

Non-Supervisor, Supervisor, Coaches Annual and Position Orientation Evaluation Instructions

PageUp Performance Management



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### HR 17.04-06/20

### **Policy**

UWF shall utilize employee evaluation programs to acknowledge performance; to communicate performance effectiveness; to aid in improving performance in assigned duties; and when necessary, to develop a performance plan to assist in correcting deficiencies. The evaluation program may also be used to identify recipients of financial rewards when designated by the President.

https://confluence.uwf.edu/x/AoOoAg



### **Performance Review Roles**

### **Employee Role**

- Employee Acknowledges Objectives (Performance Review Step 2)
- Employee Self-Evaluation (including adding Significant Accomplishments and Attachments) (Performance Review Step 3)
- Employee Acknowledges Evaluation (Performance Review Step 5)

### Supervisor Role

- Supervisor Creates Objectives (Performance Review Step 1)
- Supervisor Evaluation of Employee (Performance Review Step 4)



### **Evaluation Types**

**Position Orientation**–All University Work Force employees shall be evaluated at the end of the twelve month position orientation year (one year from the employee's date of hire).

- Newly-hired employees shall be provided with a current position description and a list of goals, objectives, and/or standards at the time of appointment to the position.
- All newly-hired University Work Force employees shall be evaluated at the end of their position orientation year. Newly-hired employees shall be evaluated by the immediate supervisor no later than 30 days after 12 months of employment with the University.
- Employees who are not evaluated by their immediate supervisor within 30 days after 12 months of employment with the University, will automatically be rated at a **Satisfactory** performance standard if the supervisor has not requested an extension and the evaluation shall be moved to a status of complete by Human Resources.
- Employees who have been evaluated, but have not acknowledged their position orientation evaluation within 30 days after their 12 months of employment with the University, shall automatically receive the rating assigned by their supervisor, and the evaluation will be moved to a status of complete by Human Resources.
- If the supervisor during the position orientation year is no longer with the University, the employee shall be automatically rated at Satisfactory performance standard.
- If the employee is supervised by multiple supervisors during their position orientation evaluation year, the supervisors should collaborate on the completion of the employee's evaluation.
- Supervisors should hold discussions with new employees during the position orientation year to provide feedback and to ensure that performance goals and objectives are communicated.
- The position orientation year may be extended by the Associate Vice President of Human Resources for no more than a 3-month period, upon written request from the appropriate supervisory authority.
- Employees serve only one position orientation year. Thus, employees who change positions within the University, will not be required to serve another position orientation year.



### **Evaluation Types (continued)**

Annual - Employees shall be evaluated annually July 1 to June 30 by their immediate supervisor.

- Employees shall be evaluated annually in July by their immediate supervisor. All annual evaluations are due on September 30th. Any overall rating below Satisfactory must be handled as a Special Performance.
- Failure to complete an annual evaluation on the employee by October 31<sup>st</sup> shall result in the employee automatically receiving a rating at the same level as the most recent completed evaluation, if the supervisor has not requested an extension.
- Employees who are evaluated but have not acknowledged their annual evaluation by October 31<sup>st</sup>, shall automatically receive the rating assigned by the supervisor, and the evaluation will be moved to a status of complete by Human Resources.
- If the supervisor during the annual evaluation period is no longer with the University, the employee shall automatically receive a rating at the same level as the most recent completed evaluation.
- If the employee is supervised by multiple supervisors during the annual evaluation period, the supervisors should collaborate on the completion of the employee's annual performance evaluation.
- Performance Standards Ratings shall be defined as follows for the University Work Force employees:
  - Superior
  - Above
  - Satisfactory
  - Needs Improvement
  - Below
- Employees rated at **Below** or **Needs Improvement** shall be subject to a Special Evaluation and Improvement Plan as outline in Section (2) (c) of the HR-17.04-06/20 policy.



### **Evaluation Types (continued)**

**Special**–May be initiated whenever the immediate supervisor determines the employee's performance has changed from the rating level reflected on the most recent evaluation.

- A Special Performance Evaluation must be initiated when and employee's performance is at a level of **Below** or **Needs Improvement**. The Special Performance Evaluation should be initiated by the supervisor after consultation with Human Resources for employees who have successfully completed the orientation year and should not be delayed until the time of the annual performance evaluation.
- Special performance evaluations may only cover performance for the preceding sixty days.
- The immediate supervisor, after consultation with Human Resources, shall prepare a written Improvement Plan that specifies the necessary improvements to correct identified performance deficiencies. The written Improvement Plan shall be provided to and discussed with the employee on an ongoing basis by the supervisor.
- Within sixty days after the Special Performance Evaluation and Improvement Plan initiation, an employee with a **Needs Improvement** or **Below** rating who does not meet the requirements of the Improvement Plan, may be dismissed from the University after consultation with the Associate Vice President of Human Resources.



### Non- Supervisor Standard Evaluation Competencies

- Knowledge, Skills and Abilities-Employee has the knowledge, skills, and abilities needed in the present position.
- **Quality/Quantity of work-**Employee has the ability to independently plan, prioritize, and complete work with accuracy, neatness and at a satisfactory rate.
- **Customer Service Skills-**Employee is committed to providing excellent customer service to internal and external customers and willingly cooperates with others to achieve department and University goals. Employee demonstrates a positive attitude toward others and exhibits flexibility and adaptability in meeting the demands of change in the workplace.
- Attendance-Employee is punctual, adheres to work schedule and complies with attendance and leave policies.
- **Initiative**-Employee exhibits leadership, is resourceful and willing to do more than the minimum, strives to achieve goals and seeks additional responsibility.
- **Inclusiveness-**Employee promotes the idea of awareness, acceptance and respect towards our diverse campus community in the ways in which they are different and the ways in which they are similar.



