



HUMAN RESOURCES
VIRGINIA TECH.

Employee Involvement in Performance Management

Employee Relations Department

2020



Contents

Performance Management Introduction.....	3
Performance Management Definitions	6
Performance Management Menus	7
<i>Performance Main Menu</i>	7
<i>Performance Plan Menu</i>	7
<i>Performance Evaluation Menu</i>	8
Create/Edit a Performance Plan	9
<i>Create/Edit Goals</i>	13
<i>Create/Edit Competencies</i>	14
<i>Create/Edit Career Development</i>	14
<i>Printing/Saving Performance Plan</i>	15
<i>Send to Supervisor</i>	15
<i>Next Steps</i>	15
Performance Plan Acknowledgment of Receipt	16
Creating Your Self-Evaluation.....	17
<i>Enter Results and Accomplishments</i>	19
<i>Select Competency Ratings</i>	20
<i>Select Overall Rating</i>	21
<i>Printing/Saving Performance Evaluation</i>	22
<i>Send to Supervisor</i>	22
<i>Next Steps</i>	23
Performance Evaluation Acknowledgement of Receipt	24
Performance Plan Status Definitions	27
Performance Evaluation Status Definitions	28

Performance Management Introduction

Get Prepared!

This is an important time in your career with Virginia Tech! Your involvement in the evaluation process is vital and essential to your personal and professional success.

We all know that evaluations can bring unnecessary feelings of anxiety, but it is a time to show them what you've got! Be ready to share your accomplishments, address shortcomings, ask questions, and plan for greater goals for next year. With frequent collaborative feedback between you and your supervisor, this yearly evaluation should not bring up any surprises. However, it is important to be prepared and ready for this important conversation!

To better prepare, you should:

- ***Understand the key elements of evaluation preparation.***
It is time to educate and involve yourself in the process.



The performance management program at Virginia Tech is used to help define and evaluate performance expectations. This program covers all University and Classified Staff. In addition, there are some areas of the university that use the program for AP faculty. The annual performance review period runs from November through October, in concordance with the State fiscal cycle. The following provides a brief description of the performance cycle.

- November begins the plan year with the review and implementation of the plan goals, competencies and career goals. Throughout the year, the plan can be modified and enhanced according to ongoing projects, performance adjustments, coaching and feedback.
- In August (may be earlier or later depending on the department), the supervisor requests employee input on overall job performance. This is the time for the employee to complete their self-evaluation based on the plan year goals. Once the self-evaluation is complete, the supervisor can begin their review of the employee. The supervisor completes their draft of the evaluation and sends it to the reviewer by the beginning of September.

Note: There may be variations in the timeline depending on your senior management area.

- Once the reviewer is satisfied with the evaluation, they submit it to the Budget Authority. Depending on management, the evaluation is either forwarded directly to the supervisor so that it can be communicated to the employee; or a senior management group may review the evaluations prior to releasing them to the supervisors for communication.
- The supervisor schedules a meeting with the employee to discuss the finalized employee evaluation before releasing the electronic copy to them.

- The supervisor and the employee should discuss the final evaluation no later than the end of October.
- The plan process begins again in November.

➤ **Review your performance and behaviors.**

- Are your goals up to date?

Hint: Frequent collaborative meetings with your supervisor, including open conversations about your goals, development plans, and performance, will allow all to stay current and the evaluation process to run smoothly without any surprises or upsets.

- Bring any notes or supportive documentation on main successes and achievements.

1. Consider the following points to give you specific pieces of evidence to help with your performance review:

- ✓ Targets are quantifiable results to be attained using measures such as output, throughout, sales, levels of service delivery, cost reduction, and reject rates.
- ✓ Tasks or projects are a distinct piece of work to be completed by a specific date to achieve defined results.

2. List the aspects of your work that have been the most satisfying throughout the year.

What were your main challenges, frustrations, or disappointments? Identify the steps you took to resolve them and/or suggestions for areas of improvement.

➤ **Gather support and evidence.**

Prepare a summary of a quick overview of how you feel you have done against your established goals and competencies. From your summary, complete a more detailed overview of the year and how you feel you have performed by way of an optional self-evaluation.

