

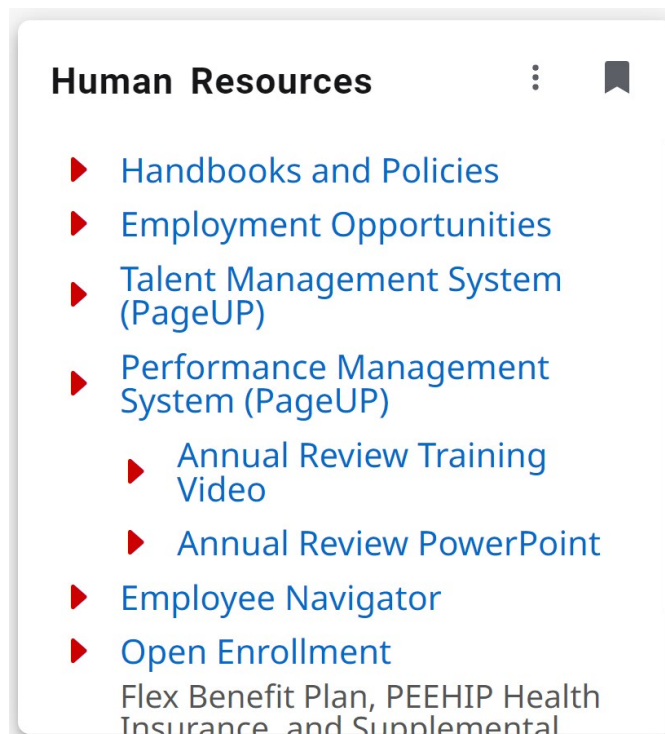


PageUP: Completing a Staff Performance Evaluation (Supervisor's Guide)

1. Login to your My Jax State account.

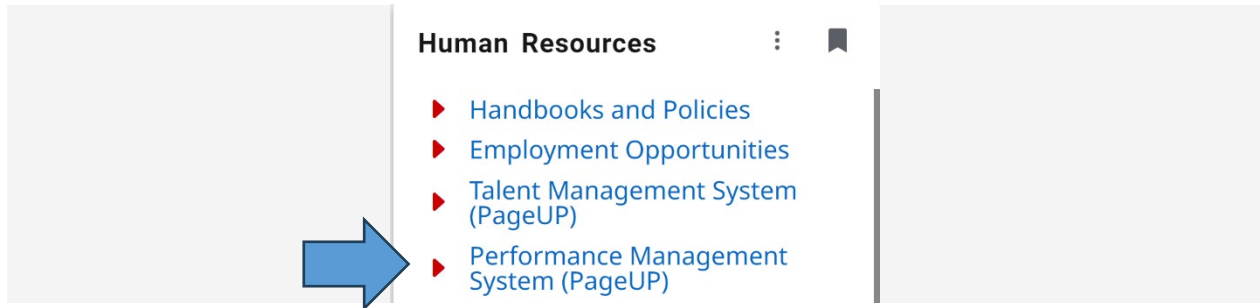


2. Select the Human Resources card.
 - You may have to search in Discover More for the card.
 - You can bookmark it for later use.

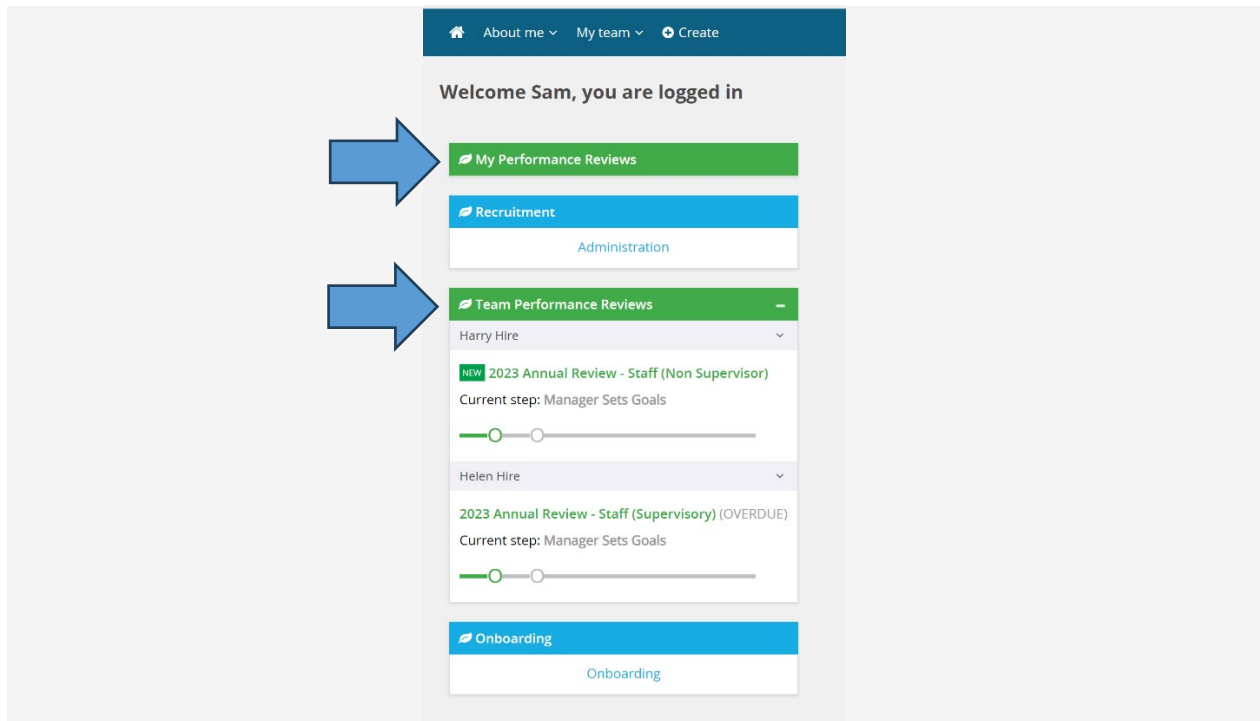




3. Select Performance Management System (PageUP)

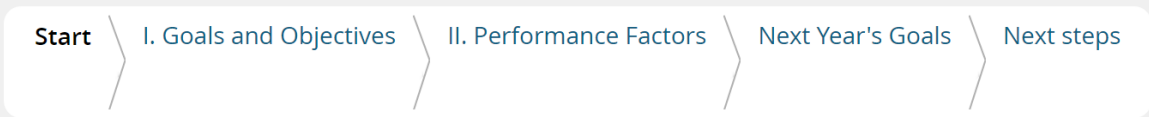


4. From your Performance Dashboard, you will see any reviews for yourself under “My Performance Reviews” and any employees you supervise in the “Team Performance Reviews” section.