### Supervisor Standard Evaluation Competencies

- Knowledge, Skills and Abilities-Employee has the knowledge, skills, and abilities needed in the present position.
- Quality/Quantity of work-Employee has the ability to independently plan, prioritize, and complete work with accuracy, neatness, and at a satisfactory rate.
- Customer Service Skills-Employee is committed to providing excellent customer service to internal and external customers and willingly cooperates with others to achieve department and University goals. Employee demonstrates a positive attitude toward others; and exhibits flexibility and adaptability in meeting the demands of change in the work-place.
- Attendance-Employee is punctual, adheres to work schedule, and complies with attendance and leave policies.
- Initiative-Employee exhibits leadership, is resourceful and willing to do more than the minimum, strives to achieve goals, and seeks additional responsibility.
- Inclusiveness-Employee promotes the idea of awareness, acceptance and respect towards our diverse campus community in the ways in which they are different and the ways in which they are similar.
- Integrity Employee projects a positive image as a leader within the University; promotes, enforces, and takes action consistent with the current policies and procedures; takes responsibility for personal actions; keeps commitments; and displays strong moral principles. Employee leads by example, does the right thing when no one is looking, and is able to be trusted consistently.
- **Communication** Employee clearly and effectively conveys information that expresses thoughts, facts, and the University's mission; demonstrates effective use of listening skills; encourages and supports openness to other peoples' ideas and thoughts; and ensures important matters are shared with all appropriate parties.
- Collaboration Employee shares time, energy, knowledge and skills with others for the betterment of the University; offers assistance and support when needed; creates an atmosphere where employees feel empowered to perform their duties with decision-making authority within their areas of responsibility; works cooperatively and effectively with others to achieve common goals; and resolves interpersonal conflicts constructively.
- **Performance Management** Employee sets measurable objectives (quantitative and/or qualitative) for direct reports(s) aligned with the department's (and University's) strategic plan; provides regular feedback on performance as measured against goals; addresses performance issues promptly; fosters direct report's learning and development opportunities; provides public and private recognition of accomplishments; and completes direct report's performance review as assigned, including written feedback on competency scores above or below a rating of "3 Stars."



### Coach Standard Evaluation Competencies

- **Coaching Success and Skills** Employee displays adequate knowledge and technical skill for specific sport, defines and communicates the program's overall purpose and philosophy, and works to achieve program goals while creating a safe environment for student-athletes. Employee communicates effectively with student athletes, maintains awareness of team behavior and activities outside of practice, and handles discipline measures in a consistent and professional manner.
- Academics and Life Skills Employee provides full access to the resources of student-athlete support services for all team members, represents the mission of UWF in promoting academic achievement, encourages participation in life skills workshops, and maintains a graduation rate consistent with departmental objectives.
- **Compliance** Employee demonstrates appropriate knowledge and understanding of NCAA rules and regulations; completes all necessary or required NCAA documents in a timely manner; and commits to the strong adherence to NCAA, conference, institutional, and departmental rules and regulations. Employee works to establish a recruiting system consistent with the department's philosophy and researches recruit backgrounds thoroughly.
- **Fiscal and Departmental Responsibility** Employee stays within allocated budget, adheres to business office policies and procedures, and manages resources properly. Employee follows departmental directives and meets deadlines for completing or returning required documentation.
- **External Relations** Employee works closely with Athletic Communications, Marketing, the Argonaut Athletic Club, and the media to assist in cultivating positive relationships with alumni, campus community and the surrounding community while promoting their respective sport. Employee participates in fundraising events, shows a willingness to support University functions, and develops opportunities for student-athlete community engagement.
- **Professionalism**/ **Inclusiveness** Employee displays a positive and professional manner while exercising appropriate behavior at all times. Employee welcomes, respects, and celebrates the ways in which people and ideas are different and the ways in which they are similar.



### **Performance Standard Rating Scale**

- 1.0 to 1.4 Below Performance
- > 1.5 to 2.4 Needs Improvement Performance
- 2.5 to 3.4 Satisfactory Performance
- > 3.5 to 4.4 Above Performance
- ➢ 4.5 to 5.0 Superior Performance



- **Superior**–Employee significantly exceeds position requirements.
- **Above**–Employee consistently exceeds expectations and demonstrates ability to surpass position requirements.
- **Satisfactory**–Employee meets all position requirements.
- **Needs Improvement**–Employee is not satisfactorily completing the assigned duties. Supervisors will be contacted by Human Resources upon submission of an employee evaluation with an overall rating of Needs Improvement.
- **Below**–Employee is not meeting standards, goals, or objectives set for the position. *Supervisors will be contacted by Human Resources upon submission of an employee evaluation with an overall rating of Below.*



Annual evaluations are conducted at the end of each fiscal year. The evaluation period runs July 1 through June 30.

All steps in the performance review must be completed by September 30 of each year.

