



## Process, Access, Sections

1. Performance Plan
2. Plan Approval
3. Touchpoints
4. Employee Self-Evaluation
5. Supervisor Evaluation of Employee
6. Reviewer
7. Supervisor/Employee Discussion
8. Employee Acknowledgement



1. Access by logging into PageUp Talent Management System using this URL:  
<https://virginiatech.pageuppeople.com/dock.aspx> or by navigating to [training.vt.edu](https://training.vt.edu) and selecting PageUp LMS.
2. Access the performance review through either the widget as shown in Figure 1 or through the Navigation Bar:  
About me > Performance Reviews

FIGURE 1. DASHBOARD WIDGET

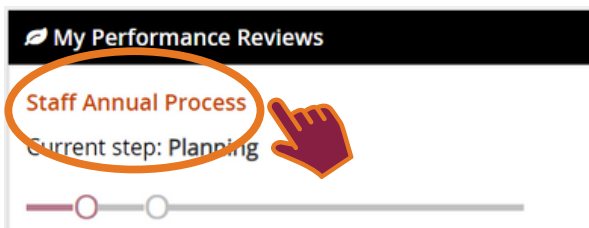
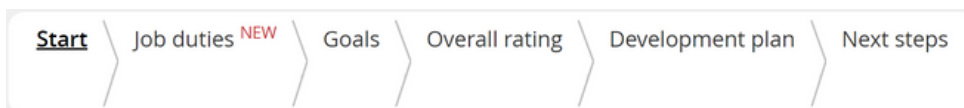


FIGURE 2. STAFF ANNUAL PERFORMANCE SECTIONS



The section headers are **Start**, **Job duties**, **Goals**, **Overall rating**, **Development plan**, and **Next steps**.

**Start** is your first page with each part in the process. It provides a description of what to expect. **Job duties** are pulled from the Applicant Tracking System (ATS). These will be rated. **Goals** are added by the employee and supervisor. **Overall rating** is available only during the Evaluation step in the process. **Development plan** pulls from the Learning Management System (LMS). **Next steps** includes the acknowledgement and the final overview during that step in the process.



**Start** / Job duties <sup>NEW</sup> / Goals / Overall rating / Development plan / Next steps

## Plan / Touchpoints / Evaluation

For more information on goal setting, watch the video below. Additional resources are provided below.

Here is more information on developing your performance plan:

- You will see your Job Duties, which are pulled from your position description. As you review them ask yourself, are they up to date? Has your job changed? How you are currently spending your time? How should you be spending your time in order to achieve business priorities? Be prepared to discuss this with your supervisor.
- In the Goals section, this is where you should record goals that are specific to you for this performance cycle. Goals can tie to job duties or they may be developmental or stretch assignments to facilitate career development. Identify any key competencies essential to your position.
- In the Development Plan section, consider what development needs will help you in your role or future roles.

After you have discussed and agreed on the performance plan with your supervisor, select **Next Steps** at the top of the page. Either one of you can select "go to next step," to progress to the plan approval step.



**Watch a video: It's Goal Setting Time - Start Here**

**Resources:**

- Writing a job description
- Performance Management Resources
- Performance Management website

Next ➔

Job duties are pulled from the position description in the PageUp Applicant Tracking System (ATS). These are the basic requirements to perform the function successfully. Review the job duties during the performance planning phase to ensure they accurately reflect the responsibilities of the position.

While the job duties below can be edited, the official position description must be updated in the ATS system, as this is the source of record for the university. Supervisors should review job duties annually and make sure the ATS position description is up to date. If updates are needed, contact your college or department HR representative.

If there are additional goals, competencies, or other expectations for this performance cycle, those can be added in the next section, "Goals."

**IMPORTANT: Do not delete job duties below. Once deleted, job duties cannot be added back or restored in the performance management system. Instead, edit the content below or use comments to note differences, changes, or additional responsibilities that may be added. Edits made in this system will not automatically update in the ATS.**

Item title

Title\*

Please enter Job duties title here ...

Measure

**B** *I* U | Source

## REQUIRED

**i** You missed 1 field. It has been highlighted below.  
This field is required.

[← Back](#)

Next →



## Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

## Plan

[Plan](#) / [Touchpoints](#) / [Evaluation](#)

A supervisor and employee should discuss the goals for the coming year. These can be a mixture of short- and long-term, innovative, and routine goals, but should all have a clear link to organizational priorities. Goals can tie to job duties or they may be developmental or stretch assignments to facilitate career development. One goal is required. One document can be uploaded in support of each goal.