➤ **Look to the future and plan.**

Draft a manageable number of goals for the coming year (maximum five). These objectives can be a mixture of short- and long-term, innovative and routine, but should all be aligned to the college/department's goals and strategy along with providing a clear link to everyone's success. The S.M.A.R.T. tool should be used as a guide to ensure all goals are written clearly so everyone knows exactly what will be achieved, when they will be completed, and to what standards.

S	M	A	R	T
Specific	Measurable	Attainable	Realistic	Time-bound
<p>Do: Set real numbers with real deadlines.</p> <p>Don't: Say, "I want more visitors."</p>	<p>Do: Make sure your goal is trackable.</p> <p>Don't: Hide behind buzzwords like, "brand engagement," or, "social influence."</p>	<p>Do: Work towards a goal that is challenging, but possible.</p> <p>Don't: Try to take over the world in one night.</p>	<p>Do: Be honest with yourself- you know what you and your team are capable of.</p> <p>Don't: Forget any hurdles you may have to overcome.</p>	<p>Do: Give yourself a deadline.</p> <p>Don't: Keep pushing towards a goal you might hit, "some day."</p>

➤ **Identify developmental needs and career goals.**

- ✓ Provide a summary of development priorities for your current role, including suggested solutions, which can form the basis of individual's development objectives.
- ✓ Write your personal development plan. Keep in mind the following questions: What should you be able to do differently? Under what conditions? How well must it be done? What are you hoping to achieve? What impact will the learning outcome have on the business, or you personally?
- ✓ What are your career aspirations? What skills and development requirements do you need to reach that goal? Are you skilled now to make that move? If not, when will you be ready?

The more you prepare yourself, the more comfortable you will be with the performance management process. Additionally, maintain continuous collaborative feedback between with your supervisor as a key component to your personal and professional success and stay involved in your career.

If there are any questions, if you would like additional training, or if you require assistance with the performance management tool, please contact University Employee Relations: Rodney Irvin (540-231-5303), Vickie Mitchell (540-231-2850), or Tina Kapalin (540-231-4272).

Other Resources

Performance Management website - <https://www.hr.vt.edu/compensation-performance-management/performance.html>

Flowchart for the Performance Plan and Evaluation Process - <https://www.hr.vt.edu/compensation-performance-management/performance.html>

User Guides and Tutorials - <https://www.hr.vt.edu/compensation-performance-management/performance.html>

Performance Management Definitions

Performance Goals and/or Job Responsibilities involves establishing specific, measurable objectives (outcomes) to be accomplished within a specific time frame and/or using a specific approach.

Goal Theory setting suggests that it can serve as an effective tool for making progress by ensuring that participants have a clear awareness of what they must do to achieve or help achieve an objective.

Goal setting helps employees focus on specific aspects of their job that are related to the objectives for that review period.

Competencies behaviors, attributes or skills that are predictors of personal success in the workplace.

There are three universal competencies that have been pre-defined for all staff employees. They include:

- Teamwork
- Maintaining a Safe and Secure Work Environment
- Diversity Commitment

There are two additional competencies that are preselected for supervisors. They include:

- Engagement
- People Development

The job specific competencies are unique to each employee. Three to five job specific competencies should be selected. The selected competencies reflect how your work should be carried out and may be areas of specific focus for your job.

Career Development is often overlooked during the performance planning and review process. This is an opportunity for the employee and supervisor to discuss future plans in terms of professional development. If, for example, an employee wishes to move into a supervisory role in the next two years, then part of their career development plan may be to complete the supervisory skills workshops offered through University Organizational and Professional Development. In this case, the supervisor would be responsible for providing the funds to cover the cost of the program.

Remember that the career development plan is looking beyond the current performance review period towards acquiring skills for future opportunities. Training and other skills acquisition that is necessary for the employee's current role should be included in the goals section of the performance plan.

