



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 and selecting PageUp LMS.
2. Access the performance review through either the widget as shown in Figure 1 and Figure 2 or through the Navigation Bar:

My team > Performance Reviews

FIGURE 1. DASHBOARD WIDGET

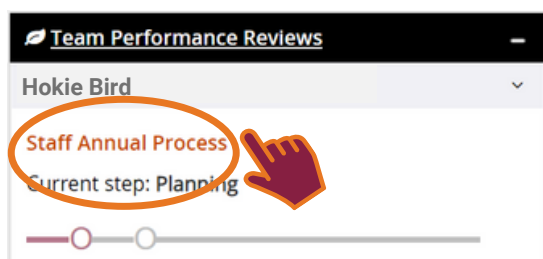


FIGURE 2. DASHBOARD WIDGET WITH ACTION REQUIRED

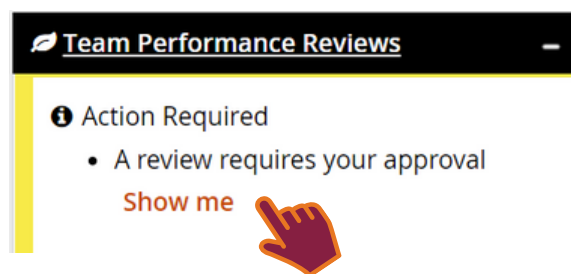


FIGURE 2. STAFF ANNUAL PERFORMANCE SECTIONS



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 ^{NEW} 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.

-

Resources:

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

Next ➔

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."

Item title

Title *

Please enter job duties title here ...

Measure

B *I* U | Source

REQUIRED

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

Next →



Following the sections: Supervisor

[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 | | | | | | | | Source
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: Supervisor

[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

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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 [employee], 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](#)



Following the sections: Supervisor

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

Plan APPROVAL

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

Welcome to the performance plan approval stage for [employee].

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

If edits need to be made, you as the supervisor will need to move the plan back to the planning step. For guidance, please review a training aid, [Moving the Review Back a Step for Supervisors](#).

If you have questions about the performance planning steps or performance management, contact your college or department's HR representative or Employee Relations.

Resources:

- [Moving the Review Back a Step for Supervisors](#)
- [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.

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- Once you have discussed and agreed on the performance plan with [employee], you must select "I acknowledge" below. Both you and your employee must acknowledge before you will move to the Touchpoints section of the performance cycle. By selecting "I acknowledge," you are attesting that you have involved the reviewer if necessary. If you need to make edits to this plan, a training aid, [Moving the Review Back a Step for Supervisors](#), is available.

❗ 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.

Sarah has not approved this review

Jennifer, as the manager, do you approve Sarah's review?

[I acknowledge](#)[View entire process](#)



Following the sections: Supervisor

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

Touchpoints

Plan / [Touchpoints](#) / Evaluation

Welcome to Touchpoints with [employee].

Effective performance management begins with mutual respect and ends with performance excellence. As a supervisor, it is important to communicate with your employee frequently throughout the year. Conversations should be grounded in honest communication and provide clear role expectations, feedback, performance successes and improvements, development opportunities, and career possibilities.

Touchpoints are regular meetings between a supervisor and an employee where you have ongoing discussions about an employee's performance before you get to the annual review and the end of the year. During Touchpoint meetings, record and document ongoing discussions with [employee] to include in their 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, including how to [update a plan](#).

It is important that your employee participates fully in these conversations, understands their role responsibilities and expectations, and communicates any obstacles or training needs to perform at an optimum level.

Touchpoint conversations will enable you to keep your team on track and complement employee engagement!

Watch a video: [Starting Something New](#)

[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

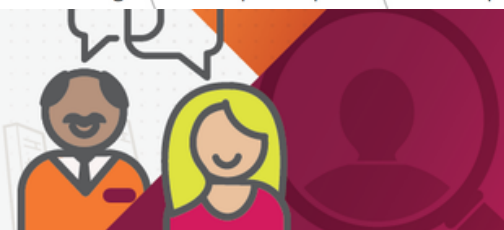
Plan / Touchpoints / [Evaluation](#)



Following the sections: Supervisor

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

Evaluation

[Plan](#) / [Touchpoints](#) / [Evaluation](#)**Welcome to the evaluation for [employee].**

The evaluation documents how well an employee has met the expectations defined in the performance plan. During this step, you will rate [on their job duty performance and progress toward the goals that were set during the planning phase. Take time throughout this step to ensure that you get a complete and well-rounded review of each goal. Analyze the actions taken toward completion of goals, work habits demonstrated by the employee, and achievements during the year. You are encouraged to provide specific examples to support your ratings. See the additional resources below for more information.

When rating employee performance, keep the following rating definitions in mind: **Exceptional, Meets, Does not meet.**
[These are defined on this page.]

If you have questions about the evaluation or performance management process, contact your HR Representative or Employee Relations.

Resources:

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

[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 supervisor will see each of the 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. The employee will have a self-evaluation rating above the supervisor's rating.

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

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Evaluation

Plan / Touchpoints / **Evaluation**

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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:

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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.

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Start Job duties ^{NEW} Goals Overall rating Development plan Next steps

Plan / Touchpoints / Evaluation

- The supervisor must add a final comment below to complete the evaluation. This comment is seen by both the employee and the reviewer.

No comments made

[View entire process](#)



Following the sections: Supervisor

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

Evaluation

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DISCUSSION

The evaluation for [employee] has been approved by the reviewer.

Please schedule a meeting with [employee] to discuss their first six months of performance. Additional resources are provided below.

After you and the employee have discussed the evaluation, select "Next Steps" above and approve this step. This will send the evaluation to the employee for them to acknowledge as the final step in the annual performance management process.

Even though this year's performance evaluation is complete, performance management is a continuous process for both the supervisor and employee. Remember to use Touchpoint conversations as a way to frequently check-in with your employee throughout the year.

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.

[Back](#)[Next](#)**Before this step is approved, the supervisor and employee should meet and discuss the performance evaluation.****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**

1. Professional Development Program Delivery
2. Organizational Development Program Delivery

Meets

Meets

Meets

Meets

► **Goals**

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

Meets

Meets

Meets

Meets

► **Overall rating**

1. Please provide an overall rating

Meets

Meets

Your next step: Employee Acknowledgement

Approval

Before this step is approved, the supervisor and employee should meet and discuss the performance evaluation.

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

Jennifer, as the manager, do you approve Sarah's review?

[I acknowledge](#)[View entire process](#)