- An example of a goal that ties to a job duty might be specific project details that align with project coordination responsibilities in the position description.
- An example of a new goal might be a learning or growth assignment to receive a certification that is not required by the specific position description.
- A goal could also be a competency. Competencies are a set of related knowledge, skills, abilities, and behaviors, or other characteristics that are needed to perform work assignments in a defined work setting.

When setting goals, you should ensure the goals are SMART:

- **Specific:** You are clear on what is meant by the goal. Ask: What do you want to achieve and why? What are the requirements/constraints? Who is involved?
- **Measurable:** You know when it has been achieved and how achievement will be measured. Ask: How do you track progress and measure the outcome? How will you know when you have reached it?
- **Achievable:** The goal is within your capability with available resources. Ask: How will you accomplish the goal? Is it realistic?
- **Relevant:** The goal is reasonable, reflects departmental goals, and is results-based. Ask: Is this a worthwhile goal? What is the expected impact? Does it align with our organizational goals?
- **Timebound:** You know the deadline for the goal. Ask: When will you accomplish this goal?



Item title

Title\*

Please enter Goals title here ...

Measure

**B** *I* U | | | | | 
**REQUIRED**

**i** You missed 1 field. It has been highlighted below.  
This field is required.

Attachment

Upload document

[+ Add Goals](#)
[← Back](#)
[Next →](#)



## Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

## Plan

[Plan](#) / [Touchpoints](#) / [Evaluation](#)

This section will be accessible during the evaluation steps. Please move to the next step.

Please provide an overall rating

Actions

[View progress report](#)[← Back](#)[Next →](#)

Career development is an important aspect of a performance plan and the performance process provides a great opportunity to discuss the employee's professional growth opportunities, aspirations, and current successes.

When creating or updating a career development plan, make sure there are clear action steps including:

- **Objective:** What should be improved and how will it be measured?
- **Outcomes:** What do you hope to achieve with this learning experience?
- **Timeline:** What is the expected time frame?
- **Resources:** What resources may be required?

LMS activities can be linked to performance and development goals by using the "add development activity" button. An example where this feature is helpful is assigning the "Fast Track for New Supervisors" program if one of the employee's goals is to become a supervisor or leader in the next two years.

Not all activities are included in the LMS, so an employee can [create an individual learning activity](#). For example, an employee may attend a conference or serve on the university's Staff Senate. These activities can then be added to their career development plan as part of the performance process.

During Touchpoint conversations, employees and supervisors should review and discuss the completion or progress of each learning activity. During the annual review, talk about what was accomplished during the year and plans for the next year to ensure the employee is taking advantage of professional development opportunities. Additional resources are provided below to help with career development plans.

**Resources:**

- [Development Action Plan](#)
- [Professional development guide for employees](#)
- [Professional development coaching guide for supervisors](#)

[Add](#)[In progress / Upcoming](#)[Completed](#)[Pending approval](#)[← Back](#)[Next →](#)

Once you have discussed and agreed on the performance plan with your supervisor, [supervisor], either one of you can select "go to next step" to progress to the plan approval step.

## Summary

## Summary

▼ 1st Yr/Probationary

1.

▶ Job duties

▶ Goals

▶ Overall rating

## Development summary

Title	Status	Intended completion date	Actual completion date
-------	--------	--------------------------	------------------------

## Your next step: Plan Approval

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

[Go to next step](#)[View entire process](#)OVERALL  
RATING

DEVELOPMENT PLAN

NEXT STEPS



Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

# Plan APPROVAL

[Plan](#) / [Touchpoints](#) / [Evaluation](#)

Welcome, [employee], to the plan approval stage of your performance cycle.

Now that you and your supervisor have created the plan, please review each section and go to the Next Steps section to acknowledge. Both you and your supervisor must acknowledge to move to the next stage.

If edits need to be made, your supervisor will need to move the plan back to the planning step.

**Resources:**

- [Performance Management Resources](#)
- [Performance Management website](#)

[Next](#)[1st Yr/Probationary](#) [Job duties](#) **NEW** [Goals](#) [Overall rating](#) [Development plan](#)

All these sections' content is locked and cannot be edited.

