



Staff Performance & Success Program User Guide

Updated: 5/20/2021

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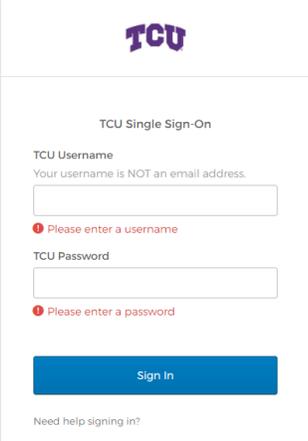
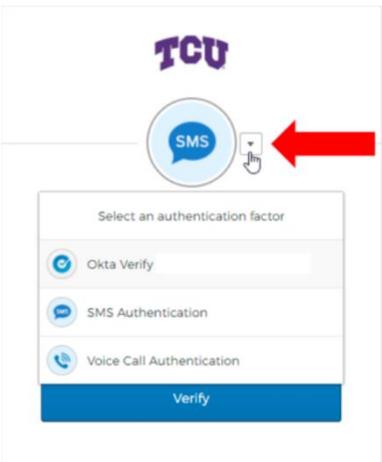


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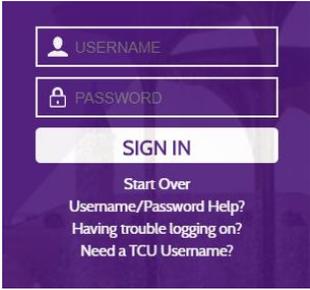
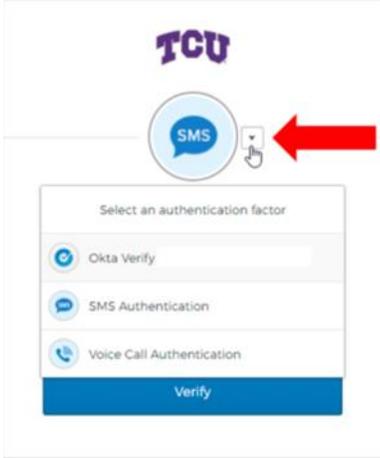


Logging In

Login via Notification Email

<p>1. Select the link provided in the notification email.</p>	
<p>2. Use TCU credentials to complete Single Sign-on (SSO)</p>	
<p>3. Complete authentication by selecting one of the following options:</p> <ul style="list-style-type: none">a) Okta Verifyb) SMS Authenticationc) Voice Call Authentication <p>Note: For more information about Okta enrollment and verification, visit it.tcu.edu/okta</p>	

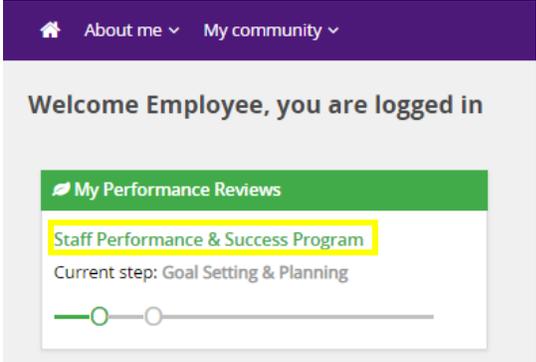
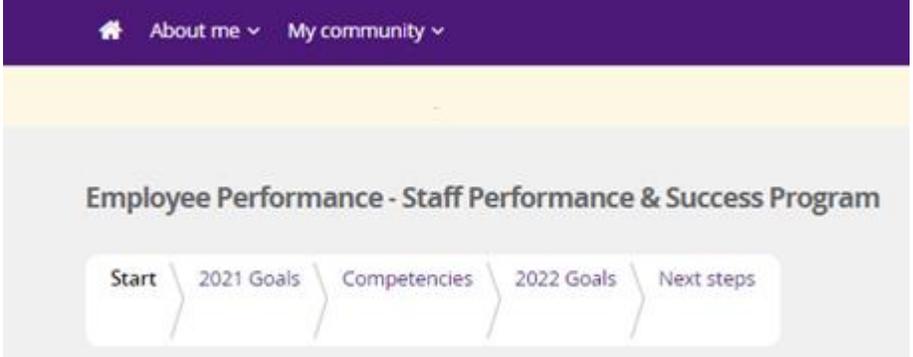
Login via PeopleSoft

<p>1. Login to my.tcu.edu</p>	
<p>2. Select the Employee Center tile</p>	
<p>3. Select the Staff Performance & Success tile</p>	
<p>4. Complete authentication by selecting one of the following options:</p> <ul style="list-style-type: none"> a) Okta Verify b) SMS Authentication c) Voice Call Authentication <p>Note: For more information about Okta enrollment and verification, visit it.tcu.edu/okta</p>	

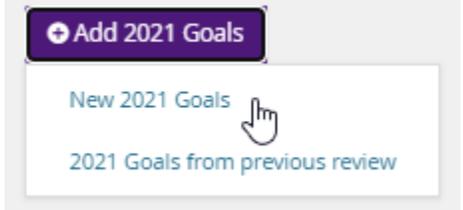
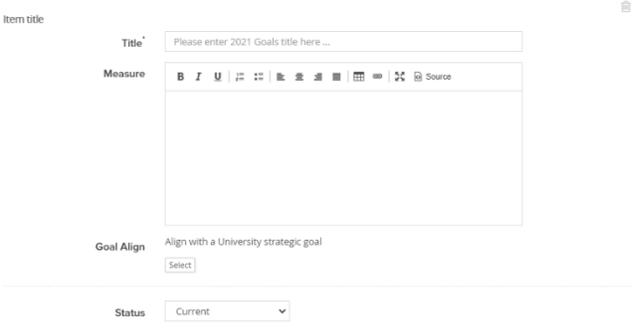
Navigating the Evaluation

Employee

Goal Setting & Planning

<p>1. Select “Staff Performance & Success Program” in “My Performance Reviews” section of the dashboard</p>	
<p>2. Follow instructions to complete Goal Setting & Planning</p>	

Adding Goals

<p>1. Select the “New 2021 Goals” after selecting the “Add 2021 Goals” button</p> <p>Note: If you did not add goals in the 2020 Staff Feedback & Evaluation within PageUp, you only select “Add 2021 Goals” button</p>	
<p>2. Complete the information requested for the goal:</p> <ol style="list-style-type: none"> Title: State the goal Measure: Detailed description of the goal Goal Align: Align goal to one of the University’s strategic goals Status: Current, Complete, No longer achievable, Cancelled 	

3. Select the "Save" button at the bottom of the goal	
4. Repeat steps 1-3 until all goals are added	

Editing & Deleting Goals

1. To edit , select the pencil icon on the right side of the goal	<p>▼ Goal 1 Title Current</p> <p>Goal 1 Details</p> <div style="text-align: right;">  </div>
2. Make any desired edits	<p>Item title 🗑️</p> <p>Title* <input type="text" value="Please enter Goals title here ..."/></p> <p>Measure 📄 Source</p> <p>B I U </p> <p>Goal Align Align this item to a corporate objective</p> <p><input type="button" value="Select"/></p> <hr/> <p>Status Current ▼</p>
3. Select the "Save" button at the bottom of the goal	
4. To delete , select the pencil icon on the right side of the goal	<p>▼ Goal 1 Title Current</p> <p>Goal 1 Details</p> <div style="text-align: right;">  </div>
5. Select the trash can icon on the right side of the goal	<p>Item title 🗑️</p> <p>Title* <input type="text" value="Please enter Goals title here ..."/></p> <p>Measure 📄 Source</p> <p>B I U </p> <p>Goal Align Align this item to a corporate objective</p> <p><input type="button" value="Select"/></p> <hr/> <p>Status Current ▼</p>