5. Find your employee on the list.
6. Select the review you want to begin.
7. The review will open, and you will be on the first step in the process. The “Start” page outlines the review steps. You can also use the tabs at the top of the page to skip to different pages, depending on your current step.

Harry Hire - 2023 Annual Review - Staff (Non Supervisor)






8. To begin setting your employee's goals for the upcoming review year/cycle, either select "Next" in the bottom right corner or click on the **Goals and Objectives** tab at the top of the page.

Harry Hire - 2023 Annual Review - Staff (Non Supervisor)

Start > I. Goals and Objectives > II. Performance Factors > Next Year's Goals > Next steps



Manager Sets Goals (Step 1/9)

Dear Sam,

Jax State is launching the Staff Employee Performance Review process for 2023. This year's review will contain the following steps:

1. Manager Sets Annual Goals
2. Employee Reviews and Acknowledges Annual Goals
3. Review Period
4. Employee Self Evaluation
5. Supervisor Completes Evaluation
6. Manager/Employee Review Discussion
7. Next Year's Goals Discussion
8. Employee Acknowledgement
9. Complete Review

All reviews will need to be completed on or before 20 Nov 2024, but please remember that the evaluation period runs from January to December each year.

Please click **Next** at the bottom of the page to move forward.

Employee: Harry Hire	Manager: Sam Performance
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9. The supervisor/manager is responsible for completing the following steps.
 - a. Manager Sets Annual Goals
 - b. Review Period (shared by supervisor and employee)
 - c. Supervisor Completes Evaluation
 - d. Manager/Employee Review Discussion
 - e. Next Year's Goals Discussion
10. Once you read through the instructions on the **Goals and Objectives** page, begin by clicking on the "Add Goals and Objectives" button to open up the text entry box.



Harry Hire - 2023 Annual Review - Staff (Non Supervisor)

Start > I. Goals and Objectives > II. Performance Factors > Next Year's Goals > Next steps

I. Goals and Objectives

✓ Saved Actions ▾

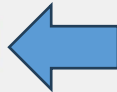


Supervisor Instructions : Please enter the goals that your direct-report was tasked with completing this year.

- Please enter the name of the goal in the **Title** Box.
- Please enter your expectations in the **Measure** Box.
- Please add a minimum of Three (3) goals.
- You will be able to comment on the employee's completion of these goals in the next step.

Employee Instruction- Please review the goals that have been entered by your supervisor

+ Add Goals and Objectives



← Back

Next →

11. You will enter a title for goal in the “Title” box, then list or outline the specific details or measures your employee will be responsible for achieving within the next review year. Your entries will auto-save as you work.
You have the option to format the text in multiple ways using the toolbar.

Item title



Title* Increase Enrollment By 10%

Measure

B I U | Source

Key Strategies:

1. Targeted Marketing Campaigns:

- Develop and implement a digital marketing strategy aimed at prospective students.
- Utilize social media platforms, email newsletters, and online ads to reach diverse audiences.

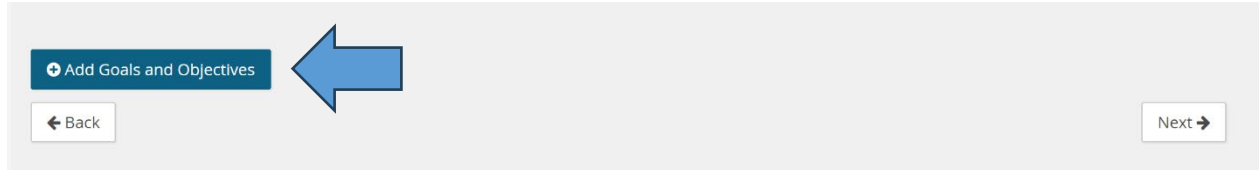
2. Enhanced Recruitment Efforts:

+ Add Goals and Objectives

← Back

Next →

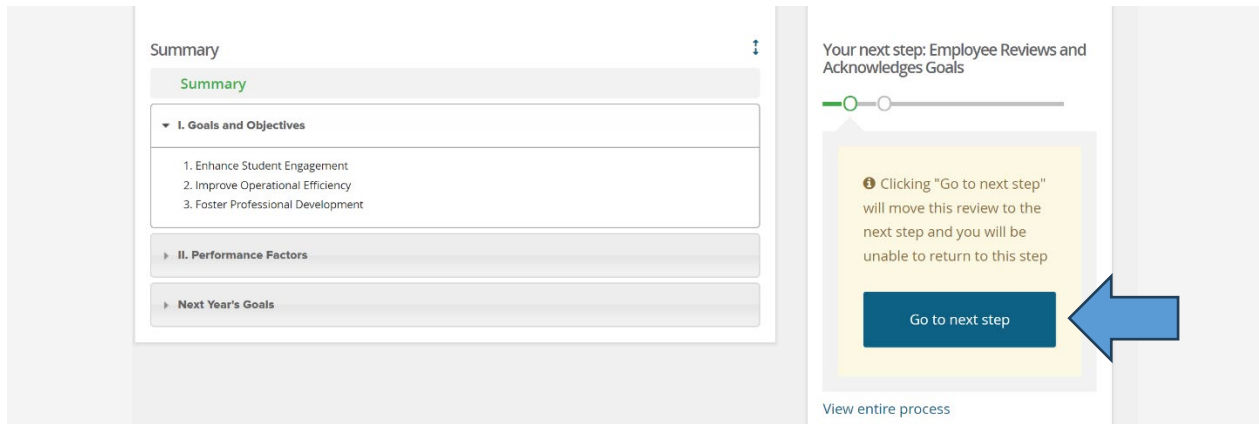
12. To add additional goals, simply repeat the process by clicking on the “Add Goals and Objectives” button again.