If a supervisor has not requested and been granted an extension, failure to complete an annual evaluation on an employee by October 31<sup>st</sup> shall result in the employee automatically receiving a rating at the same level as the most recent completed evaluation.

An employee who has been evaluated but has not acknowledged their annual evaluation by the due date, shall automatically receive the rating assigned by the supervisor, and the evaluation will be moved to a status of complete.

Per <u>HR 17.04-06/20 policy.</u>



### **Performance Evaluation Workflow**

for Position Orientation/Annual Non-Supervisor, Supervisor and Coach Evaluations





### Logging into PageUp Performance Management

# Log into MyUWF, search for PageUp, and click on the PageUp app.





- The Supervisor will log into PageUp Performance Management and create objectives for the employee's next review period under the "Current Year Objectives" section. The supervisor will click on "add objective," or to delete an objective, the supervisor will click the trash can icon in the upper right corner of the objective. Please make sure to save a copy of the objectives.
- The evaluation will automatically save any changes/updates made, so you may close the program and come back to it at a later time.
- The supervisor will meet with the employee to discuss the objectives and address any questions or concerns.
- Please see the step by step instructions and images on the following pages.





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### **Supervisor Creates Objectives**





Weak/Immeasurable Objective: Improve computer skills.

Better Objective: Improve efficiency in MS Word, PowerPoint, and Excel by completing assigned courses offered via LinkedIn Learning.

Weak/Immeasurable Objective: Improve customer service skills.

Better Objective: Improve customer service skills by attending customer service, communication, and diversity training.

Weak/Immeasurable Objective: Improve supervisory skills.

Better Objective: Improve supervisory skills by attending workshops such as "Conflict in the Workplace" and "The Power of Positive Discipline" as well as other trainings included in H.R.'s Leadership and Management Certificate program to better understand how to handle employee issues.





As a supervisor, it is now time to create the **Objectives** for Lynne Randall. These **Objectives** allow you to set proper and clear expectations of how Lynne will be successful in their role. Once you have created the **Objectives**, Lynne will be given the **Objectives** to review and acknowledge.

Click NEXT to move to the next page to Add Objectives.

After reading the instructions, click "Next" at the bottom of the page

Next 🔶



| Start Cur   | rent Year Objectives  | Employee Significant Accom  | plishments   | Attachments /  | Supervisor Evaluation  | of Employee  | Next steps   |   |   |
|---|---|---|--|--|--|--|--|---|---|
| Current Year O  | bjectives   |   |  |  |  | ✓ Saved  | Last saved: 3 Nov  | 2022, 9:37am  | Actions 🕶                                       |
| Setting object<br>year. These o<br>development<br>job training, j<br>The supervise<br>Performance | tives is the first step of<br>ibjectives should align v<br>goals or learning objec<br>ob-shadowing, professi<br>or will meet with the en<br>, or their own progress | the Performance Management<br>vith your department's objective<br>tives with the employee at this<br>ional development courses, con<br>nployee throughout the year to<br>tracking tool to capture and tra | process The sup<br>es and with <b>UWF</b><br>time. Profession<br>iference attendai<br>discuss progress<br>ck progress If a | pervisor will m<br>F's Strategic P<br>hal developmer<br>nce, etc.).<br>s. Both the sup<br>supervisor use | eet with the employee to<br>lan. The supervisor may<br>it goals should include h<br>ervisor and employee m<br>is the PageUp features, ti | discuss and s<br>also want to d<br>ow the skills/k<br>ay use the <b>Jou</b><br>hev should be | et SMART Goals<br>liscuss and recor<br>nowledge will be<br>mnaling or 1-on-<br>sure to include | /Objectives<br>d any profess<br>developed (d<br>1 features in<br>the employee | or the<br>sional<br>on the<br>PageUp<br>name in |
| the comment<br>Note: Comme  | ts section to track and a   | shared within the review, either  | ut the year.   | in the review p  | rocess.  |  |  |   |   |
| Employee:   | The employee has no<br>Employee Acknowled<br>objectives is reserved   | action steps in PageUp Perform<br><b>Iges Objectives</b> step of the pro<br>for supervisors.  | iance while th <b>e</b> s<br>ocess. <u>Please Not</u>  | upervisor is se<br><u>e</u> : The employ   | tting objectives. The emp<br>ee should not click on the  | oloyee will ack<br>e +Add Object   | nowledge the ob<br>ives (Supervisor (  | jectives in th<br>ONLY) box; a  | e<br>dding                                      |
| Supervisor:   | The supervisor will Clic<br>upper right corner of t<br><b>Step</b> will advance the r   | :k + Add Objectives to add an o<br>he objective. Once they have er<br>review to Employee Acknowle   | objective to an el<br>ntered all objectiv<br>dges Objectives   | nployee's revi<br>ves, they will c   | ew. To delete an objective<br>ick <b>Next</b> box(s) until they  | e, the supervis<br>y reach <b>Go to</b>  | or will click the ti<br><b>Next Step.</b> Clicki   | rash can icon<br>ng on <b>Go to</b> l   | in the<br>Next                                  |
|   |   |   |  | The show   |  |  |  |   |   |
| Add Objective   | ve (Supervisor ONLY)  | Ple   | the top of   | the page   | displays   |  |  |   |   |
| <b>←</b> Back   |   | rev   | view sectio  | ons, not re  | eview steps.   |  |  |   | Next 🗲  |

Be sure to align the SMART Goals/Objectives for the fiscal year to UWF"s current Strategic Plan. Ask for assistance from your supervisor if needed.