Commenting on Goals

<p>1. Ensure the goal that you want to comment on is saved.</p>	
<p>2. After the goal is saved, select "Add Comment" button</p>	
<p>3. Enter your comment and select either "Save" or "Save as Draft"</p> <ul style="list-style-type: none"> - Save: Publishes the comment immediately for viewing. Note - At any time during this portion of the process you can edit or delete comments that are Saved & Shared. - Save as Draft: Saves a draft of the comment that is only viewable by you. Note - At any time during this portion of the process you can edit, publish, or delete comments that have been Saved as Private. 	
<p>4. Repeat steps 1 & 2 for all applicable goals</p>	

Editing & Deleting Comments on Goals

<p>1. Select the three (3) dots on the right side of the saved comment</p>	
<p>2. To edit, select "Edit," make any desired changes to the comment, and select "Save"</p>	
<p>3. To delete, select "Delete"</p>	<p>There are no comments for this goal.</p>

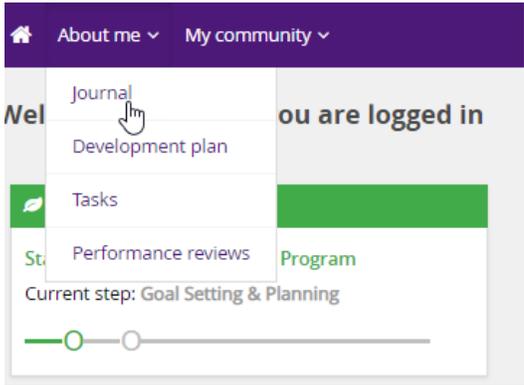
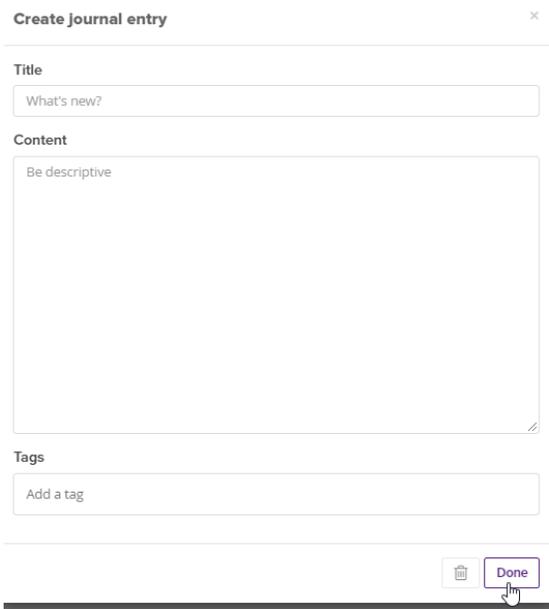
Uploading Supporting Documents to Goals

<p>1. Select "Upload file" on the "Add comment" dropdown menu</p>	
<p>2. Select "Choose File" to browse your computer for the appropriate file and add a description for the file</p>	<p>File: <input type="button" value="Choose File"/> No file chosen</p> <p>Description: <input type="text"/></p> <p>Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png</p>
<p>3. Select "Upload file"</p> <p>Note: See instruction for deleting comments above to learn out to delete any uploaded files.</p>	

Working, Learning, Journaling

You are encouraged to use this time to perform assigned tasks, attend or facilitate training opportunities that support success, and note accomplishments and/or needs using PageUp’s journal feature.

Creating a Journal Entry in PageUp

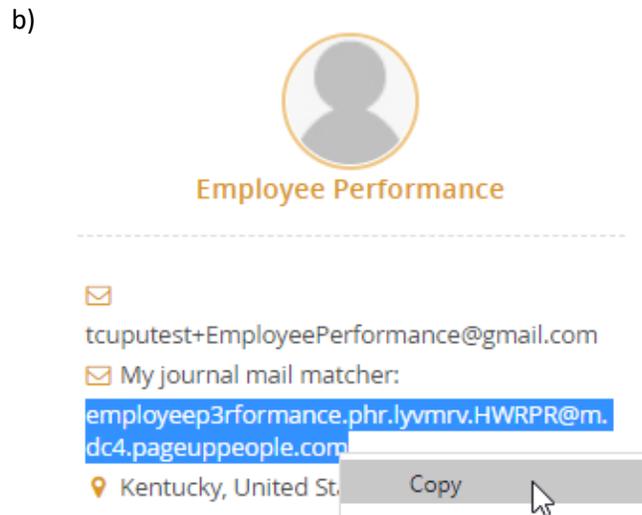
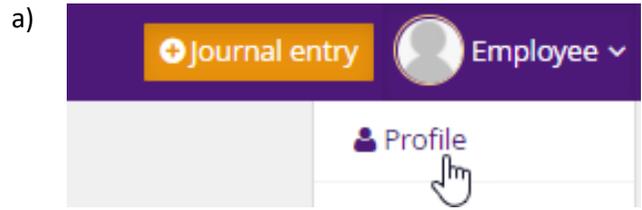
<p>1. From the Employee Portal homepage, select “About me” then “Journal”</p>	
<p>2. Select the + (plus) icon</p>	
<p>3. In the Create journal entry pop up, enter the following:</p> <ul style="list-style-type: none"> a) Title - a quick reminder of the item you captured. b) Content - details of the entry c) Tags - as you type any previously used tags will display for selection. Tags are a way to categorize journal entries and can be used to group related entries when searching through your journal quickly <p>4. Select “Done” to Save</p>	

Creating a Journal Entry with My Journal Mail Matcher

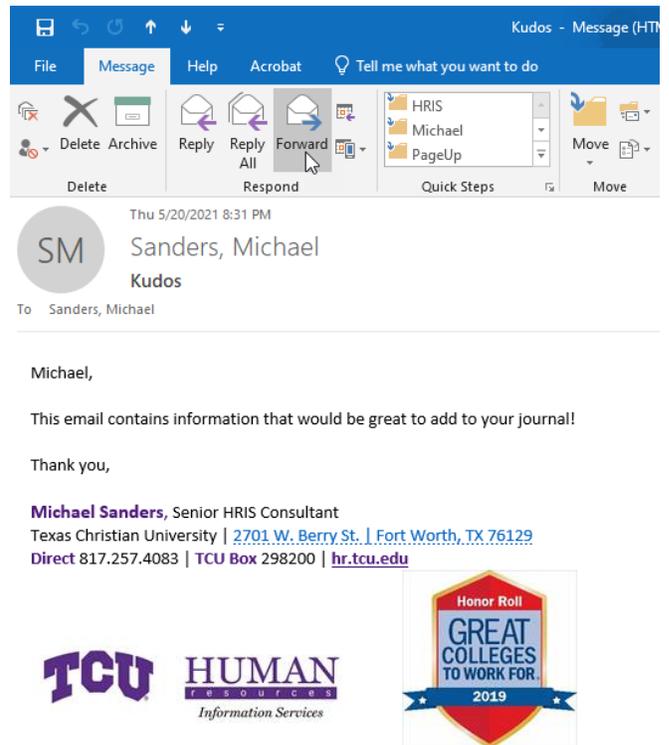
Mail matcher makes it quick and easy for you to add information contained in e-mails into your PageUp journal. Once an email is added to your journal, it can be linked to your or your direct reports’ performance review.