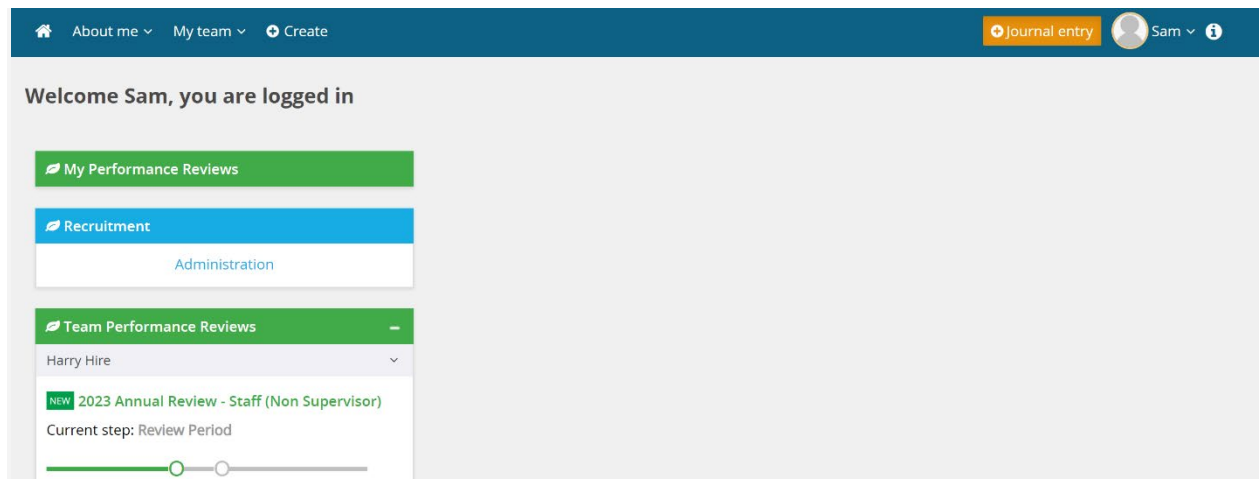
13. Once you are satisfied with the goals, you can click “Next” to advance through the review or use the tab at the top to go to the **Next Steps** page.

14. From this page, you can review your step summary. If any items still need to be completed, you will see a message at the top of the screen.

15. The box on the right shows you the next step in the process (Employee Reviews and Acknowledges Goals) and instructs you to click the “Go to next step” button.



16. Once you have advanced the review to the next step, your employee will receive an email notification making them aware of the step completion. They will have a specific amount of time, which varies depending on the review, to review and acknowledge the goals before it advances to the next step (Review Period).





17. The “Review Period” step is the longest step in the review process. During this step, there aren’t any actionable items for the supervisor or employee, but both have the opportunity to add notes to assist with the next steps of the review process.



18. Utilizing the “Journal Entry” feature, both the supervisor and the employee can add notes regarding their progress through the review period (see below). There are three ways to add these entries:

- Using the PageUp link in MyJaxState
- Using the PageUP mobile application
- Using the mail matcher email address to email the information to the review (see below).

** Journal entries made by either the supervisor or the employee will not be visible to the other party unless they are entered as comments in a section of the review itself.

✉ **My journal mail matcher**

Use your mail matcher address to send journal entries via email. Ensure you have added the [journal] tag in your email: **My journal** <employeeep3rformance.phr.lyvmrv.HWRPR@m.dc4.pageuppeople.com>

19. The “Review Period” will advance on its own once the designated time period has expired. The employee will be notified to begin their self-evaluation at that time.

20. Once the employee has completed the self-evaluation, you will be notified to begin their performance review.

21. Read through the instructions. The step’s due date will be listed there as well.

22. Once you’re ready to begin, click “Next” or the **Goals and Objectives** tab.



Supervisor Completes Evaluation (Step 5/9)

Dear Sam,

Harry Hire has completed their self-evaluation and you are able to view their comments and ratings prior to submitting your ratings and comments for their goals and performance factors.

Please take the time to provide a realistic assessment of your employee and provide feedback, including specific examples, to support your ratings. Comments are required for all ratings, along with a summary of the employee's review.

For assistance with performance evaluations, please review the following document on the Human Resources website: [Supervisor's Guide: Staff Performance Evaluations](#).

If you are submitting a review that has an overall score that is less than "Meets Expectations" (below 3.0) please contact Human Resources.

This step is due 01 Nov 2024.

You will be able to add comments to their goals and rate/add comments to their Performance Factors.

Please click on **NEXT** to continue.

Employee: Harry Hire

Manager: Sam Performance

23. Review the goals and any comments your employee entered.

▼ Enhance Student Engagement

Objective: Increase student engagement in campus activities by 20% over the academic year.

Key Strategies:

- Develop and Implement a marketing plan to promote events and programs.
- Collaborate with student organizations to co-host events.
- Gather feedback from students to continuously improve offerings.

Expected Outcome: A measurable increase in student participation, fostering a more vibrant campus community.

Add comment ▼

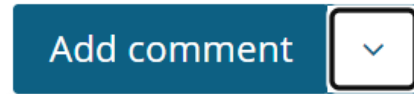
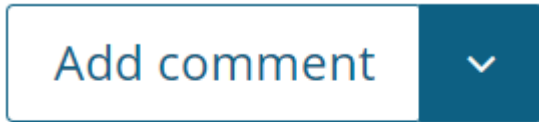
Comment Harry Hire

I did not achieve the full 20%, but did achieve a 15% increase in student engagement. I did create and implement a marketing plan and gathered valuable information by collaborating with student organizations.