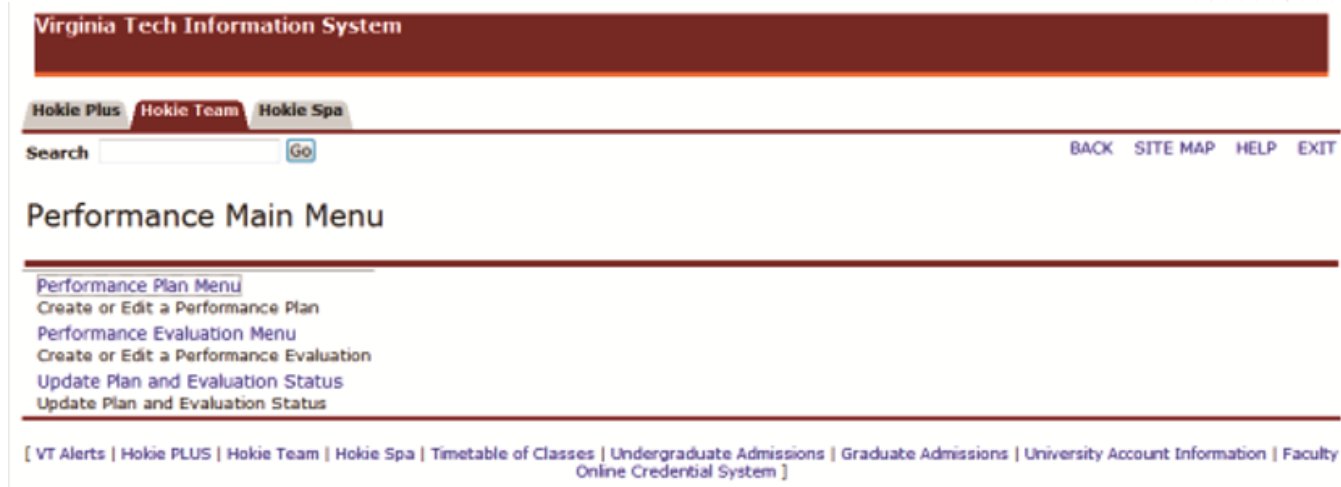
Individual objectives are what you achieve to ensure the overall strategic objectives are met.

Individual behaviors are how you meet your objectives in a way that supports the university's values.

Performance Management Menus

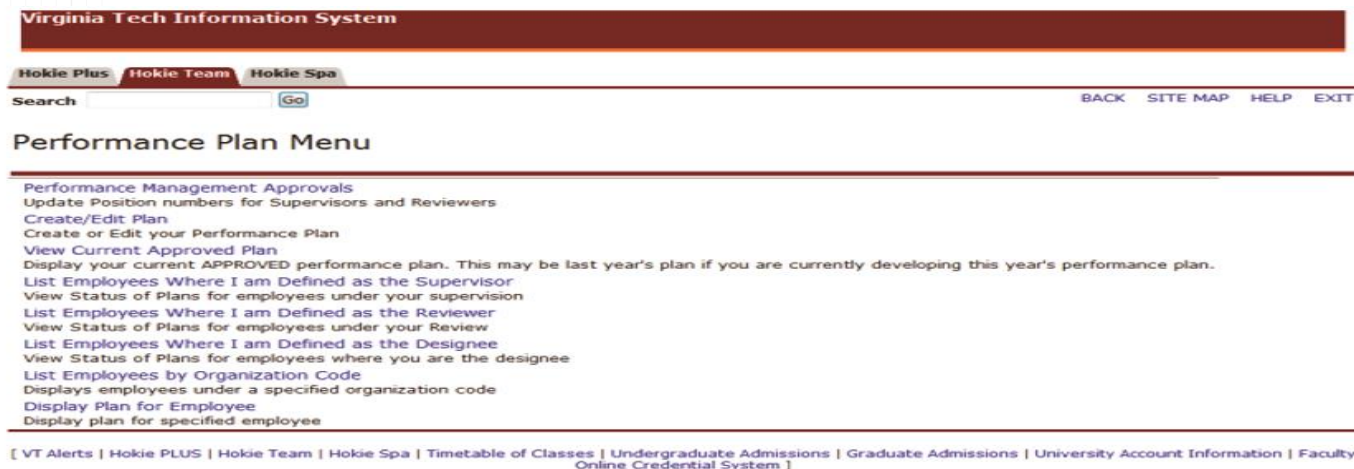
Performance Main Menu

- [Performance Plan Menu](#) - Create or edit performance plans. November - December timeframe
- [Performance Evaluation Menu](#) - Create or edit performance evaluations. July - October timeframe
- [Update Plan and Evaluation Status](#) - Used by performance management administrators.



