities**

Accountabilities

See attached PD

🔗 This item has the following attachment 📄 Yoshi Performance PD.pdf

💬 External feedback ✉ Request

🎓 Development activities for this item ⊕ Add

[Add comment ⌄]

💬 **External feedback** ✉ Request

▾ External feedback

✉ Request sent on Monday, 30 March 2020 9:29:51 AM

▾ tac618@lehigh.edu

Monday, 30 March 2020 9:45:25 AM

Yoshi has done a great job increasing the amount of berries eaten per week. It's a pleasure to work with him. -Toad

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In order to transition the form to you for the End of Year Evaluation (Rating) step, your direct report must select the "Go to next step" button in the Next Steps section of their form. After doing so, they will not be able to make edits.

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	Start〉Planning〉Responsibilities and Ratings〉Quarterly Notes〉Self-Assessment/Development Plan〉Next steps In progress / Upcoming　Completed　Pending approval　　　⊕ Add In progress: There are no items to show Booked: ⌄ Crash Course for Managers: Equitable Workplace　　Booked ⌄ Crucial Conversations Revisited　　　　　　　　　　Booked ⌄ Dance Class!　　　　　　　　　　　　　　　　　　Booked ⌄ Margaret Heffernan: Super Chicken　　　　　　　　Booked Suggested: ⌄ Not Any More　　　　　　　　　　　　　　　　Suggested
Navigate to the **Responsibilities and Ratings** section to review Accountabilities and Goals and assign ratings	Start〉Planning〉Responsibilities and Ratings〉Quarterly Notes〉Self-Assessment/Development Plan〉Next steps
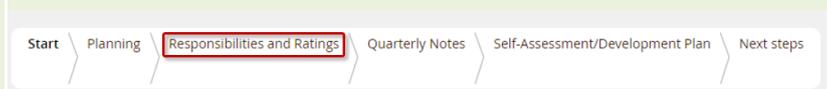
Assign **star ratings** for: > Accountabilities > Goals > Lehigh's Core Success Factors > Lehigh's Managerial Success Factors 　*(if the employee manages exempt or non-exempt staff)*	**Star Rating Criteria**
	★★★★★ **Exceptional** — Results are above and beyond expectations in a manner than is significant, extraordinary and rare
	★★★★☆ **High Contributor** — Results are consistent with complete mastery of all job expectations, including goals and behaviors (success factors)
	★★★☆☆ **Fully Successful** — Results meet all expectations (key accountabilities, goals and behaviors); a reliable and competent employee
	★★☆☆☆ **Needs Improvement** — Results demonstrate potential to become successful; some development and/or improvement is needed
	★☆☆☆☆ **Unsatisfactory** — Results significantly miss achievement of expectations; immediate improvement is required

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

Supervisor comments are **required** for all **star-rated items**.

*Note: The PageUp system also requires supervisor comments in the **Quarterly Updates** section, though this is not a required part of Lehigh's process.*
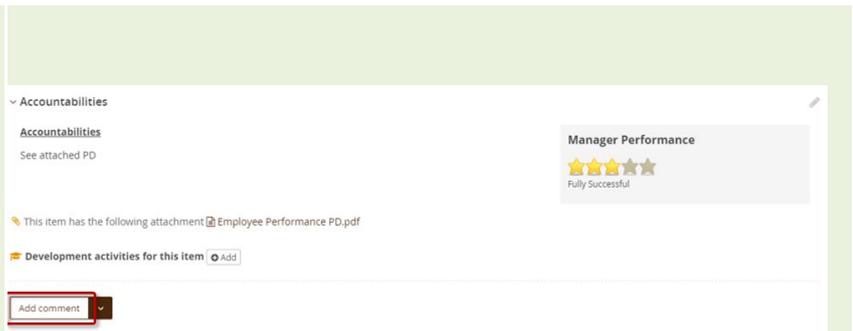

Comments do not save automatically.