Last Monday at 9:44 AM

24. To add a comment, you have multiple options. The button has a left and right side, each allowing different actions.

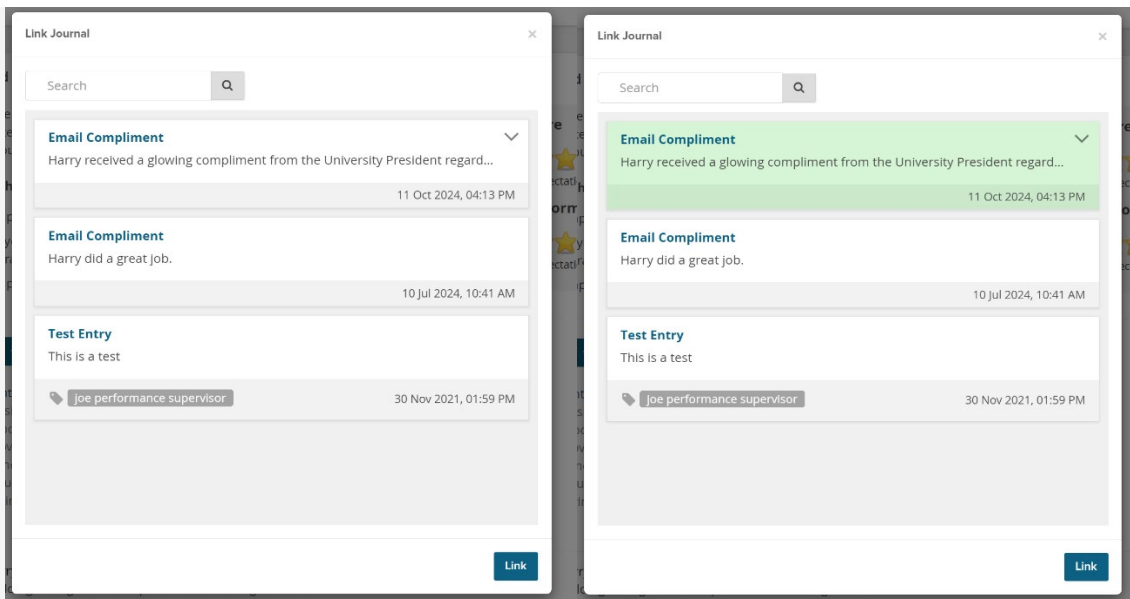
- a. The left side "Add comment" will open up a text box for you to comment on your goal.
- b. The right side (down arrow) will give you an option to link a journal entry or upload a file.



Link journal entry

Upload file

25. To link a journal entry,
- Select the option from the list.
 - Locate the journal entry you'd like to link.
 - Highlight (by clicking on) the entry.
 - Click "Link"



26. You will see the linked journal entry appear under the goal.
27. To add comments, click on the "Add Comment" side of the button and a text box will appear. You will have two options once you have completed typing.
- Save & Share – Saves the comment, making it visible.
 - Save as Draft – Saves the comment as a draft making it visible only to you.

Harry did increase student engagement by 15% while creating and implementing a marketing plan. Harry also collaborated with various student organizations to improve engagement. I would like to see Harry continue these initiatives in the upcoming year to gain that extra 5%.

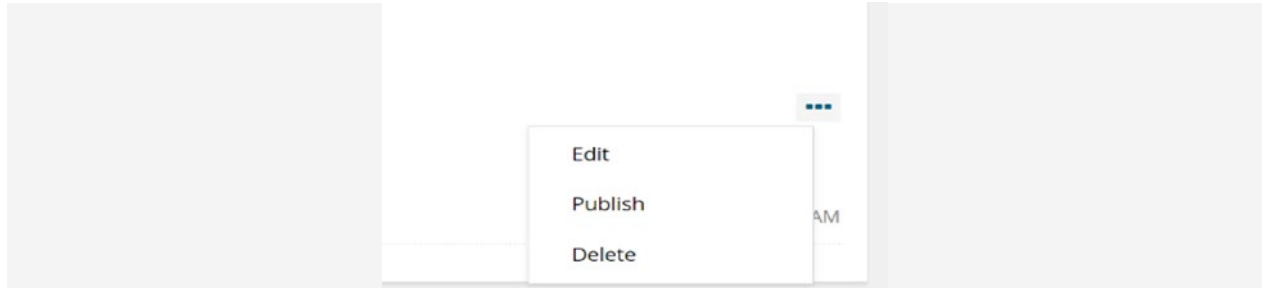
Save & Share Save as Draft Cancel

Comment Harry Hire
I did not achieve the full 20%, but did achieve a 15% increase in student engagement. I did create and implement a marketing plan and gathered valuable information by collaborating with student organizations.