Follow the specific Supervisor instructions in the yellow box to enter each objective. Be sure to click each "Next" button at the bottom of the page until you move through all the sections of the review and reach "Go to next step."

For additional assistance with the Journaling or 1-on-1 features, reach out to the Human Resources Employee Relations Coordinator.

Thank you for entering Lynne Randall's Objectives.

Click "Go To Next Step" to complete this part of the review process.

Your employee will receive an email directing them to log into the review and acknowledge their Objectives.



Click "Go to next step" to complete this part of the review process and to advance the review to the "Employee **Acknowledges** Evaluation" step.

Click "Back" if you need to return to a previous page.

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## **Objectives Review Meeting**





After you enter objectives for your employee, meet and discuss the objectives addressing any questions or concerns. If you need to edit an objective, contact the Employee Relations Coordinator to request the review be returned to the "Supervisor Creates Objectives" step in the review process.

## **WEST FLORIDA Employee Acknowledges Objectives**





### **Employee Acknowledges Objectives**



You (the employee) will log into the PageUp Performance Management to access the review and acknowledge objectives.

1. Click on "About me" and then "Performance reviews" or click on the "Annual Review" link for the correct review.

### **Employee Acknowledges Objectives**



#### ACKNOWLEDGING OBJECTIVES:

- 1. Click Next to review and acknowledge objectives.
- Continue clicking Next on the bottom right side of the page (advancing through all the sections in the chevron image at the top of the page), until you reach the page which displays the Acknowledge now bolded text in the pink box.
- 3. Once you click the Acknowledge now text, you will be redirected to the start page where you will click the Confirm button in the lower left portion of the page. You will then select the Next steps section in the chevron image at the top of the page. Once you have clicked Next steps, you will be directed to the final page where you will select Go to next steps on the bottom of the page. Clicking Go to next steps will send a notice to your supervisor that you have acknowledged your objectives and move the review to Evaluating Period.

(You may want to copy and paste these directions into a Word document or notes page for reference.)

- Read and follow the directions.
- 2. Copy and paste the directions into a Word document for ease of access to instructions.

✓ Confirm

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### **Employee Acknowledges Objectives**

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| Start     Current Year Objectives     Next steps       Current Year Objectives   | Saved Last saved: 11 jul 2022, 2:14pm Actions   | <ul><li>3. Review the information in the green box.</li><li>4. When complete, review</li></ul>  |
|--|---|---|
| Setting objectives is the first step of the Performance Mana<br>year. These objectives should align with your department's<br>development goals or learning objectives with the employe<br>job training, job-shadowing, professional development cou<br>The supervisor will meet with the employee throughout the<br>Performance, or their own progress tracking tool to captur<br>the comments section to track and access the comments the<br>Note: Comments may be private or shared within the revie | agement process. The supervisor will meet with the employee to discuss and set <b>SMART Goals/Objectives</b> for the objectives and with <b>UWF's Strategic Plan</b> . The supervisor may also want to discuss and record any professional event this time. Professional development goals should include how the skills/knowledge will be developed (on the rses, conference attendance, etc.).<br>a year to discuss progress. Both the supervisor and employee may use the <b>Journaling</b> or <b>1-on-1 features</b> in PageUp e and track progress. If a supervisor uses the PageUp features, they should be sure to include the employee name in hroughout the year.<br>w, either initially or later in the review process. | each objective entered by<br>your supervisor. The<br>objectives will display in<br>the bottom gray area of this<br>page and most likely |
| Employee: The employee has no action steps in PageUp<br>Employee Acknowledges Objectives step o<br>objectives is reserved for supervisors.   | Performance while the supervisor is setting objectives. The employee will acknowledge the objectives in the<br>f the process. <u>Please Note</u> : The employee should not click on the +Add Objectives (Supervisor ONLY) box; adding   | continue on the next page.  |
| Supervisor: The supervisor will Click + Add Objectives to<br>upper right corner of the objective. Once the<br>Step will advance the review to Employee Ad  | add an objective to an employee's review. To delete an objective, the supervisor will click the trash can icon in the<br>y have entered all objectives, they will click <b>Next</b> box(s) until they reach <b>Go to Next Step</b> . Clicking on <b>Go to Next</b><br><b>cknowledges Objectives</b> .   | 5. After reviewing the objective(s), click on "Next" at the bottom of the page.   |
| Add Objective (Supervisor ONLY)     Add Objective (Supervisor ONLY)  | Next →  |   |



6. Once you review

all objectives, click

bottom of the page until you reach the page to click

Clicking on

process.

the "Next" box at the

### **Employee Acknowledges Objectives**

O Cannot progress the review to the next step

If you have questions about the objectives, discuss them with your supervisor. Employees may review their objectives at any time by reviewing this page.

Click Acknowledge now to finalize this step

After you have acknowledged your objectives, this completes the process until the end of the evaluation period.

If desired, you may review objectives under the "Summary" before clicking "Acknowledge now."