Performance Plan Menu

- [Create/Edit Plan](#) - Used when creating or editing your own performance plan.
- [View Current Approved Plan](#) - View your current approved performance plan.
- [List Employees Where I am Defined as Supervisor](#) - Allows a person defined as a supervisor to view and approve plans.
- [List Employees Where I am Defined as Reviewer](#) - Allows a person defined as a reviewer to view and approve plans.
- [List Employees Where I am Defined as the Designee](#) - Allows a person defined as a designee to view and edit plans.
- [Display Plan for Employee](#) - Used to view plans just for a specific employee.



Performance Evaluation Menu

- [Create/Edit Self Evaluation](#) - Used when creating or editing your own self-evaluation.
- [View Current Approved Evaluation](#) - This will display your approved performance evaluation.
- [List Employees Where I am Defined as Supervisor](#) - Allows a person defined as a supervisor to view and create performance evaluations.
- [List Employees Where I am Defined as Reviewer](#) - Allows a person defined as a reviewer to view and approve performance evaluations.
- [List Employees by Organization Code](#) - Displays employees under a specific organization.
- [Display Evaluation for Employee](#) - Used to view performance evaluations for a specific employee.
- [List Employees Where I am Defined as the Designee](#) - Allows a person defined as a designee to edit and view performance evaluations.
- [Evaluation History](#) - Allows a designated person to view the history of a specific performance evaluation.

Virginia Tech Information System

[Hokie Plus](#) [Hokie Team](#) [Hokie Spa](#)

Search [Go](#) [BACK](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Performance Evaluation Menu

[Create/Edit Self Evaluation](#)
Create or Edit your Performance Evaluation

[View Current Approved Evaluation](#)
Display your current approved performance evaluation

[List Employees Where I am Defined as the Supervisor](#)
View status of evaluations for employees under your supervision

[List Employees Where I am Defined as the Reviewer](#)
View status of evaluations for employees under your review

[List Employees by Organization Code](#)
Displays employees under a specified organization code

[Display Evaluation for Employee](#)
Display evaluation for specified employee

[List Employees Where I am Defined as the Designee](#)
View status of evaluations for employees where you are listed as the designee

[Evaluation History](#)
View the history of the evaluations

[[VT Alerts](#) | [Hokie PLUS](#) | [Hokie Team](#) | [Hokie Spa](#) | [Timetable of Classes](#) | [Undergraduate Admissions](#) | [Graduate Admissions](#) | [University Account Information](#) | [Faculty Online Credential System](#)]

Create/Edit a Performance Plan

This option allows you to create or edit a performance plan. If your supervisor has created the performance plan, you may receive this email with the following information:

Dear { name}, {Supv name} has completed writing your {year} performance plan and has sent it to you for review and input.

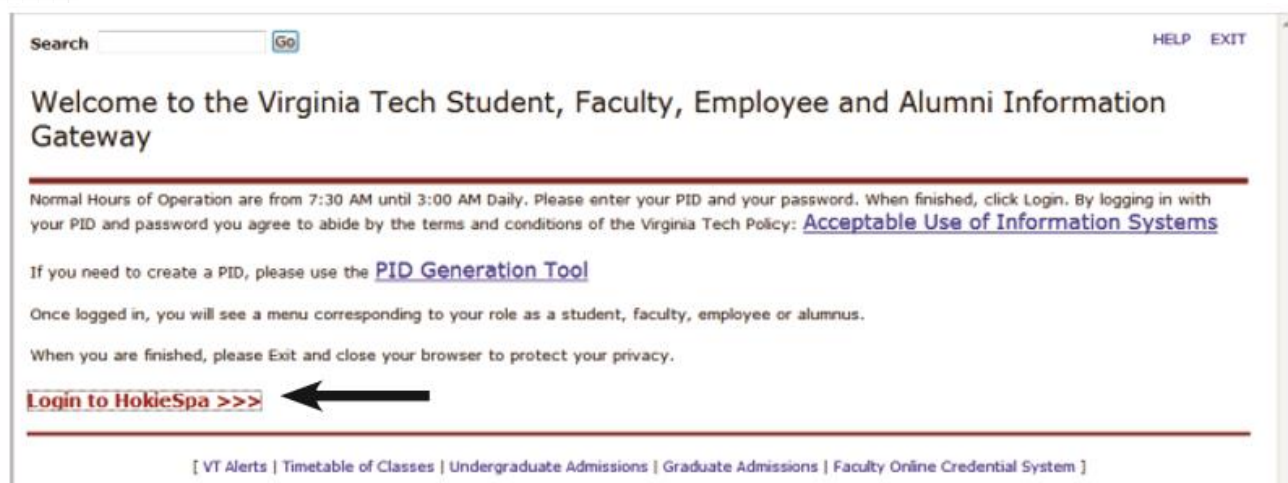
ACTION REQUIRED:

- Logon to the performance management tool via HOKIESPA (<https://login.vt.edu/profile/cas/login?execution=e1s1>) and select Performance Plan Menu.
- Select **"Create/Edit Plan"**.
- Edit the plan as necessary, then, scroll to the bottom of the plan and select **"View Performance Plan"**.
- Scroll to the bottom of the plan and select **"Send to Supervisor"**.