1. Identify your Mail matcher email address
 - a) Hover over your name on the right-hand side of the Employee Services homepage and select profile
 - b) Copy "My journal mail matcher" email

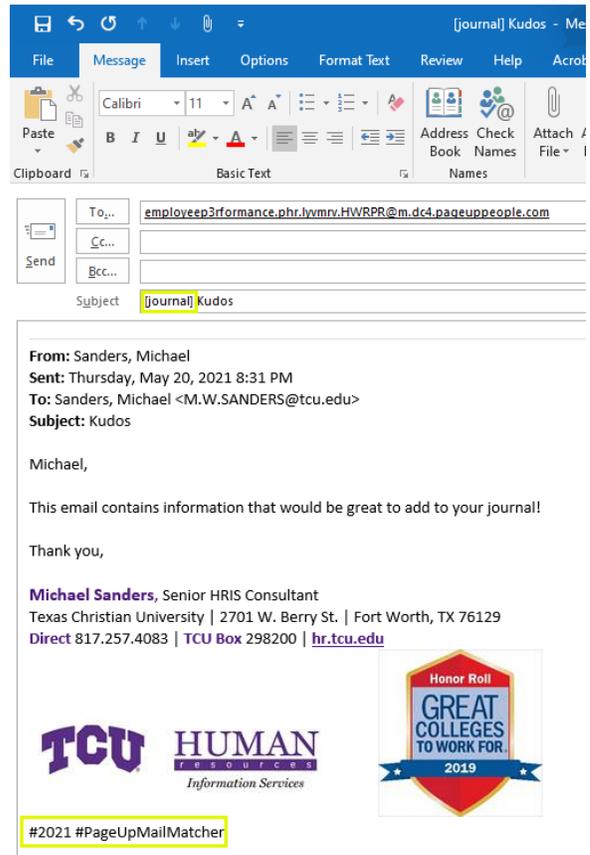
NOTE: Your "My journal mail matcher" is specific to you. Do not use the mail matcher email in the example picture.



2. Identify an email that you would like to add to your journal and select forward

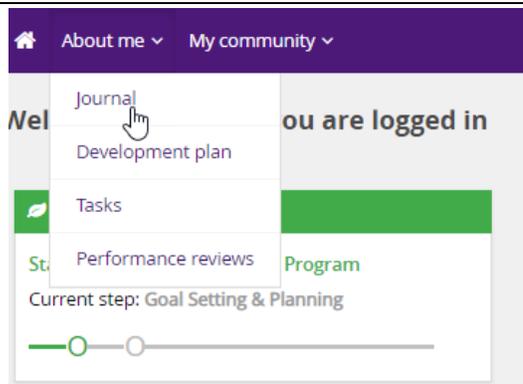


3. Place “[journal]” anywhere in the subject line along with the desired title of your journal entry
4. Create tags by typing “#” followed by the desired tag
Ex) #2021 #PageUpMailMatcher
5. Send email

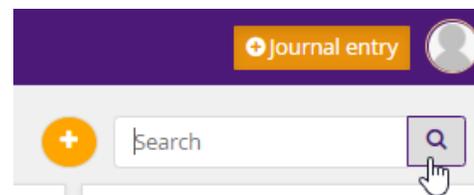


Searching for a Journal Entry

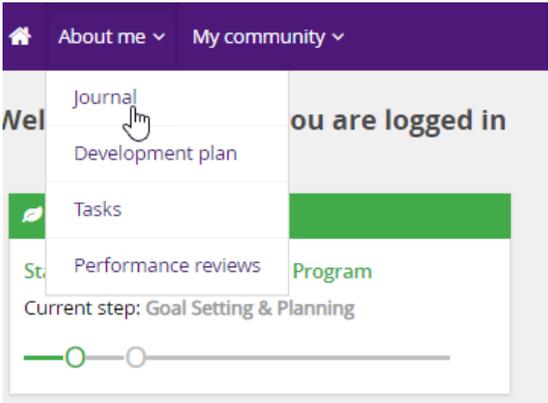
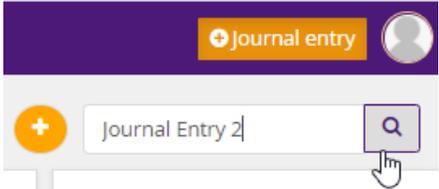
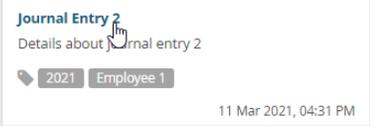
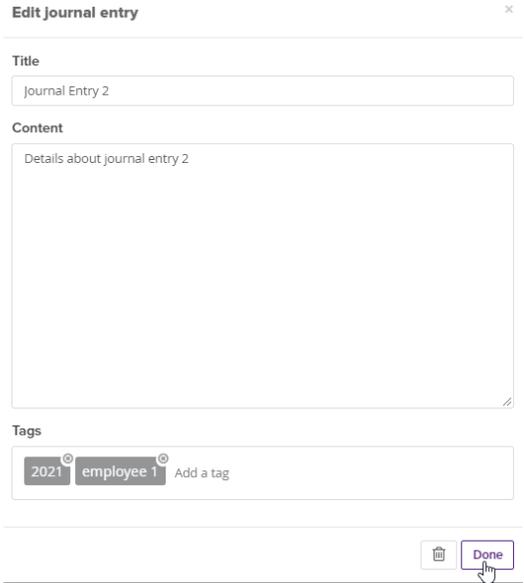
1. From the Employee Portal homepage, select “About me” then “Journal”



2. Browse the list of entries or use the “Search” field to locate the desired entry by title, content, or tag. Select the magnifying glass icon to load any results



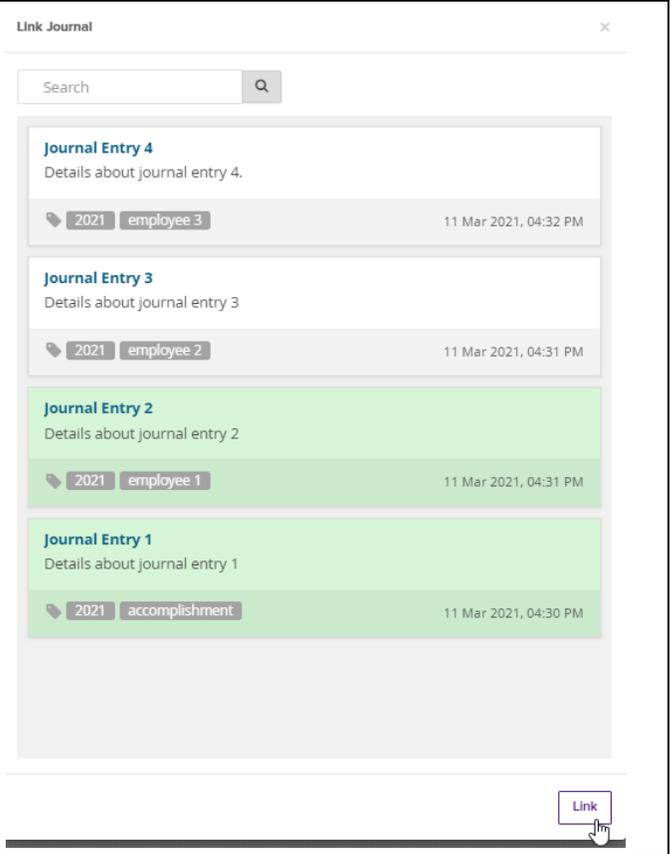
Reading Journal Entries

<p>1. From the Employee Portal homepage, select “About me” then “Journal”</p>	
<p>2. Browse the list of entries or use the “Search” field to locate the desired entry by title, content, or tag. Select the magnifying glass icon to load any results</p>	
<p>3. Select the appropriate entry</p>	
<p>4. View, edit, or delete the full entry</p> <p>5. Select “Done” to keep any changes or “X” to close the window</p>	

Linking Journal Entries in Comments

<p>1. Select “Link journal entry” on the “Add comment” dropdown menu</p>	
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2. Browse the list of entries or use the “Search” field to locate the desired entry by title, content, or tag. Select the magnifying glass icon to load any results
3. Select desired journal entry/entries
4. Select “Link”



Goal Check-in & Feedback

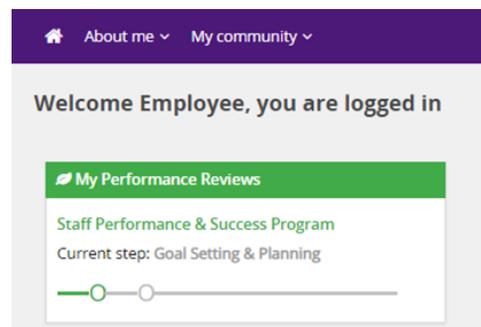
During this step, managers and individual contributors should work together to assess the status of previously established goals. Consider accomplishments to date, upcoming assignments, and desired outcomes. This is an opportunity to share feedback and identify potential resources and support needed to be successful.