## UNIVERSITY of Employee Acknowledges Objectives

Start Current Year Objectives Next steps 7. Click Last saved: 11 Jul 2022, 2:14pm Actions -"Confirm" on the lower left of the start page. 8. Once confirm is clicked, click on "Next ACKNOWLEDGING OBJECTIVES 1. Click Next to review and acknowledge objectives 2. Continue clicking Next on the bottom right side of the page (advancing through all the sections in the chevron image at the top of the page), until you reach the page steps" in the which displays the Acknowledge now bolded text in the pink box. 3. Once you click the Acknowledge now text, you will be redirected to the start page where you will click the Confirm button in the lower left portion of the page. You will then select the Next steps section in the chevron image at the top of the page. Once you have clicked Next steps, you will be directed to the final page where you will Chevron select Go to next steps on the bottom of the page. Clicking Go to next steps will send a notice to your supervisor that you have acknowledged your objectives and move the review to Evaluating Period. (You may want to copy and paste these directions into a Word document or notes page for reference.) image at the ✓ Confirm top of the Next -> page.



Once you click Acknowledge now, you have completed acknowledging your objectives.

Note: Employees may record progress notes and upload supporting documentation throughout the year by creating Journal or 1-on-1 entries.

OPTION 1: Click on the top right option called "+Journal Entry"

OPTION 2: Expand the "About Me" on the top left and select "Journal" or "1-on-1."

These entries are private unless you decide to share them by linking them to your review.

9. Click on "Go to next step" to complete acknowledging objectives and move the review to the next step in the process.

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| Current Year Objectives  |                              |                        |  |                    |   |   |
|--|------------------------------|------------------------|--|--------------------|---|---|
| L  |                              |                        |  |                    |   |   |
|  |                              |                        |  |                    |   |   |
| Vour pout stop. Fueluating Pou   | lod                          |                        |  |                    |   |   |
| Your next step: Evaluating Per   |                              | 0                      | 0  | 0                  | 0 | 0 |
| 0  | 0                            | 0                      |  | 0                  | 0 | 0 |
|  |                              |                        |  |                    |   |   |
|  |                              |                        |  |                    |   |   |
| Clicking "Go to next st  | p" will move this review to  | o the next step and yo | u will be unable to r                    | eturn to this step |   |   |
| Clicking "Go to next st  | ep" will move this review to | o the next step and yo | u will be unable to r                    | eturn to this step |   |   |
| Clicking "Go to next se  | er" will move this review to | o the next step and yo | u will be unable to r<br>Go to next step | eturn to this step |   |   |
| Clicking "Go to next standard and the standard stand<br>Standard standard stand<br>Standard standard stan<br>Standard | "will move this review to    | o the next step and yo | u will be unable to r<br>Go to next step | eturn to this step |   |   |



### **Frequent "Check Ins"**

The supervisor should meet with the employee monthly or bi-monthly to provide regular feedback on performance as measured against goals and to address any performance issues.

Meetings should be documented and documentation saved for ease of access in preparing the formal review at the end of the review period. (Refer to 1-on-1 available documents.)

The review will self-advance to the "Employee Self-Evaluation" step at the end of the "Evaluating" period.











1. Log in to PageUp Performance Management and click on "About me" and then "Performance reviews" or by clicking on the appropriate review.

|   | *   | About me ~                 |               |
|---|-----|----------------------------|---------------|
|   | Nel | Journal                    | are logged in |
|   |     | Development plan           |               |
|   | ø   | Performance reviews        |               |
| * | 201 | 19 - 2020 Annual Review    |               |
|   | Cur | rrent step: Employee Self- | Evaluation    |
|   | -   | -0-0-0-0-                  | -00           |



You may also log in to PageUp Performance and click on "About me" and then "My performance reviews. Then, select one of the two options to open the review.



Click "View the review process" to view complete and incomplete steps with due dates.







Comments you enter for your Objectives and Competencies, along with any Attachments and Significant Accomplishments, create your Self-Evaluation. Click Next to begin your Self-Evaluation.



#### Instructions for Employee Self-Evaluation:

Adding Comments to Objectives or Competencies, along with any attachments, IS your Self-Evaluation -To add a Comment, click on the Add comment box to open the comment box and add text, or click on the Add comment dropdown menu to link a Journal or 1-on-1 entry.

Adding Significant Accomplishments - To add a Significant Accomplishment, click on +Add Accomplishments (Employee ONLY), enter a Title, and enter relevant content for the accomplishment.

Adding Attachments - to add an Attachment, click on +Add Attachments and upload the relevant attachment.

Note: The employee SHOULD NOT click on the +Add Objective (Supervisor Only) box as this action is reserved for a supervisor.

Once The Employee Has Completed the Self-Evaluation:

The review will move to Supervisor Evaluation of Employee.



