



Access and Overview

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

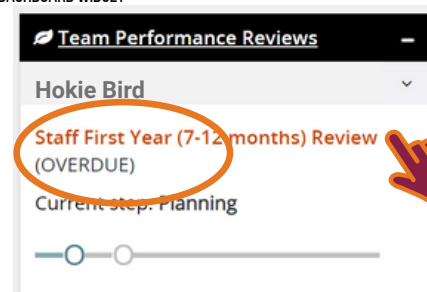
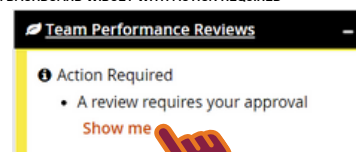
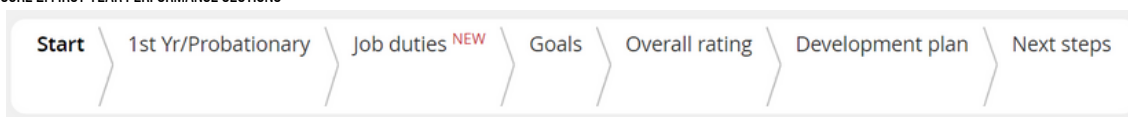


FIGURE 2. DASHBOARD WIDGET WITH ACTION REQUIRED



ACCESS

FIGURE 2. FIRST YEAR PERFORMANCE SECTIONS



0-6 MONTH

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

7-12 MONTH

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

Following the sections: Supervisor

Plan

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

Congratulations on your new team member!

To ensure a successful first year of employment for [employee] at Virginia Tech, it's important for you to check in with your employee frequently and provide constructive feedback as they learn their new role.

Additionally, you will provide [employee] with an enhanced first-year review, which includes a review at six months. As a supervisor, it is important that you check in with your employee regularly. These check-ins are called Touchpoints and give you and your employee the opportunity to have collaborative discussions that support their success. Understanding their performance progress will help your employee be successful.

As you begin performance conversations, please note the following:

- If the employee is a new hire to the university with either no service at another state agency, had a break in service before transferring from another state agency, or is a transfer within the university to a position that requires a probationary period per the offer letter, this is their probationary year. Information on the probationary review process can be found at University Policy No. 4260: Probationary Period for Salaried University Staff Employees. Please discuss with [employee] and identify if this is a probationary or first-year process in the "1st Yr/Probationary" section.
- If the new employee is transferring from another Virginia state institution or facility without a break in service, this is their first-year review.

You must indicate if this is or is not a probationary period in the "1st Yr/Probationary" section.

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

- Next, you will see the employee's Job Duties, which are pulled from the position description in the PageUp Applicant Tracking System (ATS). If updates are needed to the PageUp ATS position description, contact your college or department HR representative.
- In the Goals section, record any goals that are specific to the employee 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 the position.
- In the Development Plan section, consider what will help the employee develop in their role. You may assign Learning Management modules for specific learning opportunities.

After you and [employee] discuss and agree on the performance plan, 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. If you have questions about the performance planning steps or performance management, contact your college or department's HR representative or Employee Relations.

We hope the tools this system provides will be helpful as you lead your employee through their first year with Virginia Tech. If you need help determining if they are in a probationary period or have questions, contact your HR representative.



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

Resources:

- [Writing a job description](#)
- [Performance Management Resources](#)
- [Performance Management website](#)



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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

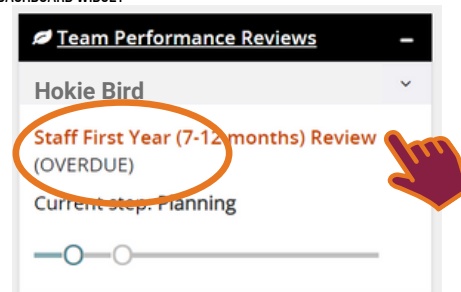


FIGURE 2. DASHBOARD WIDGET WITH ACTION REQUIRED

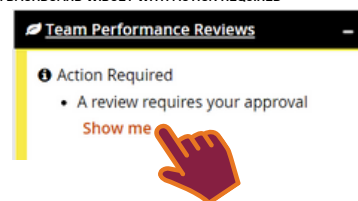
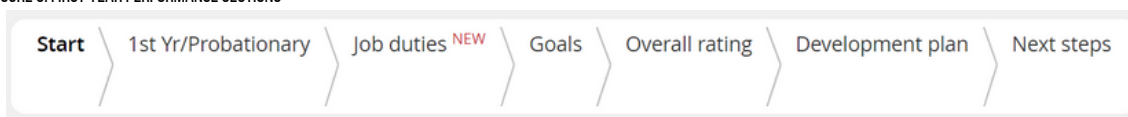


FIGURE 3. FIRST YEAR PERFORMANCE SECTIONS



- 0-6 MONTH**
1. Performance Plan
 2. Plan Approval
 3. Touchpoints
 4. Supervisor Evaluation of Employee
 5. Reviewer
 6. Supervisor/Employee Discussion
 7. Employee Acknowledgement

- 7-12 MONTH**
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

Following the sections: Supervisor

Plan

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

Your team member, [employee], is now starting their second six months with your team!