[Back](#)[Next](#)

Once you have discussed and agreed on the performance plan with your supervisor, [supervisor], you must select "I acknowledge" below. Both you and your supervisor must acknowledge before you will move to the Touchpoints section of the performance cycle.

**Cannot progress the review to the next step**

- Both the employee and supervisor must approve and acknowledge the review before either one can move to the next step.

**Summary****Summary****1st Yr/Probationary**

1.

**Job duties****Goals****Overall rating****Development summary**

Title	Status	Intended completion date	Actual completion date
-------	--------	--------------------------	------------------------

Your next step: Touchpoints

**Cannot progress the review to the next step****Approval**

Both the employee and supervisor must acknowledge the plan to move into Touchpoints in the performance cycle.

☒ **Notify Sue after you approve**

Sarah, do you approve your review? [I acknowledge](#)

Sue has not approved this review

[View entire process](#)





Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

# Touchpoints

Plan / [Touchpoints](#) / Evaluation**Welcome to Touchpoints with [supervisor].**

Touchpoints allow you the opportunity to record and document discussions with your supervisor frequently throughout the year to include in your performance evaluation. You may add comments, [create a journal entry](#), or add documentation to track progress and discussions.

Watch a video below on starting something new! Additional resources are provided below.

Having frequent collaborative meetings with your supervisor is essential for your success. It is important for you to participate fully in these open conversations about your goals, development plan, and performance to keep them current and help the evaluation process to run smoothly without any surprises or upsets.

Stay engaged in your success!

[Next](#)
[Job duties](#) **NEW** [Goals](#) [Overall rating](#)

All of these sections can have comments added, journal entries linked, and documents uploaded.

[Back](#)[Next](#)[Development plan](#)

Your comments

Comments can be added in a rolling text box. Progress is pulled from the LMS. Courses can be added at any time.

[Back](#)[Next](#)**Next Steps** will show the summary.

The system will automatically progress to the review stage once the last date for Touchpoints has passed. Then the review will move to the self-evaluation. Once the employee completes their evaluation, and the supervisor and reviewer have completed their parts, then the supervisor and employee have a discussion.

Finally, the review will move to the employee acknowledgement.

# Evaluation

Plan / Touchpoints / [Evaluation](#)



## Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

## Evaluation

## SELF-EVALUATION

[Plan](#) / [Touchpoints](#) / [Evaluation](#)**Welcome, [employee] to your self-evaluation.**

The self-evaluation is your opportunity to take an active role in the evaluation process. Rather than being the recipient of feedback from your supervisor, it gives you the opportunity to have a two-way conversation with them about your performance throughout the year.

For more information on evaluating performance, watch the video below. Additional resources are also provided.

Following are reasons for a self-evaluation:

- Helps open up the conversation between you and your supervisor during the performance evaluation meeting.
- Allows you to highlight any obstacle you overcame to improve your performance from a prior review period.
- Allows you to address any concerns and struggles you may have as you relate to the job.
- Provides you an opportunity to document your accomplishments and strengths.

Consider answering these five questions to provide [supervisor] with important feedback about your performance:

1. Describe your most significant accomplishments this year.
2. Describe any barriers or challenges that impacted you in effectively completing your job responsibilities or accomplishing your goals.
3. List your area(s) of strength and area(s) of improvement.
4. What skills or new knowledge would you like to develop to improve your performance?
5. Is there any other information you would like to share with your supervisor regarding your work performance?

Be a part of your growth and success! When rating your performance, keep the following rating definitions in mind: **Exceptional, Meets, Does not meet.**

[These are defined on this page.]

**Resources are included.**

NOTE: Though self-evaluations are recommended, if you choose not to complete a self-evaluation you may submit your review to your supervisor by going to "Next Steps" and "I acknowledge," which indicates that you acknowledge that you were given the opportunity but choose not to submit a self-evaluation.

[Next](#)

In the following sections, any comments, uploaded documents, and linked journal entries are available for viewing.

Touchpoint conversations provide a great opportunity to discuss progress frequently throughout the year on how well job duties are being performed. **Note:** Rating is not available during Touchpoints.

When reviewing each job duty, you can add comments below in the text box provided. "Save & Share" will allow anyone who opens the performance review to read the comments. "Save as Draft" will only make a comment visible to the person who enters it. You can also associate journal entries (which can be added at any time using the "Journal entry" feature at the top right of the system screen) or upload files for supporting documentation by selecting the drop-down menu next to the "Add comment" button. Commenting and journaling are great features to use throughout the year to document accomplishments and other details of performance.