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| Employee Signif | ficant Accomplishments Saved Last saved: 3 Nov 2022, 10:52am Action  |
|-----------------|--|
| The Employee    | e May Add Significant Accomplishments Until The Review Is Submitted To The Supervisor For Supervisor Evaluation Of Employee.   |
| Employees are   | e encouraged to add significant accomplishments that were <b>NOT</b> part of the current year objectives.  |
| Employee:       | Enter an Accomplishment by clicking on <b>+Add Accomplishments (Employee ONLY)</b> box in the bottom left of the Significant Accomplishments section o the review.   |
| Supervisor:     | There is no action for a supervisor in this step. Once the employee completes the <b>Employee Self-Evaluation</b> , the supervisor will review any <b>Significant</b><br><b>Accomplishments</b> and add a <b>Comment</b> (if desired) during the <b>Supervisor Evaluation of Employee</b> step. The supervisor should <b>NOT</b> add any additional accomplishments. |
| • Add Accompli  | lishments (Employee ONLY)  |
| <b>←</b> Back   | Nex  |
| 1.              | . Click "Add Accomplishments   |
| (E              | imployee ONLY)" to add an  |

part of your current year

#### objectives.







| ttachments                                      | Saved Last saved: 3 Nov 2022, 10:52am  | Actions 🔻 |
|---|--|-----------|
| An employee or                                  | r supervisor may add an <b>Attachment</b> (s) that supports reaching an <b>Objective</b> , a <b>Competency</b> , or a <b>Significant Accomplishment</b> .  |           |
| Employee:                                       | Click on <b>+Add Attachments</b> if you would like to add an attachment. Attachments are not mandatory. Attachments may be added until the review i submitted to the supervisor for <b>Supervisor Evaluation of Employee</b> . | S         |
| Supervisor:                                     | Click on <b>+Add Attachments</b> if you would like to add an attachment. Attachments are not mandatory. The supervisor should review all attachments the <b>Supervisor Evaluation of Employee</b> step.                        | during    |
|   |  |           |
| <ul> <li>Add Attachmer</li> <li>Back</li> </ul> | nts  | Next 🗲    |
|   |  |           |
|   |  |           |

1. Click on "Add attachments" to add an attachment. Attachments should not be more than 10 pages. Examples include training completion certificates, letters of appreciation, license certification, etc. The process may be repeated for multiple attachments.



| Attachments    |   |   |   | Saveu Last sav  | ed: 3 NOV 2022, 10:52am | Actions 🔻 |
|----------------|---|---|---|---|-------------------------|-----------|
| An employee o  | r supervisor may add an <b>Atta</b>                             | <b>chment</b> (s) that supports re  | eaching an <b>Objective</b> , a <b>Competency</b> ,   | or a Significant Accomplishment   |                         |           |
| Employee:      | Click on <b>+Add Attachme</b><br>submitted to the supervi       | <b>nts</b> if you would like to add<br>sor for <b>Supervisor Evalua</b> t     | d an attachment. Attachments are not<br>t <b>ion of Employee</b> .  | mandatory. Attachments may be ac  | ded until the review    | is        |
| Supervisor:    | Click on <b>+Add Attachme</b><br>the <b>Supervisor Evaluati</b> | <b>nts</b> if you would like to add<br>on of Employee step.                   | l an attachment. Attachments are not i  | mandatory. The supervisor should i  | eview all attachment    | s during  |
|                |   |   |   |   |                         |           |
| ltem title     |   |   |   |   |                         |           |
|                | Title*  | Please enter Attachmen  | ts title here   |   |                         |           |
|                | Attachment  | ▲ Upload document   |   |   |                         |           |
| ● Add Attachme | 2. Enter an<br>Upload do<br>adding all<br>save the at           | attachment title<br>cument box to up<br>the individual "+/<br>tachments and m | and the description conte<br>load the attachment. Wh<br>Add Attachments," click "<br>love to the next section o | ent in this box. Click on<br>en you have completed<br>Next" on the bottom ri<br>f the review. | the<br>I<br>ght to      | Next 🗲    |



Continue clicking on the "Next" button in the bottom of the pages until you reach the page shown in the image below.



## UNIVERSITY of Supervisor Evaluation of Employee



## UNIVERSITY of <u>West</u> Florida

### **Supervisor Evaluation of Employee**

You (as supervisor) may access the employee's evaluation by clicking on "My team" and then "Performance reviews" or by clicking "Annual Review" for the particular employee.



## **WEST FLORIDA** Supervisor Evaluation of Employee



After tracking the employee's performance throughout the year, it is now time for the supervisor to prepare a formal, written evaluation of the employee. **Supervisors, after** reading the performance ratings below, click on Next until you reach the ratings page where you will select the number of stars which correlate with your rating. Please note that a supervisor is required to enter comments for ratings above or below "3 Stars."

Core Competencies are those competencies by which everyone in the organization is measured. These Core Competencies allow supervisors to drive organizational goals, enforce cultural and behavioral attitudes, and set the organization on the same path toward success. The following ratings should be used to evaluate employees. 1.0 - Below Performance Standard– Employee is not meeting standards, goals, or objectives set for the position. The employee must show significant improvement toward satisfactory completion of performance standards or may be removed from the University in accordance with UWF policy. Employee does not demonstrate the knowledge or ability needed to perform assigned duties, and consistent supervision is required. Supervisor must contact the Human Resources Director before completing an evaluation with

2.0 - Needs Improvement Performance Standard – Employee does not satisfactorily complete assigned duties and needs to make improvement toward meeting performance standards. Employee requires more supervision than the average employee, and continued improvement in performance is required. Supervisor must contact the Human Resources Director before completing an evaluation with this overall rating.

3.0 - Satisfactory Performance Standard – Employee meets all position requirements, standards, and expectations for the position. Employee's work is timely and efficient. Employee requires an average level of supervision.

4.0 - Above Performance Standard – Employee consistently exceeds expectations and demonstrates ability to surpass position requirements. Performance is timely and embodies a high degree of accuracy and independence. Employee shows initiative and innovation in performance of duties and responsibilities and requires minimal supervision.