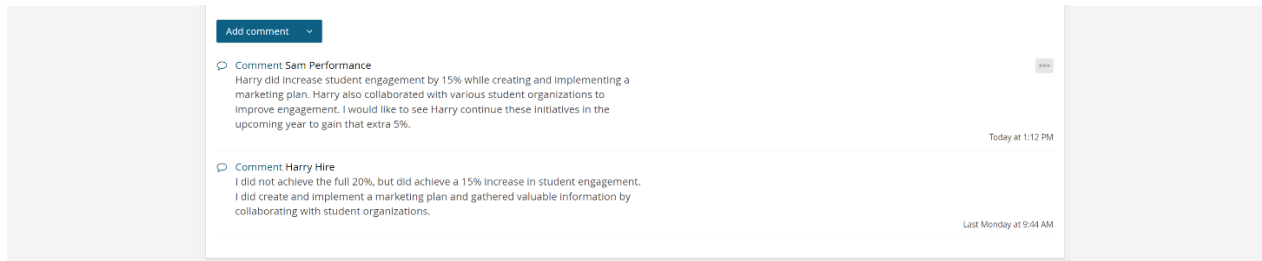
Last Monday at 9:44 AM



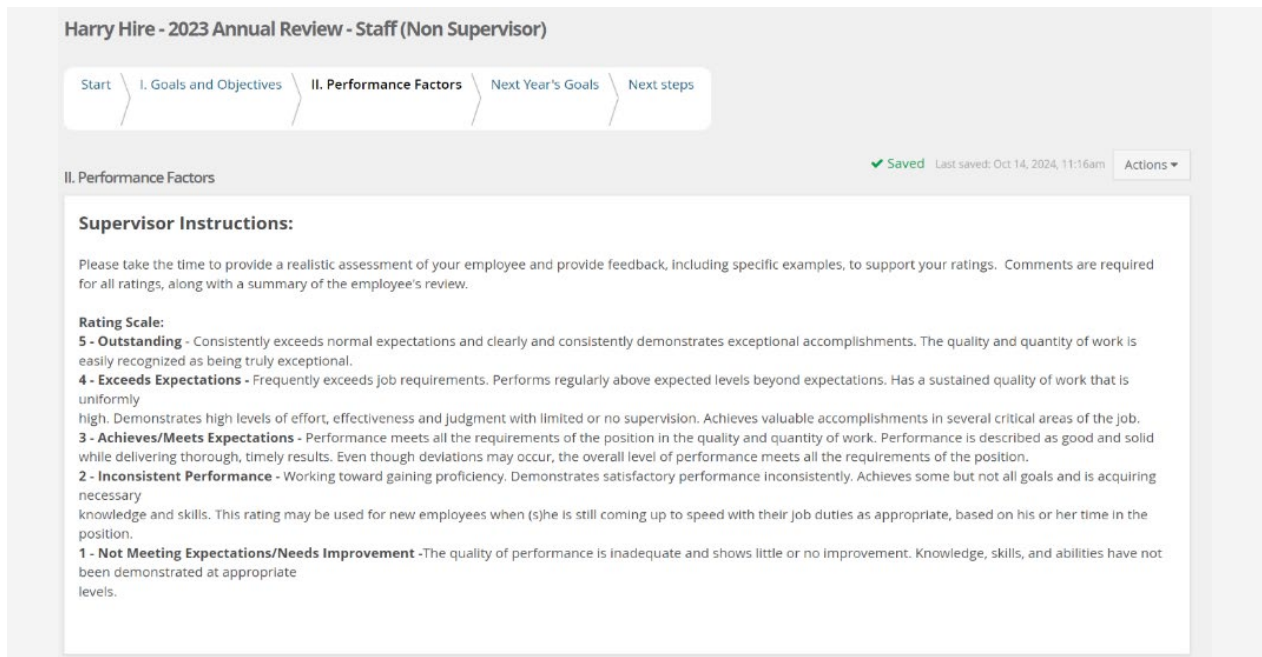
28. If you save as a draft, you have the option (on the right) to edit, publish or delete the comment.



29. Once you publish the comment, you have the option to edit or delete the comment before finalizing the review.



30. Move to the **Performance Factors** tab once you complete your goal comments.
31. You will see the rubric or Rating Scale (1-5) that you will use to rate your employee.





- 32. Read through each **Performance Factors** and rate your employee based on the rubric above. Provide a realistic assessment of their progress on each performance area.
- 33. You will be able to see the employee's self-evaluation ratings and comments for each factor while you are completing this step.

1. Job Knowledge, Skills and Abilities

This includes skills, the ability to apply those skills, the quality of the work performed.
In evaluating the employee, ask yourself:

- How informed is the employee about his/her job and related jobs in the unit as well as current trends in the profession?
- Does the employee take responsibility to become and remain competent?
- Does the employee use his/her knowledge to make sound and reasonable decisions?
- Once the assignment is given, does the employee follow through to an acceptable level in a reasonable time frame?
- Does the employee require constant reminders to complete assignments?
- Is the employee's work consistent and error-free?

Harry Hire
★★★★★
Achieves/Meets Expectations

Sam Performance
★★★★★
Not rated

Add comment

Comment Harry Hire
I strive to submit accurate and timely work with each assigned project. I follow through and ensure that I give myself ample time to complete each task. I could improve in managing multiple tasks at once, because sometimes I get sidetracked, which causes me to rush to meet deadlines.

Last Monday at 10:20 AM

34. Click on the stars to rate your employee.

1. Job Knowledge, Skills and Abilities

This includes skills, the ability to apply those skills, the quality of the work performed.
In evaluating the employee, ask yourself:

- How informed is the employee about his/her job and related jobs in the unit as well as current trends in the profession?
- Does the employee take responsibility to become and remain competent?
- Does the employee use his/her knowledge to make sound and reasonable decisions?
- Once the assignment is given, does the employee follow through to an acceptable level in a reasonable time frame?
- Does the employee require constant reminders to complete assignments?
- Is the employee's work consistent and error-free?

Harry Hire
★★★★★
Achieves/Meets Expectations

Sam Performance
★★★★★
Achieves/Meets Expectations

35. Enter the comments the same way you did for the **Goals and Objectives** section. Any performance issues or corrective action (verbal, written warnings, etc.) must be notated during the employee's review in the applicable section or summary.

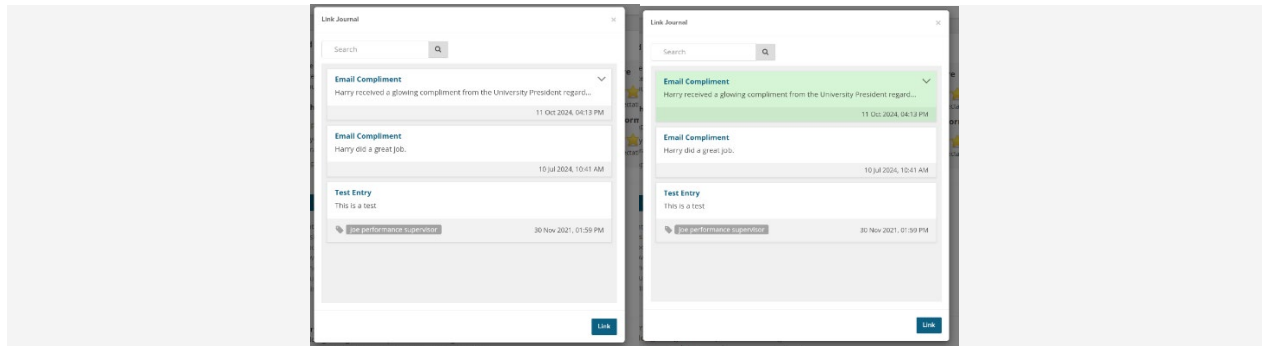
Harry takes responsibility and competently completes his work in a reasonable amount of time. Harry makes sound decisions and submits error-free work consistently.
I would like to see Harry take more initiative to complete tasks without being asked to do so.