You may also continue performing assigned tasks, attending or facilitating training opportunities that support success, and noting accomplishments and/or needs using PageUp’s journal feature.

Note: See Journaling instructions in “Working, Learning, Journaling” section above.

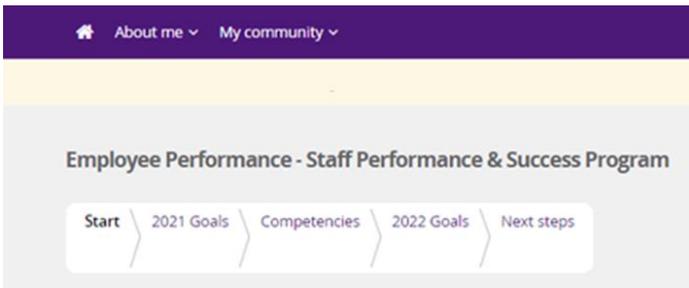
Employee Self-Evaluation

1. Select “Staff Performance & Success Program” in “My Performance Reviews” section of the dashboard



2. Follow instructions within the evaluation to complete your self-evaluation

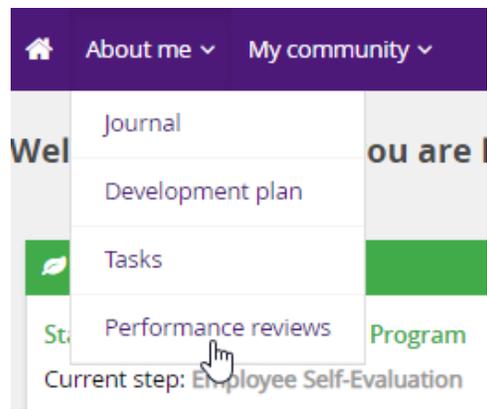
Note: The self-evaluation portion of the process will automatically move to the next step on the due date. You will not be able to edit your self-evaluation after the allotted time frame is complete.



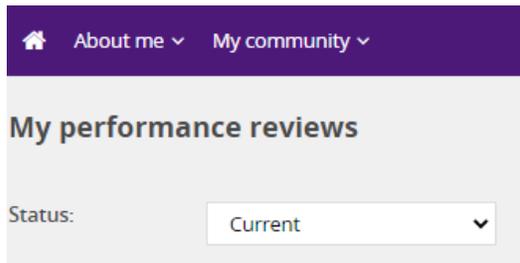
Saving Self-Evaluation Data

1. From the Employee Portal homepage, select "About me" then "Performance reviews"

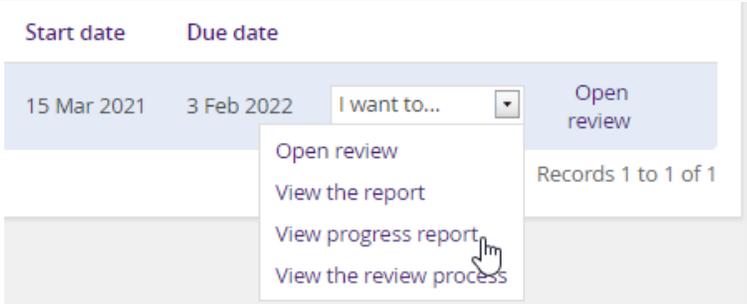
Note: This report must be accessed during the Self-Evaluation step. Once the self-evaluation period has closed, you will not be able to access this report until after the Manager Evaluation & Meeting is complete.



2. Set "Status" to "Current"



3. Select "View progress report" in the "I want to..." dropdown menu



4. When the report opens, select the printer icon on the top, right-hand corner of the page



<p>5. Print or save report as PDF</p>	
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Manager Evaluation & Meeting

<p>No action required from employee during this step. Manager will complete evaluation and schedule a meeting to discuss the details of the evaluation.</p>	
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Evaluation Acknowledgement

<p>1. Access your evaluation</p> <p>Note: See step 1 of "Employee Self-Evaluation" to review how to access your evaluation.</p>	
<p>2. Review your evaluation</p> <p>Note: At this stage, the evaluation is not able to be edited. If you have a significant edit that cannot be addressed in your final comments, discuss with your manager.</p>	
<p>3. Add final comments (if applicable)</p>	

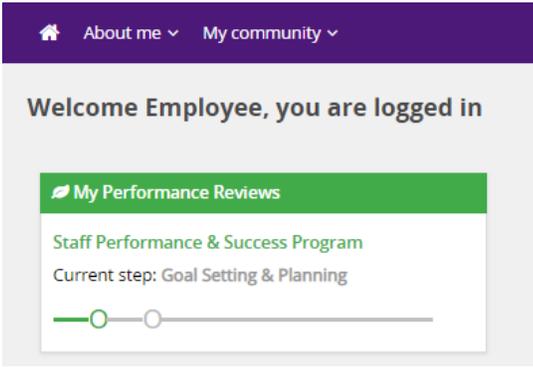
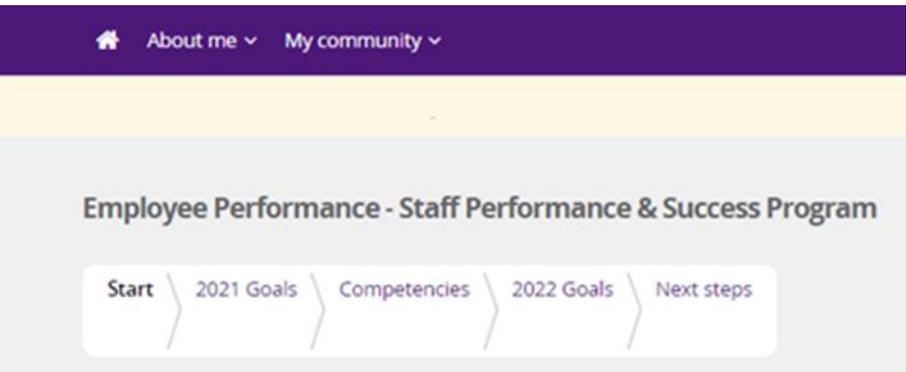
<p>4. Acknowledge your evaluation</p>	<p>Your next step: Evaluation Complete</p>  <p>Cannot progress the review to the next step</p> <p>Acknowledgement Acknowledgement is required to progress this review to the next step. Please ensure you acknowledge the objectives in this review to proceed.</p> <p><input checked="" type="checkbox"/> Notify Manager after you acknowledge</p> <p>Employee, do you acknowledge your review? I acknowledge</p> <p><i>Manager has not acknowledged this review</i></p>
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Evaluation Complete