If there are any questions or if you require assistance with the performance management tool, please contact University Employee Relations: Rodney Irvin (540-231-5303), Vickie Mitchell (540-231-2850), or Tina Kapalin (540-231-4272).

1. Navigate to <https://login.vt.edu/profile/cas/login?execution=e1s1> and click on **Login to HokieSpa**. On the next screen log in with your PID and password.

Please Note: The system will time out after 30 minutes of inactivity so please save periodically.



2. Click on **Hokie Team**.

Virginia Tech Information System

Hokie Plus Hokie Team Hokie Spa

Search Go SITE MAP HELP EXIT

VT Alerts
Virginia Tech's notification system, comprised of a variety of methods by which the university can contact students, faculty, and staff.

Hokie PLUS
View and update your address(es) and phone number(s). View e-mail address(es). View and update emergency contact information. View name change & social security number change information. Change your password.

Hokie Team
Benefits, job data, paystubs, direct deposit enrollment or changes, W2 forms, W-4 and VA-4 data, leave balances, and Performance Management.

Hokie Spa
Register, View your Academic and Financial Aid records.

Timetable of Classes

Undergraduate Admissions
Apply for Undergraduate Admission. (Opens in new browser to external Web Site)

Graduate Admissions
File an application for admissions; Review existing applications, their status, and the status of supporting requirements. (Opens in new browser)

University Account Information
•View and Pay e-Bill •Add an Authorized Payer •Enroll or Adjust Direct Deposit Information •Enroll in the Budget Tuition Plan
•Enroll in the Graduate Student Payroll Deduction of Comprehensive Fees Program •View HOLDS •View 1098-T

Faculty Online Credential System

[VT Alerts | Hokie PLUS | Hokie Team | Hokie Spa | Timetable of Classes | Undergraduate Admissions | Graduate Admissions | University Account Information | Faculty Online Credential System]

3. Scroll to the bottom of the screen and click on **Performance Planning and Evaluation Tool**.

Virginia Tech Information System

Hokie Plus Hokie Team Hokie Spa

Search Go MAIN MENU SITE MAP HELP EXIT

Hokie TEAM (Tech Employee Access Menu)

Benefits and Deductions
View your retirement plans, Health insurance information, miscellaneous deductions.

Most Recent Pay Stub
Displays your most recent pay stub or the pay stub selection page if you have more than one paycheck in the most recent pay period.

Pay Information
View your Payroll Direct Deposit breakdown; View your Earnings and Deductions History; View your Pay Stubs; Change your Pay Stub Selection

Graduate Students on an Assistantship: Enroll in Payroll Deduction
Allows graduate students on an assistantship to enroll in payroll deduction for payment of their comprehensive fee, technology fee and capital fee (if applicable).

Tax Forms
View and update your W-4 and VA-4 information; View your W-2 Form and/or 1042S Form (if applicable).

Current and Past Jobs
View current and past jobs.

Leave Balances
View your leave balances.

Direct Deposit
Update your Direct Deposit bank information. Payroll, Student Refunds and other University reimbursements can be automatically deposited into your bank account.

Veterans Classification
Attention Veterans - please update your discharge date and Veteran Classifications

Update Ethnicity and Race
View and update your ethnicity and race information.

Labor Redistribution
Initiate and approve retroactive employee payroll funding changes.