Save & Share Save as Draft Cancel

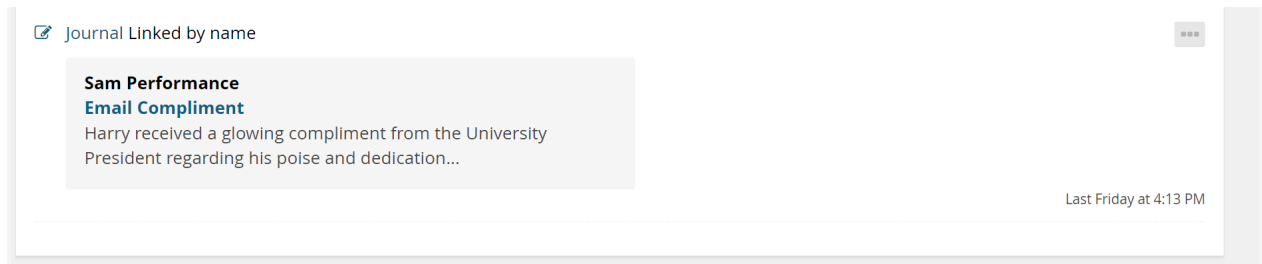
Comment Harry Hire
I strive to submit accurate and timely work with each assigned project. I follow through and ensure that I give myself ample time to complete each task. I could improve in managing multiple tasks at once, because sometimes I get sidetracked, which causes me to rush to meet deadlines.

Last Monday at 10:20 AM

36. If you need to link a journal entry, follow the same steps as above.

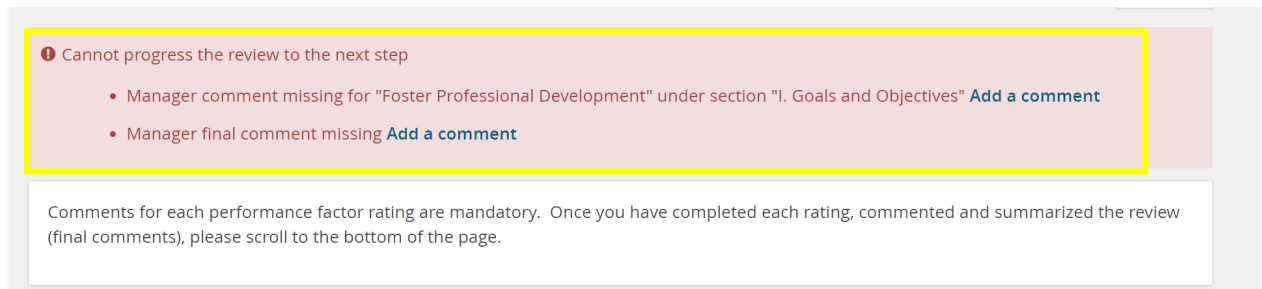


37. Any linked comments will appear under the comment section.



38. Once you have submitted ratings for all performance factors, and added comments on your employee's progress, please select "Next" or click on the "Next Steps" section.

39. Any incomplete actions will appear at the top of the screen.



40. You can review the overall score for your employee at the top of screen. If you need to adjust that score, simply go back to the **Performance Factors** section and adjust the stars on a particular factor. The score will update once it saves.

Overall rating: 3.0 / 5.0
Achieves/Meets Expectations

Rating summary

Rating summary | Sam Performance | Harry Hire

I. Goals and Objectives

- 1. Enhance Student Engagement
- 2. Improve Operational Efficiency
- 3. Foster Professional Development

II. Performance Factors

Next Year's Goals

Your next step: Manager/Employee Review Discussion

Cannot progress the review to the next step

View entire process

41. To complete this step in the review process, you must enter a summary of your employee's review in the Final Comments section.

Final comments

Harry Hire

I had a successful year in my position. I was able to increase engagement by 15% and attended several seminars to assist with my professional development. I look forward to what the upcoming year has to offer and hope we can continue to build upon our success.

Sam Performance

B I U | [Rich Text Editor Icons] | Source

Harry has consistently met performance expectations over the past year. He demonstrated solid competency in his role, delivering high-quality work that aligns with organizational standards. Harry effectively managed his workload and deadlines, contributing positively to team objectives. His collaborative spirit fostered a supportive team environment, and he maintained clear communication with colleagues and management. Additionally, he actively sought some professional development opportunities and applied feedback to enhance his skills.

Harry did have attendance issues this year and is on a PIP to correct those.

I would like to see Harry to improve his attendance and his initiative in the next review year.

← Back

42. Once you have the summary complete, the "Go to next step" will appear. Click on the button to send the review to the next step in the process, **Manager/Employee Review Discussion**.

Your next step: Manager/Employee Review Discussion

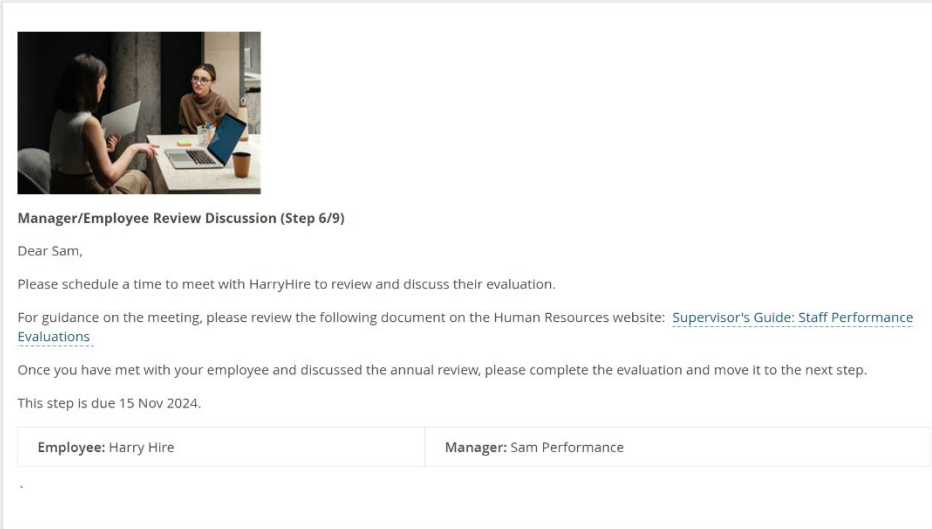
Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

View entire process



43. During this step you will not have any actionable steps in PageUp. You can schedule your time to meet with your employee to discuss the current review and discuss goals for the next review year.