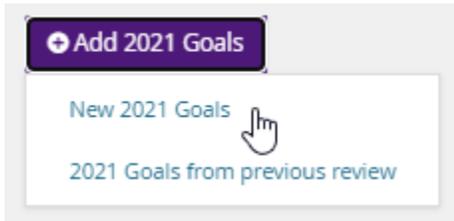
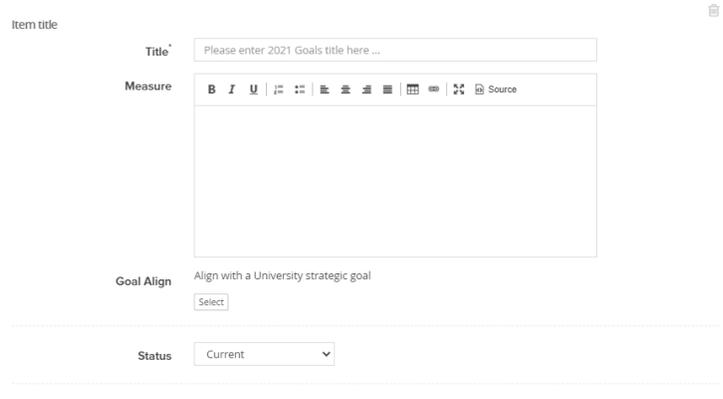
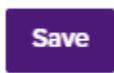
<p>After your manager acknowledges the evaluation, the process is complete.</p>	
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Manager/Leader

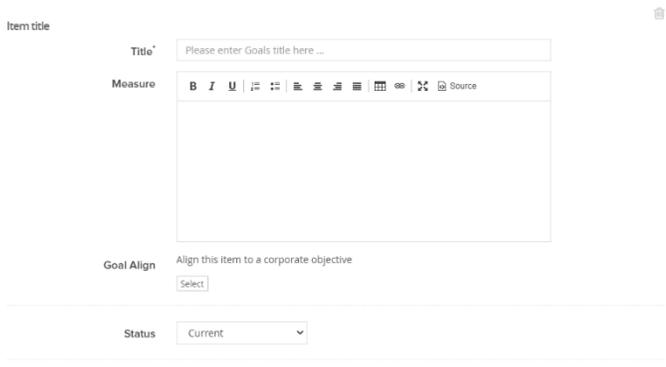
Goal Setting & Planning

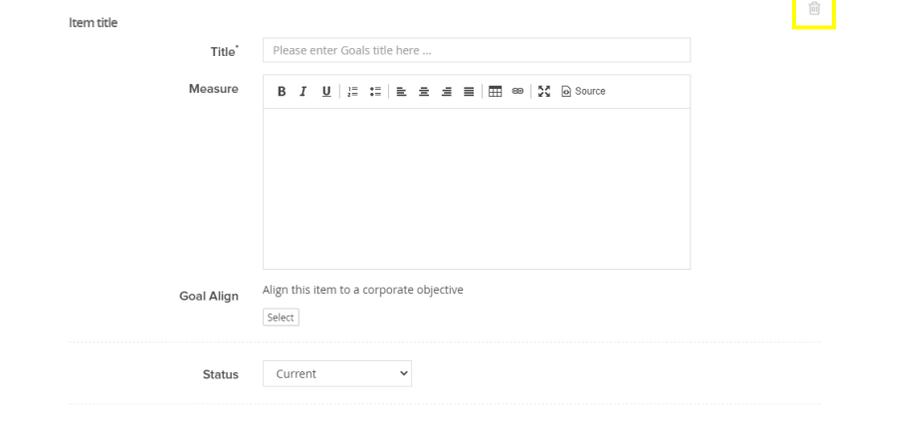
<p>1. Select “Staff Performance & Success Program” in “My Performance Reviews” section of the dashboard</p>	
<p>2. Follow instructions to complete Goal Setting & Planning</p>	

Adding Goals

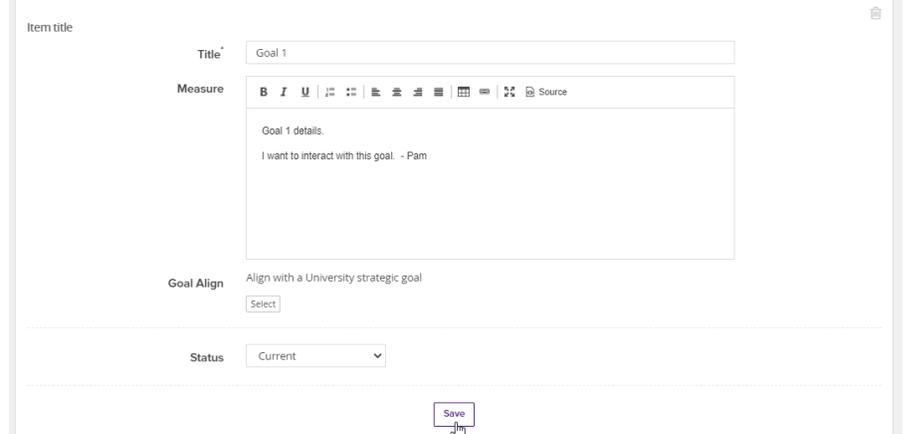
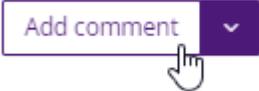
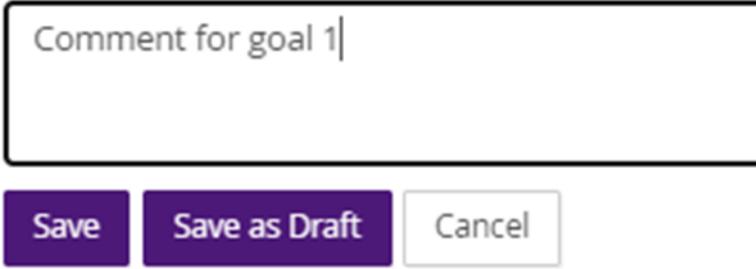
<p>1. Select the “New 2021 Goals” after selecting the “Add 2021 Goals” button</p> <p>Note: If you did not add goals in the 2020 Staff Feedback & Evaluation within PageUp, you only select “Add 2021 Goals.”</p>	
<p>2. Complete the information requested for the goal:</p> <ol style="list-style-type: none"> Title: State the goal Measure: Detailed description of the goal Goal Align: Align goal to one of the University’s strategic goals Status: Current, Complete, No longer achievable, Cancelled 	
<p>3. Select the “Save” button at the bottom of the goal</p>	
<p>4. Repeat steps 1-3 until all goals are added</p>	

Editing & Deleting Goals

<p>1. To edit, select the pencil icon on the right side of the goal</p>	
<p>2. Make any desired edits</p>	

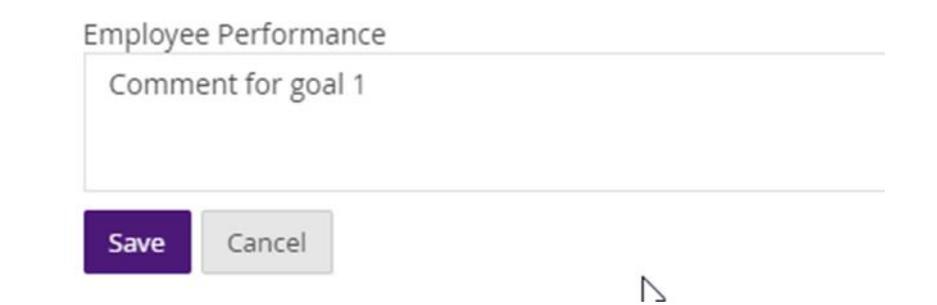
<p>3. Select the “Save” button at the bottom of the goal</p>	
<p>4. To delete, select the pencil icon on the right side of the goal</p>	
<p>5. Select the trash can icon on the right side of the goal</p>	