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. These can be published or deleted later. To publish a draft comment, edit the comment then click **Save & Share.**
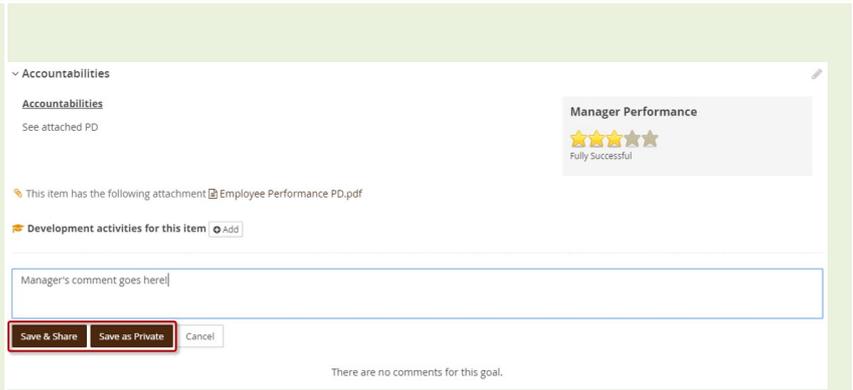
To link a journal entry or upload additional attachments to the review, use the dropdown button next to the **Add comment** button

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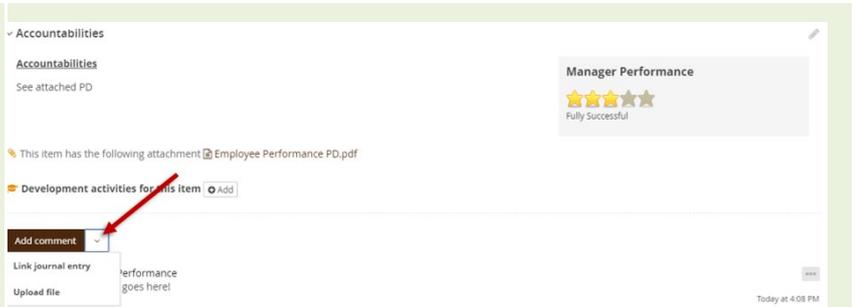
To enroll the employee in development activities from the **Learning Library**, click the **Add** button and select an activity.
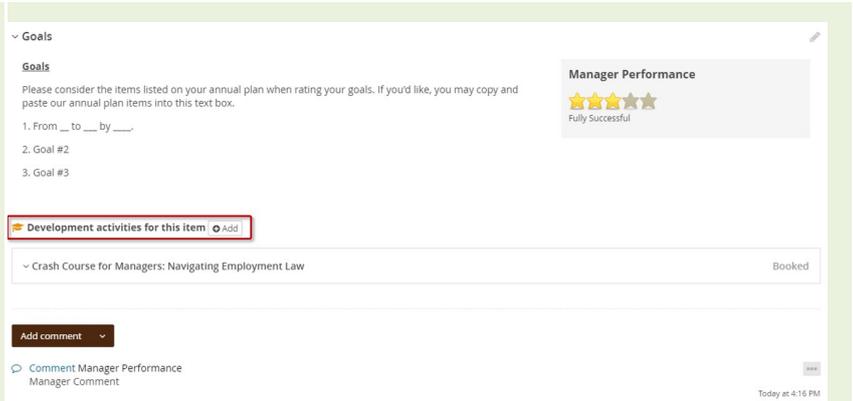
After assigning star ratings for Accountabilities, Goals, Lehigh's Core Success Factors, and Lehigh's Managerial Success Factors (if applicable), and entering and saving your comments in all sections, navigate to the **Next Steps** section to assign the overall rating.
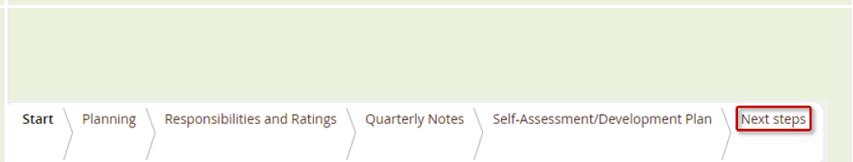
The form does not automatically calculate an overall rating. A one star/unsatisfactory rating displays until an overall rating is assigned.

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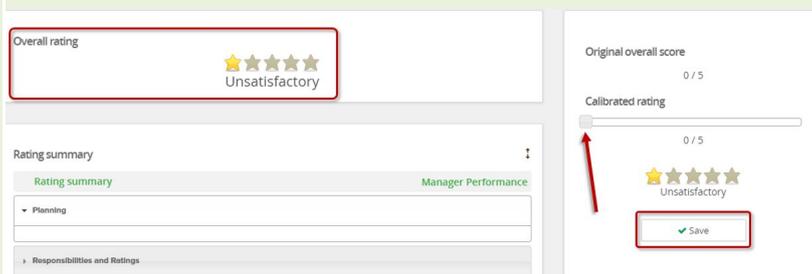
When the evaluation is complete, click **Go to next step** to send the form to the employee for review and acknowledgement.