Following is the rating scale:

- **Exceptional** = The employee significantly exceeds expectations as noted in job duties and performance goals. They model behaviors that support Virginia Tech's values and college/unit expectations. The employee's contributions have a consistently positive impact and value to the department and to the organization. This employee is easily recognized as a top performer.
- **Meets** = The employee consistently demonstrates effective performance by meeting expectations as defined by job duties and performance goals. They are viewed as someone who gets the job done and effectively prioritizes work. They contribute to the overall objectives of the department and/or the organization.
- **Does not meet** = The employee does not meet expectations as defined in the job duties and performance goals. This may be due to being new to a role or new to a specific assignment; it may also reflect outcomes and/or behaviors that need attention and do not meet expectations for the role. Steps to improvement should be discussed and documented.

The employee will see each of their job duties. To the right of the job duty will have a light gray box with a rating showing, as shown in Figure 1.

Ratings, as shown in Figure 2., have 3 filled stars for Exceptional, 2 filled stars for Meets, and 1 filled star for Does not meet.

Hovering over the stars provides a short explanation of each. Select the star to rate.

FIGURE 1. RATING EXAMPLE



FIGURE 2. RATING OPTIONS



These ratings are the same for Job Duties, Goals, and Overall Rating.

[Back](#)
[Next](#)



## Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

# Evaluation

Plan / Touchpoints / **Evaluation**

Touchpoint conversations provide a great opportunity to discuss progress frequently throughout the year on how well job duties are being performed. **Note:** Rating is not available during Touchpoints.

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[← Back](#)[Next →](#)

Please rate the overall performance below. **Note:** The overall rating is not available during Touchpoints.

You can add comments throughout the year by selecting the comments button. Comments can be shared or saved as private for your view only. To support your rating, you can add a journal entry or upload files by selecting the drop-down menu next to the add comment button.

**Rating Scale:**

- Exceptional** = The employee significantly exceeds expectations as noted in job duties and performance goals. They model behaviors that support Virginia Tech's values and college/unit expectations. The employee's contributions have a consistently positive impact and value to the department and to the organization. This employee is easily recognized as a top performer.
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If providing an overall rating of "Does not meet" or "Exceptional," provide supporting detailed documentation through comments, linking journal entries, or uploading documents. Supervisors should contact [Employee Relations](#) prior to giving an employee an overall rating of "Does not meet."

[← Back](#)[Next →](#)[In progress / Upcoming](#) [Completed](#) [Pending approval](#)[Add](#)

In progress:

There are no items to show

Booked:

There are no items to show

Suggested:

There are no items to show

This section is not rated.

Your comments

No comments made

Sue's comments

No comments made

The comments section is closed.  
However, learning activities can still be booked using the Add button.

[← Back](#)[Next →](#)





## Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

## Evaluation

Plan / Touchpoints / **Evaluation**

A self-evaluation will help you look back over the year and gain greater insights into your accomplishments, abilities, and strengths while also helping you set future goals for improvement.

Self-evaluations are optional. If you choose to skip this step, move your evaluation forward to the next stage. Select Next Steps and "I acknowledge," which indicates that you have either completed your self-evaluation or you choose not to complete a self-evaluation.

## Rating summary

## Rating summary

## ▼ 1st Yr/Probationary

1.

## ▶ Job duties

## ▶ Goals

## ▶ Overall rating

## Development summary

Title	Status	Intended completion date	Actual completion date

Your next step: Supervisor Evaluation of Employee

## Approval

By selecting "I acknowledge," you are either acknowledging that you have completed your self-evaluation or you choose not to complete a self-evaluation.

ⓘ Clicking "I acknowledge" will move this review to the next step and you will be unable to return to this step

☒ **Notify Jennifer after you approve**

Sarah, do you approve your review?

I acknowledge

[View entire process](#)

## Final comments

## Employee

**B** **I** **U** **Link** **Table** **Image** **Video** **Source**

The employee can add final comments regarding their review here.

Supervisor  
commentReviewer  
comment



## Following the sections: Employee

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

## Evaluation

[Plan](#) / [Touchpoints](#) / [Evaluation](#)**Welcome, [employee] to your self-evaluation.**

The self-evaluation is your opportunity to take an active role in the evaluation process. Rather than being the recipient of feedback from your supervisor, it gives you the opportunity to have a two-way conversation with them about your performance throughout the year.