The employee's performance plan for their 0-6 months review has been copied into this cycle. Schedule a Touchpoint conversation with your employee to review the plan again before moving forward.

To ensure a successful first year of employment for [employee] at Virginia Tech, it's important for you to continue checking in with them frequently and provide constructive feedback as they grow and develop in their new role. Continue to use Touchpoint conversations and this system to document your meetings and ensure [employee] understands your expectations and their performance toward those expectations.

We hope the tools this system provides will be helpful as you lead your employee through their second six months with Virginia Tech. If you have questions or need additional information, contact your HR representative.

Resources:

- [Performance Management website](#)



Following the sections: Supervisor

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

Plan

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

The box below is to be used to specify if this review is a Probationary Review or First-Year Review. To determine if the employee is a first-year or probationary employee, consider the following:

- **First year:** If the employee transferred from another Virginia state institution or facility without a break in service, this is their first-year review.
- **Probationary:** New Virginia State employees and employees returning from a break in Virginia State employment are considered probationary employees for their first 12 months of university employment.

Please note that:

- An employee who has transferred within the university to a position that requires a probationary period stated in the offer letter, the 12-month probationary period applies.
- A probationary period is not required when an employee has already completed a probationary period at another Virginia state employment AND when the employee is transferring from another state agency or another Virginia Tech department without a break in service, unless stated in their offer letter.
- An employee who is selected for a position that requires certification following completion of a prescribed training program must complete a new probationary period.
- If an exception was granted to a probationary employee, and this information was included in the offer letter, the employee is not considered probationary.
- Information on the probationary review process can be found in [University Policy No. 4260: Probationary Period for Salaried University Staff Employees](#).

If you have questions regarding the type of review to be conducted, please contact your HR Representative or Employee Relations.

Item title

Title*

Please enter 1st Yr/Probationary title here ...

REQUIRED

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

If required information is missing, the pages will not progress nor will you be able to finish the plan.
The only way to restart is to go [Home](#).

[Back](#)[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: Supervisor

Start

1st Yr/Probationary

Job duties **NEW**

Goals

Overall rating

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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

1st Yr/Probationary

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

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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
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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

1st Yr/Probationary

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.

← Back

Next →

- 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

1st Yr/Probationary

Job duties ^{NEW}

Goals

Overall rating

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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 →

1st Yr/Probationary

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 supervisor evaluation for 0-6 months and the employee self-evaluation for 7-12 months before moving to the supervisor evaluation. Once 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

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Evaluation

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Welcome to the first-year (0-6 month) evaluation for [employee]. **OR** Welcome to the first-year (7-12 months) evaluation for [employee].

During the first-year review, the evaluation documents how well an employee is progressing toward learning their role. During this step, you will rate [employee] on their progress. Take time throughout this step to ensure that you get a complete and well-rounded review of how the employee is doing in their new role. Analyze the actions taken to learn the job, 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](#)

1st Yr/Probationary

This section is not rated.

[Back](#)
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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. If applicable, 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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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.

When reviewing each goal, 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.

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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:

- **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.

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."

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[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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Evaluation

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❗ Cannot progress the review to the next step

- Manager final comment missing [Add a comment](#)

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

Rating summary

Rating summary

▼ 1st Yr/Probationary

1.

▶ Job duties

▶ Goals

▶ Overall rating

Development summary

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

Final comments

Employee

No comments made

Supervisor

B **I** **U** | | | | | | | | Source

Reviewer

No comments made

Your next step: Review

❗ 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](#)



Following the sections: Supervisor

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Evaluation

Plan / Touchpoints / Evaluation

DISCUSSION

The first-year (0-6 month) 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 first six-month performance management process.

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 during the next six months as they continue in the first year of their role.

Welcome, [supervisor].

The evaluation for [employee] has been approved by the reviewer. Please schedule a meeting with [employee] to discuss their first-year (7-12 months) 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 of the first-year (7-12 months) performance management review.

Remember, 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 during the next six months as they continue in the first year of their role.

Resources:

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

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[1st Yr/Probationary](#)
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All of these sections will be uneditable. Review the ratings and comments.

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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, if applicable.

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: Employee Acknowledgement

Approval

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

i 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](#)