Commenting on Goals

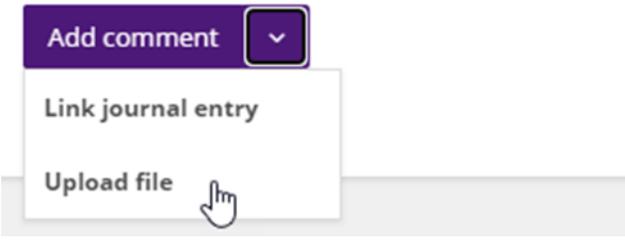
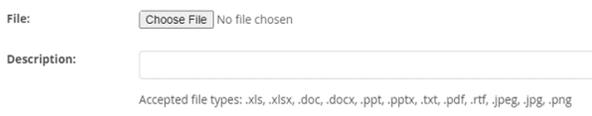
<p>1. Ensure the goal that you want to comment on is saved.</p>	
<p>2. After goal is saved, select “Add Comment” button</p>	
<p>3. Enter your comment and select either “Save” or “Save as Draft”</p> <p>- Save: Publishes the comment immediately for viewing. Note - At any time during this portion of the process you can edit or delete comments that are Saved & Shared.</p>	

<p>- Save as Draft: Saves a draft of the comment that is only viewable by you. Note - At any time during this portion of the process you can edit, publish, or delete comments that have been Saved as Private.</p>	
<p>4. Repeat steps 1 & 2 for all applicable goals</p>	

Editing & Deleting Comments on Goals

<p>1. Select the three (3) dots on the right side of the saved comment</p>	
<p>2. To edit, select "Edit," make any desired changes to the comment, and select "Save"</p>	
<p>3. To delete, select "Delete"</p>	<p style="text-align: center;">There are no comments for this goal.</p>

Uploading Supporting Documents to Goals

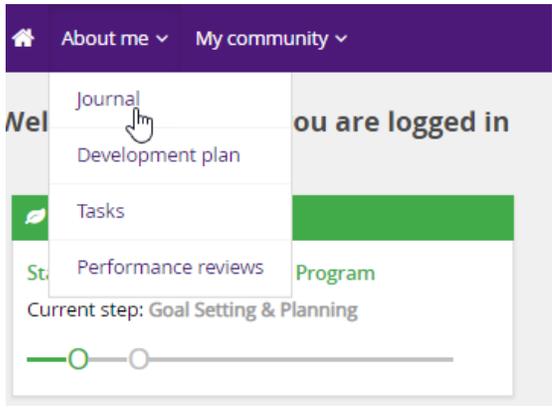
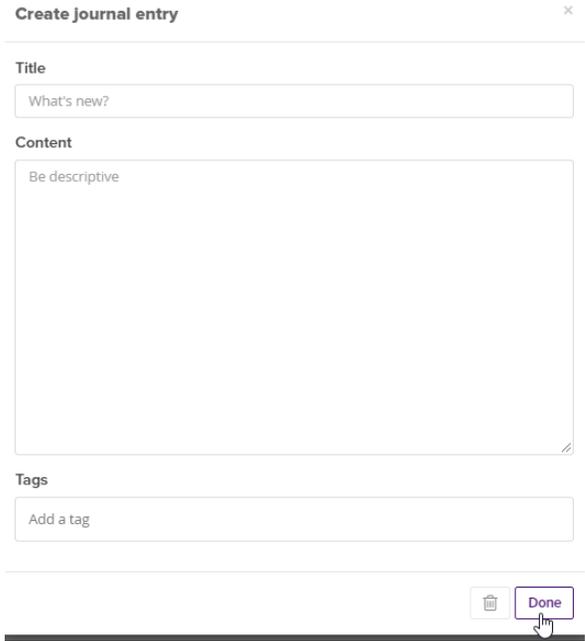
<p>1. Select "Upload file" on the "Add comment" dropdown menu</p>	
<p>2. Select "Choose File" to browse your computer for the appropriate file and add a description for the file</p>	

<p>3. Select "Upload file"</p> <p>Note: See instruction for deleting comments above to learn out to delete any uploaded files.</p>	
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Working, Learning, Journaling

You are encouraged to use this time to perform assigned tasks, attend or facilitate training opportunities that support success, and note accomplishments and/or needs using PageUp's journal feature.

Creating a Journal Entry

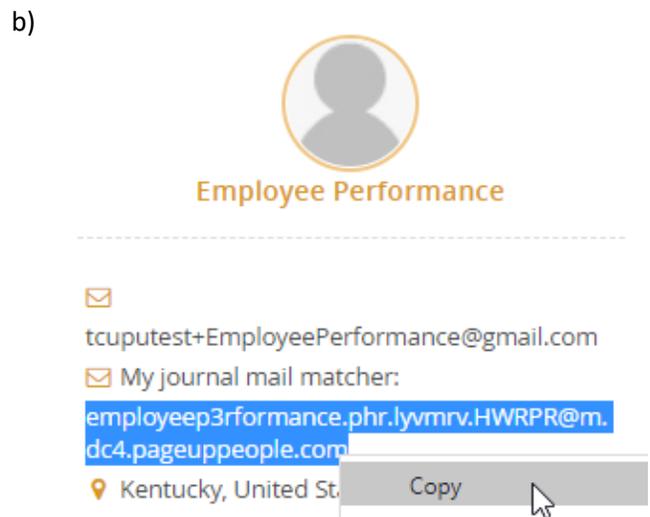
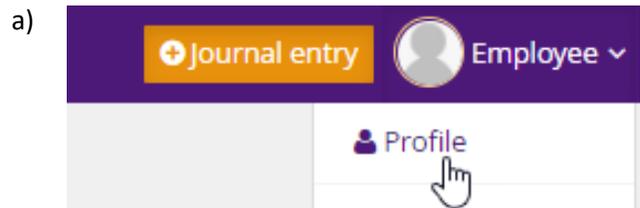
<p>1. From the Employee Portal homepage, select "About me" then "Journal"</p>	
<p>2. Select the + (plus) icon</p>	
<p>3. In the Create journal entry pop up, enter the following:</p> <ul style="list-style-type: none"> a) Title - a quick reminder of the item you captured. b) Content - details of the entry c) Tags - as you type any previously used tags will display for selection. Tags are a way to categorize journal entries and can be used to group relates entries when searching through your journal quickly <p>4. Select "Done" to Save</p>	

Creating a Journal Entry with My Journal Mail Matcher

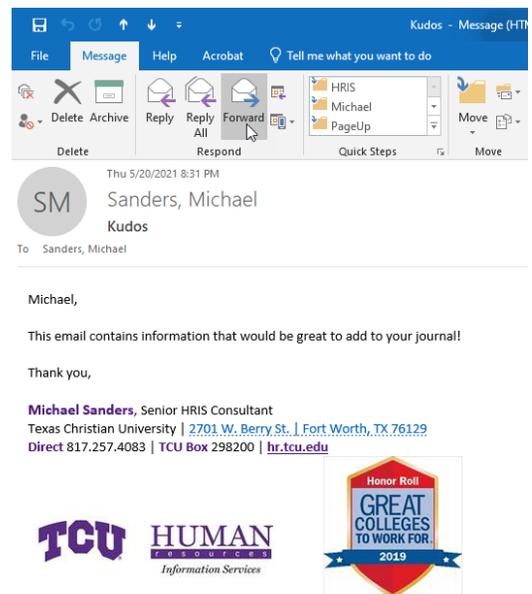
Mail matcher makes it quick and easy for you to add information contained in e-mails into your PageUp journal. Once an email is added to your journal, it can be linked to your or your direct reports' performance review.