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Following are reasons for a self-evaluation:

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- Provides you an opportunity to document your accomplishments and strengths.

Consider answering these five questions to provide [supervisor] with important feedback about your performance:

1. Describe your most significant accomplishments this year.
2. Describe any barriers or challenges that impacted you in effectively completing your job responsibilities or accomplishing your goals.
3. List your area(s) of strength and area(s) of improvement.
4. What skills or new knowledge would you like to develop to improve your performance?
5. Is there any other information you would like to share with your supervisor regarding your work performance?

Be a part of your growth and success! When rating your performance, keep the following rating definitions in mind: **Exceptional, Meets, Does not meet.**

[These are defined on this page.]

**Resources are included.**

NOTE: Though self-evaluations are recommended, if you choose not to complete a self-evaluation you may submit your review to your supervisor by going to "Next Steps" and "I acknowledge," which indicates that you acknowledge that you were given the opportunity but choose not to submit a self-evaluation.

[Next](#)

In the following sections, any comments, uploaded documents, and linked journal entries are available for viewing.

Touchpoint conversations provide a great opportunity to discuss progress frequently throughout the year on how well job duties are being performed. **Note:** Rating is not available during Touchpoints.

When reviewing each job duty, you can add comments below in the text box provided. "Save & Share" will allow anyone who opens the performance review to read the comments. "Save as Draft" will only make a comment visible to the person who enters it. You can also associate journal entries (which can be added at any time using the "Journal entry" feature at the top right of the system screen) or upload files for supporting documentation by selecting the drop-down menu next to the "Add comment" button. Commenting and journaling are great features to use throughout the year to document accomplishments and other details of performance.

Following is the rating scale:

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The employee will see each of their job duties. To the right of the job duty will have a light gray box with a rating showing, as shown in Figure 1.

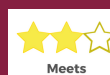
Ratings, as shown in Figure 2., have 3 filled stars for Exceptional, 2 filled stars for Meets, and 1 filled star for Does not meet.

Hovering over the stars provides a short explanation of each. Select the star to rate.

FIGURE 1. RATING EXAMPLE



FIGURE 2. RATING OPTIONS



These ratings are the same for Job Duties, Goals, and Overall Rating.

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Following the sections: Supervisor

[Start](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)[Next steps](#)

# Evaluation

[Plan](#) / [Touchpoints](#) / [Evaluation](#)

## ACKNOWLEDGEMENT

Welcome, [employee], to the acknowledgement stage of your evaluation.

Following your discussion with your supervisor about your performance evaluation, it is now time to review and acknowledge the receipt of your evaluation. Acknowledgment of the evaluation does not indicate acceptance. If you have questions about the evaluation, contact your supervisor or HR representative. Additional resources are available below.

Even though this year's performance evaluation is complete, performance management is a continuous process for both you and your supervisor. Continue to check in frequently with you supervisor to build collaboration and stay on track to success!

Resources:

- [Performance Management Resources](#)
- [Performance Evaluations website](#)
- [Performance Management website](#)

[Next](#)[Job duties](#) **NEW**[Goals](#)[Overall rating](#)[Development plan](#)

All of these sections will be uneditable. Review the ratings and comments.

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Before acknowledging the review, ensure you have discussed your performance evaluation with your supervisor. Acknowledgment of the evaluation does not indicate acceptance. If you have questions, please contact your supervisor or HR representative.

Opening the accordion using this icon will show all the ratings.

Both employee self-evaluation and supervisor evaluation will be shown.

### Rating summary

#### Rating summary

Supervisor

Employee

#### Job duties

- Professional Development Program Delivery
- Organizational Development Program Delivery

Meets  
MeetsMeets  
Meets

#### Goals

- Supervise Talent Development (TD) wage hires
- Collaborate with Employee Relations (ER) on annual performance management training

Meets  
MeetsMeets  
Meets

#### Overall rating

- Please provide an overall rating

Meets

Meets

Your next step: Complete

### Approval

Before acknowledging the review, ensure you have discussed your performance evaluation with your supervisor. Acknowledgment of the evaluation does not indicate acceptance. If you have questions, please contact your supervisor or HR representative.

Clicking "I acknowledge" will move this review to the next step and you will be unable to return to this step

☒ Notify Jennifer after you approve

Sarah, do you approve your review?

I acknowledge

[View entire process](#)