5.0 - Superior Performance Standard – Employee significantly exceeds position requirements, goals and /or objectives set for the position and is well above expectations in terms of completeness, timeliness, and independence. Employee contributes to university goals and objectives beyond position requirements. The employee requires little supervision and is an exemplary employee with a strong potential for advancement.

Read and follow the provided instructions. Click "Next" at the bottom of the page to continue.

this overall rating.



#### Instructions for Supervisor Evaluation of Employee:

The supervisor will review employee Comments, Significant Accomplishments, and Attachments from the employee's self-evaluation. The supervisor should add comments directly relating to the employee's objectives and competencies. The supervisor **MUST** add comments to competency ratings above or below "3 Stars."

Note: The supervisor **SHOULD NOT** add any additional objectives to the review once the review has moved beyond the **Evaluating Period** step.

Note: The 1-up supervisor should only complete the review if the direct supervisor CAN NOT complete the review.

Once The Supervisor Has Completed the Supervisor Evaluation of Employee:

The review will move to the Employee Acknowledges Evaluation step.

\_\_\_\_\_

This page provides additional instructions for supervisors.





## **WEST FLORIDA** Supervisor Evaluation of Employee





|  | the review.  |   |  |
|--|--|---|--|
| Supervisor:                                    | There is no action for a supervisor<br>Accomplishments and add a Con<br>accomplishments. | in this step. Once the employee completes the <b>Employee Self-Evaluation</b> , the supervisor will rev<br>Inment (if desired) during the <b>Supervisor Evaluation of Employee</b> step. The supervisor should <b>N</b> | riew any <b>Significant</b><br>OT add any additional |
| <ul> <li>Add Accompli</li> <li>Back</li> </ul> | ishments (Employee ONLY)   |   | Next >   |
|  | 1  |   | 1  |
| view any Sig<br>complishme                     | gnificant<br>ents (if applicable)  | Please do not add any additional accomplishments.   | Click "Next" to<br>proceed to the<br>following page  |
| ded by your<br>mments if d                     | r employee and add<br>lesired.   | Accomplishment entries are reserved for the employee.   |  |



| iew any Attachr<br>ed during the se<br>luation process.<br>achments were e | nents<br>elf-<br>optional.                             | You (as supervisor) may add attachments during this step.   | Enter a Title and click<br>on Upload document<br>add the attachment.<br>Remember to limit the<br>attachment to 10 page | k<br>t to<br>he              | Click "Next" to<br>proceed to the<br>following page |
|--|--|---|--|------------------------------|---|
| ● Add Attachments<br>← Back  |  |   | Attachment  Add Attachments  Back  | Upload document              | Next >  |
| Supervisor: C<br>t   | Elick on <b>+Add Attac</b><br>he <b>Supervisor Eva</b> | <b>chments</b> if you would like to add an attachment. Att<br>luation of Employee step.                               | Title  | Please enter Attachments tit | le here   |
| Employee: 0  | Click on <b>+Add Atta</b><br>submitted to the su       | <b>chments</b> if you would like to add an attachment. Att<br>pervisor for <b>Supervisor Evaluation of Employee</b> . | achments are not mandatory. Attao  | chments mav be added         | until the review is                                 |
| An employee or sup   | ervisor may add ar                                     | Attachment(s) that supports reaching an Objectiv  | <b>re</b> , a <b>Competency</b> , or a <b>Significant</b>  | Accomplishment.              |   |
| Attachments  |  |   |  | ✓ Saved Last saved: 4        | Nov 2022, 4:43pm Actions ▼                          |

| About me 🗸 My team 🗸 Reports   | ● Journal entry | Test 1 ~ |
|--|-----------------|----------|
| Test 2 Performance - 2019 - 2020 Annual Review   |                 |          |
| Start Current Year Objectives Employee Significant Accomplishments Attachments Supervisor Evaluation of Employee   | Next steps      |          |
| Supervisor Evaluation of Employee Saved  |                 | Actions  |
| Employee, please click "Next Steps"<br>INSTRUCTIONS FOR SUPERVISORS ONLY.<br>1. Please provide a rating for your employee for each competency below by clicking on a star. |                 |          |
| 2. Comments need to be added by clicking on the "add comment" button.     Summary: Supervisor Evaluation of Employee   |                 |          |
| Test 1 Performance   |                 |          |
|  |                 |          |
| ~ Knowledge, Skills, and Abilities   |                 |          |
| Employee has the knowledge, skills, and abilities needed in the present position Test 1 Perform Not rated  | ance<br>[       |          |
| Above Performan<br>Standards<br>4  | ıce             | e        |
| Save & Share Save as Private Cancel  |                 |          |

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Supervisor should hover over the stars for each competency to rate the employee. The øverall rating will calculate under "Summary." The supervisor may leave comments for each competency; comments are required for any rating above or below a "3." Once all competencies have been rated, the supervisor should click "Next" at the bottom on the page to continue to the next step in the process.

Supervisor may review overall rating and a summary of the employees evaluation.

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After the supervisor clicks on "Go to next step," the Supervisor Evaluation of the Employee is complete.



After the supervisor has completed the supervisor evaluation the of employee, the supervisor will need to conduct an evaluation review meeting with the employee to discuss the evaluation and rating (this step will not be completed in the PageUp system).