1. Identify your Mail matcher email address
 - a) Hover over your name on the right-hand side of the Employee Services homepage and select profile
 - b) Copy "My journal mail matcher" email

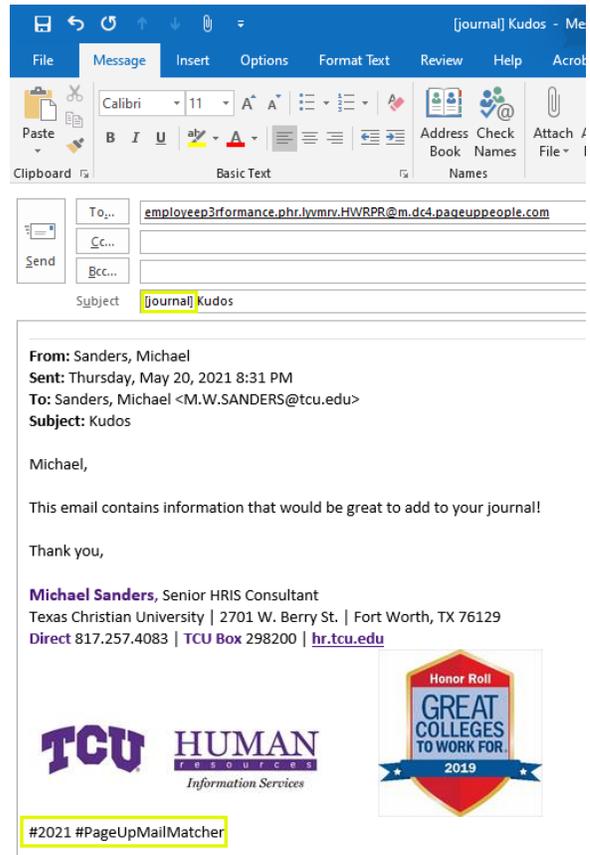
NOTE: Your "My journal mail matcher" is specific to you. Do not use the mail matcher email in the example picture.



2. Identify an email that you would like to add to your journal and select forward

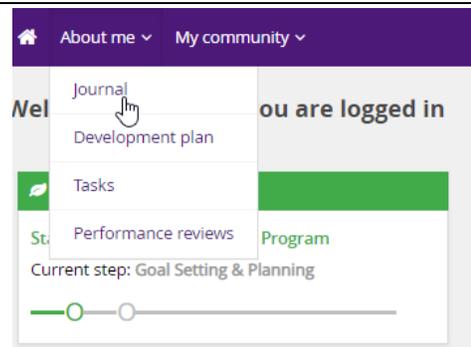


3. Place “[journal]” anywhere in the subject line along with the desired title of your journal entry
4. Create tags by typing “#” followed by the desired tag
Ex) #2021 #PageUpMailMatcher
5. Send email

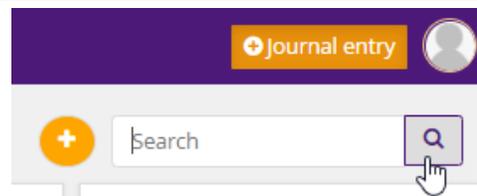


Searching for a Journal Entry

1. From the Employee Portal homepage, select “About me” then “Journal”



2. Browse the list of entries or use the “Search” field to locate the desired entry by title, content, or tag. Select the magnifying glass icon to load any results



Reading Journal Entries

<p>1. From the Employee Portal homepage, select “About me” then “Journal”</p>	
<p>2. Browse the list of entries or use the “Search” field to locate the desired entry by title, content, or tag. Select the magnifying glass icon to load any results</p>	
<p>3. Select the appropriate entry</p>	
<p>4. View, edit, or delete the full entry</p> <p>5. Select “Done” to keep any changes or “X” to close the window</p>	

Linking Journal Entries in Comments

<p>1. Select “Link journal entry” on the “Add comment” dropdown menu</p>	
<p>2. Browse the list of entries or use the “Search” field to locate the desired entry by title, content, or tag. Select the magnifying glass icon to load any results</p> <p>3. Select desired journal entry/entries</p> <p>4. Select “Link”</p>	

Goal Check-in & Feedback

During this step, managers and individual contributors should work together to assess the status of previously established goals. Consider accomplishments to date, upcoming assignments, and desired outcomes. This is an opportunity to share feedback and identify potential resources and support needed to be successful.

You may also continue performing assigned tasks, attending or facilitating training opportunities that support success, and noting accomplishments and/or needs using PageUp’s journal feature.

Note: See Journaling instructions in “Working, Learning, Journaling” section above.

Employee Self-Evaluation

<p>No action required from manager during this step. Employee can complete the self-evaluation during the allotted time and the process will move to the next step automatically when the due date is reached.</p>	
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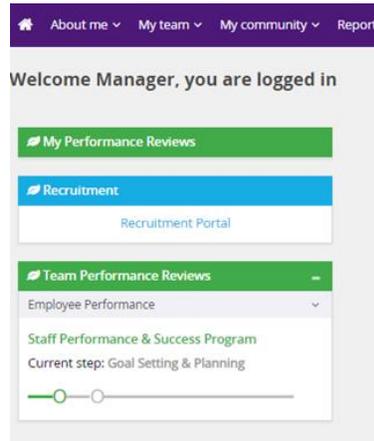
Manager Evaluation & Meeting

<p>1. Select “Staff Performance & Success” for the appropriate employee in the “Team Performance Reviews” section of the dashboard</p>	
<p>2. Follow instructions within the evaluation to complete the Manager Evaluation & Meeting</p> <p>Note: Before moving the process into Evaluation Acknowledgement, please meet with the employee to discuss the details of their evaluation.</p>	
<p>3. Once you have completed the evaluation and met with the employee, move evaluation to next step on the final page of the evaluation</p>	

Evaluation Acknowledgement

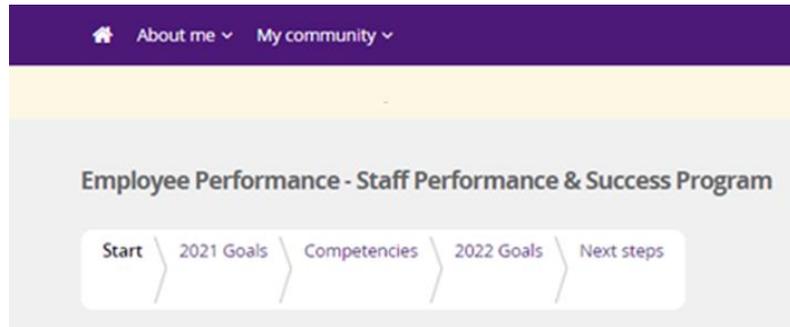
1. After your employee has acknowledged the completion of the process, access their evaluation

Note: See step 1 of “Manager Evaluation & Meeting” to review how to access the evaluation.



2. Review the evaluation

Note: At this stage, the evaluation is not able to be edited. If you have a significant edit that can't be addressed in the Final Comments section, contact Human Resources.



3. Add final comments (if applicable)

Final comments

Employee Performance

Employee Evaluation final comments.

Manager Performance



Manager final comments|

4. After your employee acknowledges their evaluation, complete the process by acknowledging their evaluation as well

Your next step: Evaluation Complete



Acknowledgement

Acknowledgement is required to progress this review to the next step. Please ensure you acknowledge the objectives in this review to proceed.

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

Approved by Employee Performance on 02 Nov 2020 at 3:39 PM

Manager, as the manager, do you acknowledge Employee's review?