Manager/Employee Review Discussion (Step 6/9)

Dear Sam,

Please schedule a time to meet with HarryHire to review and discuss their evaluation.

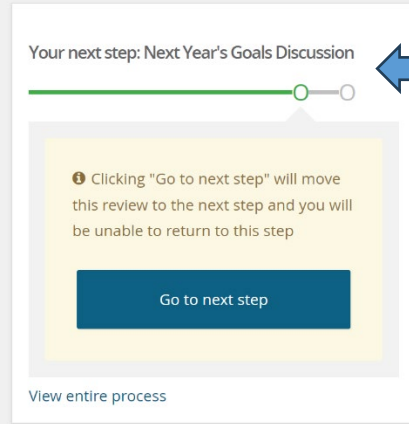
For guidance on the meeting, please review the following document on the Human Resources website: [Supervisor's Guide: Staff Performance Evaluations](#).

Once you have met with your employee and discussed the annual review, please complete the evaluation and move it to the next step.

This step is due 15 Nov 2024.

Employee: Harry Hire	Manager: Sam Performance
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44. You can advance the review to the **Next Year's Goals Discussion** step either before you meet with the employee or afterward. Click the button to advance the review.



Your next step: Next Year's Goals Discussion

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](#)

45. After you read the introduction, use the tab at the top to advance to the **Next Year's Goals** section.



Next Year's Goals Discussion (Step 7/9)

Please go to the **Next Year's Goals** tab to enter and review the goals for next year with your employee.

These can be imported into next year's evaluation once it is launched.

This step is due to be completed by 16 Nov 2024.

Once you have completed reviewing the items, go to the **last** tab and click on **Go To Next Step**.

Employee: Harry Hire

Manager: Sam Performance

46. If you have a previously completed goal, you have the option to import that here. If not, you can begin by entering the title for each goal.

Item title 🗑️

Title*

Goal Align

47. Once you enter the Title, you will “save,” which will provide the option to add comments (or measurables) for the goal.

Item title

Title*

Goal Align

48. Add a comment, just as you have previously throughout the review.

▼ Foster Professional Development ✎

There are no comments for this goal.



49. Once these goals are saved and the review is completed, they can be imported into the upcoming review cycle. Once you're done, go to the **Next Steps** tab.