- The employee will log into PageUp Performance Management to review and acknowledge the evaluation.
- After the employee has reviewed the evaluation, they have the option to leave a comment and/or "Acknowledge." Once the employee clicks on "Acknowledge," the evaluation will go to a status of complete. This step will notify Human Resources that the employee has had an opportunity to review the evaluation. If the employee disagrees with the evaluation, they should request a meeting with their supervisor to discuss their concerns before they "Acknowledge."
- Please see the step by step instructions on the following pages.





After the employee logs into PageUp Performance Management, they may access their evaluation by clicking "About me" and then "Performance reviews" or by clicking "Annual Review."







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| About me 🗸  | Journal entry | Test 2 ~ 🧃 |
|---|---------------|------------|
| Test 2 Performance - 2019 - 2020 Annual Review  |               |            |
| Start       Current Year Objectives       Employee Significant Accomplishments       Attachments       Supervisor Evaluation of Employee         Start       Current Year Objectives       Employee Significant Accomplishments       Attachments       Supervisor Evaluation of Employee | Next steps    |            |
| Attachments Saved   |               | Actions -  |
| OPTIONAL: Employee may click on "Add Attachments" to add attachments under the "Attachment" tab.  |               |            |
| Attachment Review any supervisor attachments the  | n click       |            |
| "Next" to proceed to the next step in th  | e proce       | ss.        |
|   |               |            |
|   |               |            |
| ← Back  |               | Next 🗲     |

On the following page(s) review the rating for each competency and any supervisor comments. Then click "Next" at the bottom of each page to proceed to the next step in the process.

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Review the star rating the supervisor entered for each competency. The overall rating will calculate under the Summary. The supervisor was required to enter comments for any rating above or below 3 stars. If they did not, please speak with them or contact the Employee Relations Coordinator in Human Resources to assist.

| Test 1 Performance  |                                     |  |
|---|-------------------------------------|--|
| Above Performance<br>Standards  |                                     |  |
| Knowledge, Skills, and Abilities<br>Employee has the knowledge, skills, and abilities needed in the present position. | Test 1 Performance                  |  |
|   | Notrated                            |  |
|   | Above Performance<br>Standards<br>4 |  |
|   |                                     |  |

Review the overall rating and any supervisor comments. Then enter any comments you as the employee would like to note. Once done, click "Acknowledge" to complete this step. If you disagree with the content of the performance evaluation, request a meeting with your supervisor to discuss prior to clicking on the "Acknowledge" button. You may also reach out to the **Employee Relations** Coordinator for assistance.

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| st 2 Performance - 2019 - 2020 Annual Review (Non-Supervisor)   | 5   |
|---|---|
| Start 👌 Current Veor Objectives 🍦 Employee Significant Accompils  | mments $ angle$ Attachments $ angle$ Supervisor Evaluation of Employee $ angle$ .   |
|   |   |
|   | Saved Letit saved: 16 jun 2020, 4:14pm Actions  |
| By dicking the "acknowledge" button, you acknowledge receipt of yo<br>"acknowledge" button, your performance evaluation will be submitt<br>performance evaluation, you should schedule a meeting with your<br>have met with your supervisor, you will need to click the "acknowled<br>Resources for final review.   | our performance evaluation. Once you have clicked the<br>ted to Human Resources for final review. If you disagree with your<br>supervisor prior to clicking on the "adcrowledge" button. Once you<br>dge" button to move your performance evaluation to Human   |
| Overall rating<br>4.875.0<br>Superior Performance   |   |
|   |   |
| Beling summary  | 1<br>Test 1 Performance   |
| - Current Year Objectives   |   |
| 1. Employee objective<br>2. Objective   |   |
| Employee Significant Accomplishments  |   |
| Attachementa  |   |
| Supervisor Evaluation of Employee   |   |
| Field comments<br>Test 2 Performance  |   |
| Tes l'armands<br>Tes 2 performance<br>III D C C C L = = = =   III =   III = Source<br>III D C C C L = = = =   III =   III = Source<br>III D C C C C C C C C C C C C C C C C C   |   |
| Facilitarianeds<br>Tex 2 Performance<br>■ AIIC II = = = = = = = = = = = = = = = = =   | -0  |
| Professionandes<br>Text 2 Performance<br>Text 2 Performance<br>Supervisor controlets.<br>Your next slop. HR Proteoms & HR Aggroves<br>Approval<br>Hyou disagne with the review, then leave comments in the "Brial   | Community Par.  |
| Test i 2 performants Test 2 performants Test 1 performatts Test 1 performants Test 1 per | Commission Bas.   |
| Text I 2 Performance<br>U   C II   II = II = III = IIII = IIIII = IIIIII   | Constructs Boc.   |
| Test 1 Performance Test 1 Performance Supervisor to discuss provide the review. Test 2 discuss of the Acknowledge button, you are extrawed and the review.  | commission and some semilation. Once you have adon with sever the sources for their noce you have adon with sever the sources for their receiver and some adont with sever the sources for the severe some sources adont the severe sources adont the |



### For more information call us!



For more information contact Lynne Randall, Employee Relations Coordinator at 850-474-2292 <u>Irandall1@uwf.edu</u> or Jamie Sprague, Asso. V.P. Human Resources at 850-474-2156 <u>jsprague@uwf.edu</u>.