Evaluation Complete

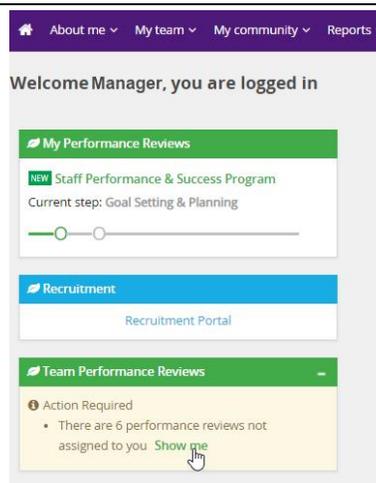
After both acknowledgements are complete, the evaluation process is complete.



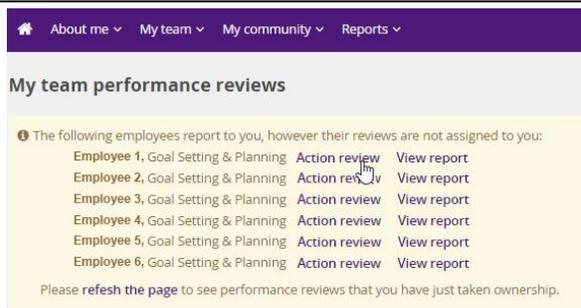
Taking Ownership of an Evaluation

1. Log into PageUp employee services and select “Show me” in the “Action Required” message box

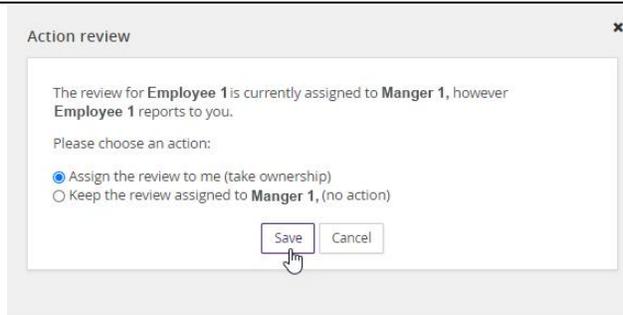
Note: For more information about logging in to PageUp, see “Login via PeopleSoft” section on page 5.



2. Select “Action review”



3. Select “Assign the review to me (take ownership)”



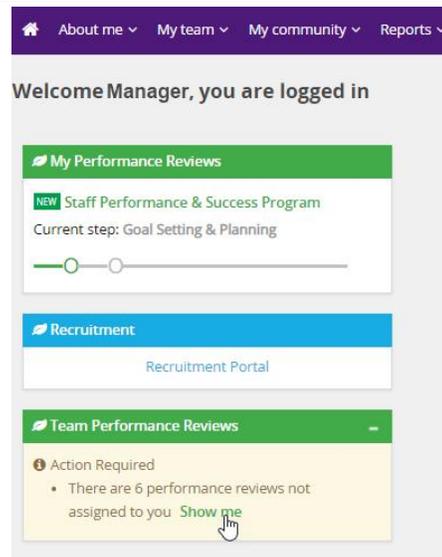
4. Repeat steps 1-3 for each employee



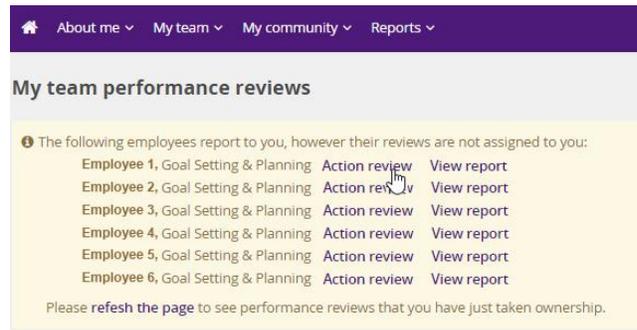
Releasing Ownership of an Evaluation

1. Log into PageUp employee services and select “Show me” in the “Action Required” message box

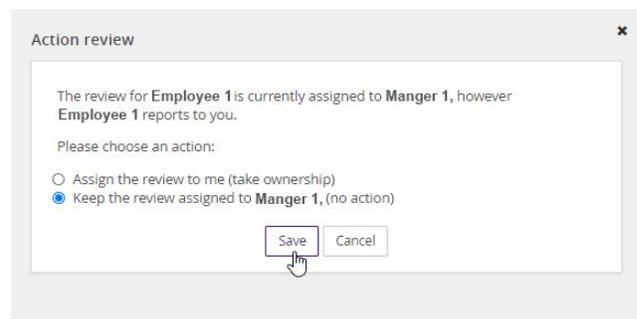
Note: For more information about logging in to PageUp, see “Login via PeopleSoft” section on page 5.



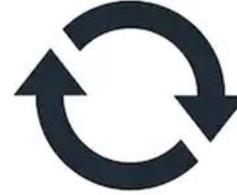
2. Select “Action review”



3. Select “Keep the review assigned to [MANAGER NAME], (no action)



4. Repeat steps 1-3 for each employee



Accessing Completed Evaluations

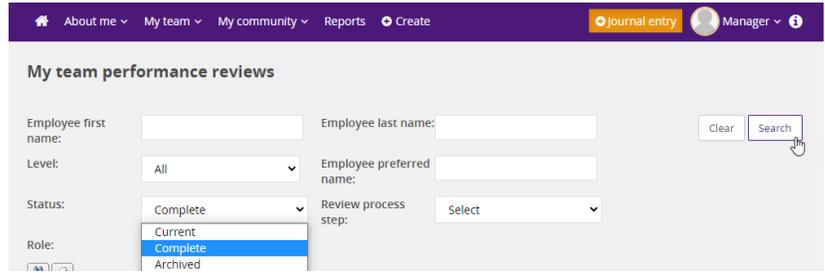
Employee

<p>1. Select "Performance reviews" in the "About me" dropdown menu.</p>															
<p>2. Change status to Complete and select "Search"</p>															
<p>3. Select "View the report" on the "I want to..." dropdown menu</p>	<table border="1"> <thead> <tr> <th>Review process</th> <th>Review step</th> <th>Manager</th> <th>Role</th> <th>Start date</th> <th>Due date</th> <th>I want to...</th> </tr> </thead> <tbody> <tr> <td>Staff Evaluation - 2020</td> <td>Evaluation Complete</td> <td>Manager Performance</td> <td>Dir Nursing</td> <td>29 Oct 2020</td> <td>16 Jan 2021</td> <td>View the report</td> </tr> </tbody> </table>	Review process	Review step	Manager	Role	Start date	Due date	I want to...	Staff Evaluation - 2020	Evaluation Complete	Manager Performance	Dir Nursing	29 Oct 2020	16 Jan 2021	View the report
Review process	Review step	Manager	Role	Start date	Due date	I want to...									
Staff Evaluation - 2020	Evaluation Complete	Manager Performance	Dir Nursing	29 Oct 2020	16 Jan 2021	View the report									

Manager

<p>1. Select "Performance reviews" in the "My team" dropdown menu.</p>	
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2. Change status to Complete and select "Search"



My team performance reviews

Employee first name: Employee last name: Clear Search

Level: All Employee preferred name:

Status: Complete Review process step: Select

Role:

- Current
- Complete**
- Archived

3. Select "View the report" on the "I want to..." dropdown menu

Review process	Review step	Manager	Role	Start date	Due date	
Staff Evaluation - 2020	Evaluation Complete	Manager Performance	Dir Nursing	29 Oct 2020	16 Jan 2021	I want to... <input type="text"/>

Page 1 of 1 Jump to page

View the report
View the review process
View the report