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."*
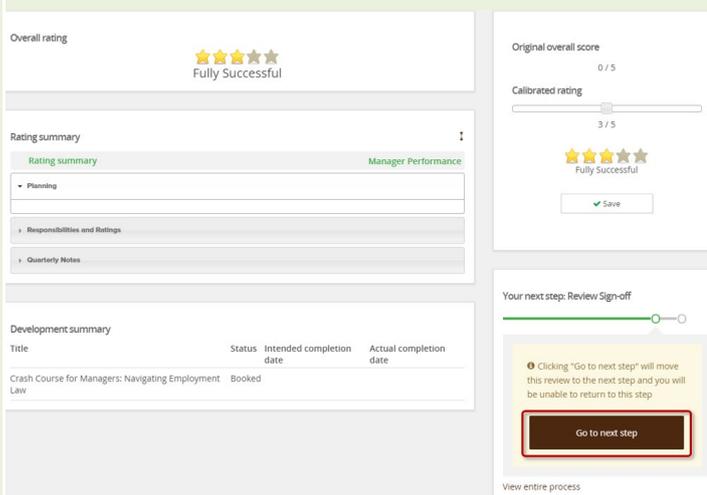
Note: If you click *"Go to Next Step"* and receive an error or are unable to progress the form:

- Review all information in the pink box at the top of the page. This is where the system defines what steps must be taken to move the form forward.
- The PageUp system requires comments in every comment field of the form, including the **Quarterly Notes** section.
- Lehigh's performance management process requires comments in the **Responsibilities and Ratings** section and **Overall** comments.
- You will need to enter "No comment" or "N/C" in the **Quarterly Notes** sections.

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Review Sign-Off

Review **all sections** of the form for any additional employee comments before finalizing the review.
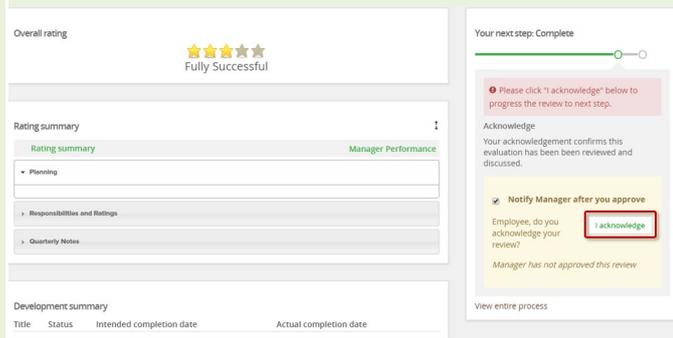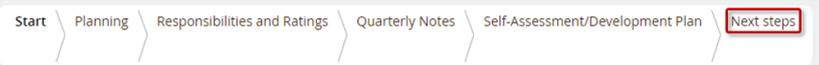
To add additional comments/responses (optional):

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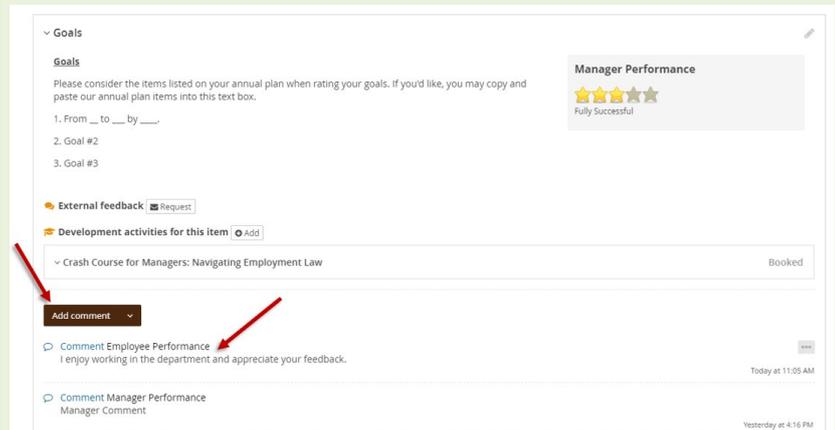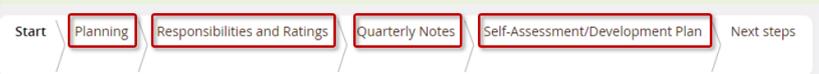
Navigate to the **Next Steps** section and click **I acknowledge** to finalize the review.

*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.