Item title 🗑️

Title*

Goal Align Align this item to a corporate objective

50. On the Next Steps page, you will see your summary and will be notified of any incomplete actions.

Summary ↕

Summary

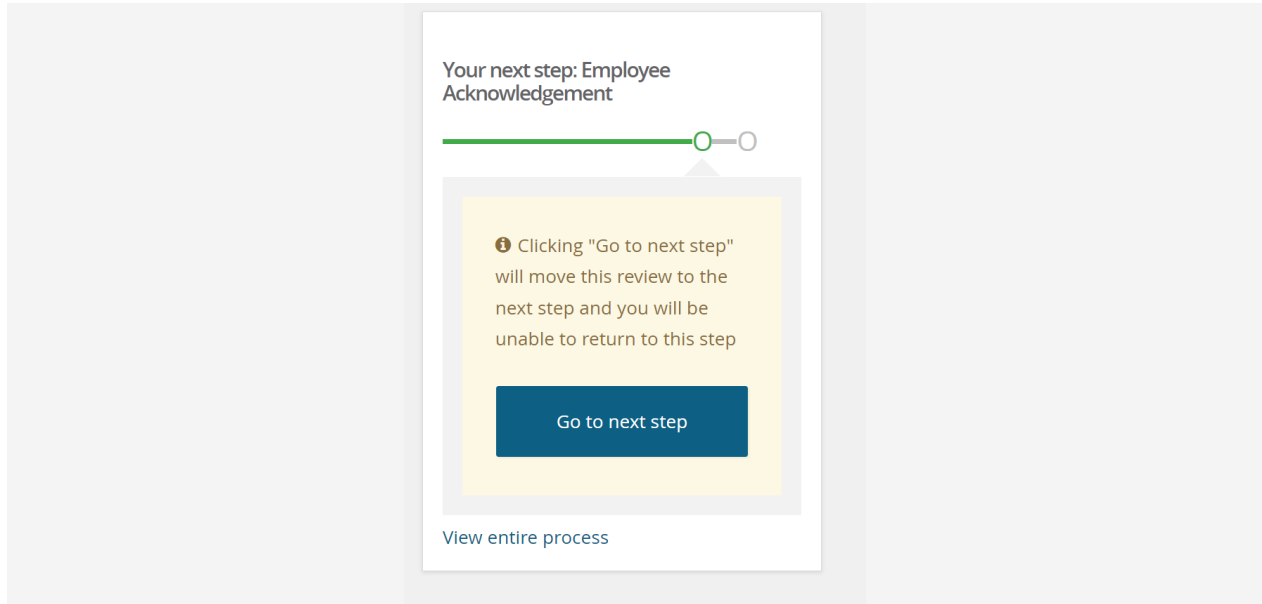
▶ I. Goals and Objectives

▶ II. Performance Factors

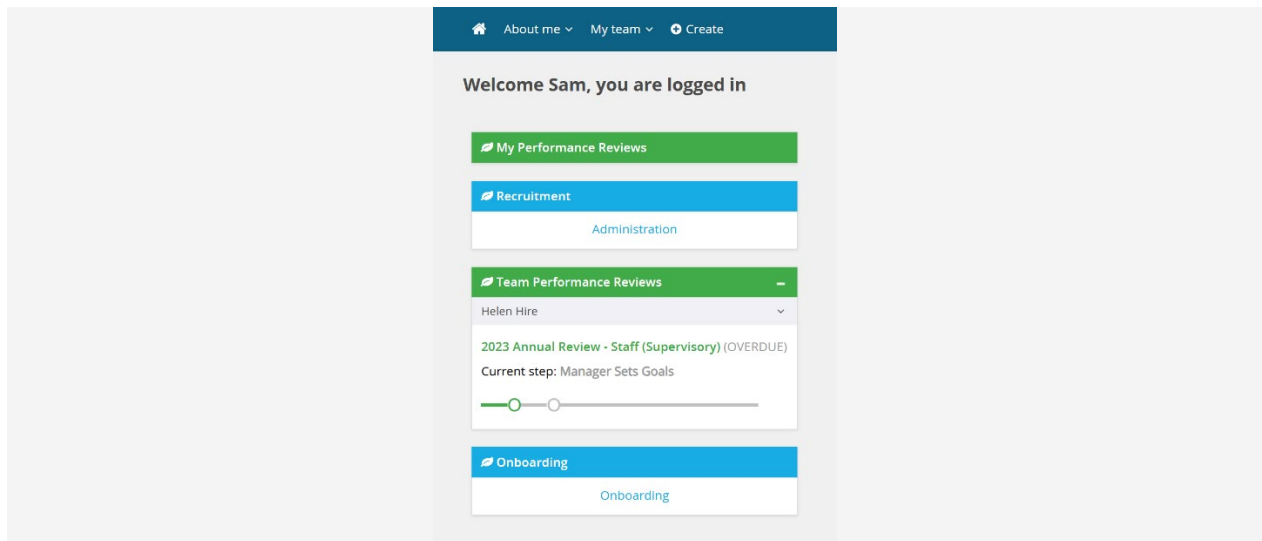
▼ Next Year's Goals

- 1. Foster Professional Development
- 2. Achieve 20% Student Engagement
- 3. Implement New Employee Training Program

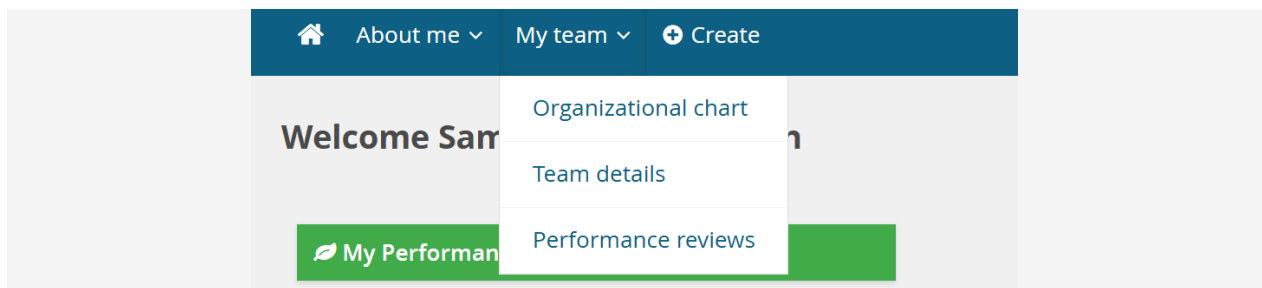
51. Once you have met with your employee and discussed both their review and their goals for the upcoming review year, please select "Go to Next Step." Your employee will have the opportunity to review the performance evaluation one last time. They can also add to their final comment prior to acknowledging receipt of the evaluation.



- 52. Once the evaluation is acknowledged, you can view your completed evaluation and any team members' evaluations on the dashboard.
- 53. Log back into the Performance Management System (PageUP) link through My Jax State.



- 54. From the dashboard, go to the "My team" dropdown. From there, select "Performance Reviews."





55. From the “My team performance reviews” page, you will see any team reviews in your queue to complete. You will also have multiple options to view performance reviews.

My team performance reviews

Employee first name: Employee last name:

Level: Status:

Review process step: Role:

Employee	Review process	Review step	Role	Start date	Due date		
Helen Hire	2023 Annual Review - Staff (Supervisory)	Manager Sets Goals		Jul 9, 2024	Aug 18, 2024	<input type="text" value="I want to..."/>	<input type="button" value="Open review"/>

Page 1 of 1 Jump to page Records 1 to 1 of 1

56. From the “Review process step” dropdown, you can select specific review steps to sort the reviews.

Review process step: Role:

- Select
- 2023 Annual Review - Staff (Non Supervisor)
 - Manager Sets Goals
 - Employee Reviews and Acknowledges Goals
 - Review Period
 - Employee Self Evaluation
 - Supervisor Completes Evaluation
 - Manager/Employee Review Discussion
 - Next Year's Goals Discussion
 - Employee Acknowledgement
 - Complete
- 2023 Annual Review - Staff (Supervisor)
 - Manager Sets Goals
 - Employee Reviews and Acknowledges Goals
 - Review Period
 - Employee Self Evaluation
 - Supervisor Completes Evaluation
 - Manager/Employee Review Discussion
 - Next Year's Goals Discussion
 - Employee Acknowledgement



57. To view your completed reviews, click on the “Status” dropdown box. You then have the option to change the view to “Complete” reviews. Selecting this will populate all of your team’s completed reviews.

My team performance reviews

Employee first name: Employee last name: Clear Search

Level: Status: Print Refresh

Review process step: Role:

Employee	Review process	Review step	Role	Start date	Due date	I want to...	Open review
Helen Hire	2023 Annual Review - Staff (Supervisory)	Manager Sets Goals		Jul 9, 2024	Aug 18, 2024	<input type="text" value="I want to..."/>	Open review

Page 1 of 1 Jump to page - Records 1 to 1 of 1

58. Locate the review you want to view or print.

Employee	Review process	Review step	Role	Start date	Due date	I want to...	View report
Harry Hire	2023 Annual Review - Staff (Non Supervisor)	Complete		Oct 11, 2024	Nov 20, 2024	<input type="text" value="I want to..."/>	View report

Page 1 of 1 Jump to page - Records 1 to 1 of 1

59. From the “I want to” dropdown box, select “View the report” to access a .PDF of the completed review.

Employee	Review process	Review step	Role	Start date	Due date	I want to...	View report
Harry Hire	2023 Annual Review - Staff (Non Supervisor)	Complete		Oct 11, 2024	Nov 20, 2024	<input type="text" value="I want to..."/>	View report

Page 1 of 1 Jump to page - Records 1 to 1 of 1

- View the report
- View progress report
- View the review process
- Create a follow on review
- View the development plan

60. Once the .PDF populates, you can print or save the review by clicking on the printer icon in the upper right of the page.

04 November 2024

Harry Hire - 2023 Annual Review - Staff (Non Supervisor)

Manager: Sam Performance

Step: Complete

3.0 / 5.0
Achieves/Meets Expectations

Your score Maximum