Performance Planning and Evaluation Tool

Performance Planning and Evaluation Tool

4. On the Performance Main Menu, click on **Performance Plan Menu**.

Virginia Tech Information System

Hokie Plus Hokie Team Hokie Spa

Search Go BACK SITE MAP HELP EXIT

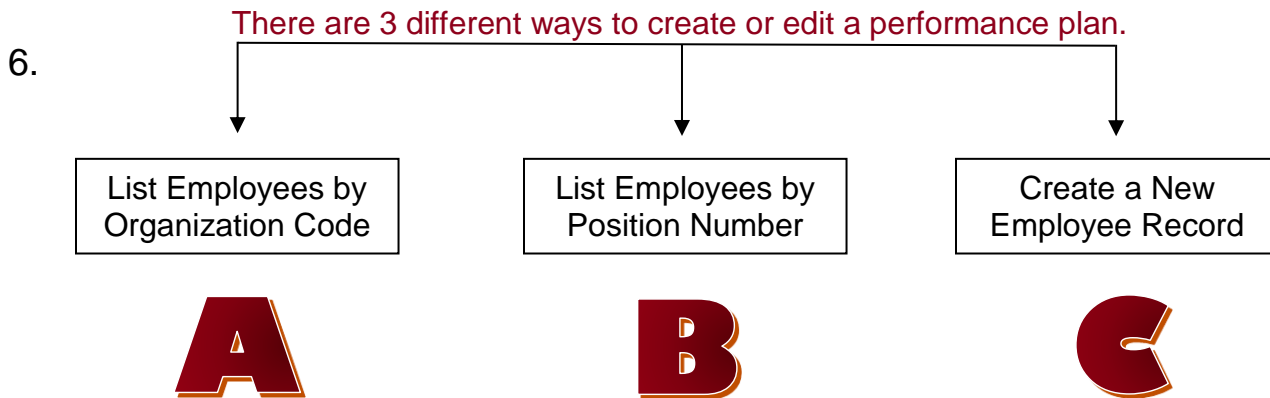
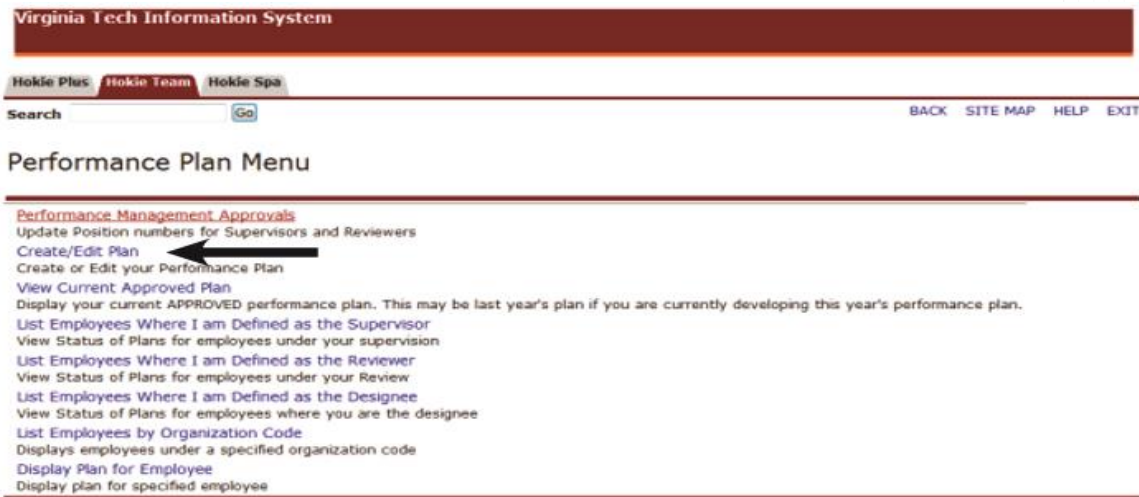
Performance Main Menu

Performance Plan Menu
Create or Edit a Performance Plan

Performance Evaluation Menu
Create or Edit a Performance Evaluation

Update Plan and Evaluation Status
Update Plan and Evaluation Status

5. Click on **Create/Edit Plan**.



You will need to check with your supervisor to determine how your performance plan will be entered in the system. If your supervisor creates your performance plan, you may receive an email asking you for review and input.

Please Note: Last year's evaluation must be approved/accepted online by the employee before you can create this year's plan.

If your supervisor has already created your plan and it has been approved by your supervisor or by a reviewer, please skip to the Performance Plan Acknowledgment of Receipt section on page 8.

A

Copy Last Year's Performance Plan

- Click on the **Copy to Next Plan Year** Button at the bottom of the screen.

Copy to Next Plan Year

B

Create a New Performance Plan

If a performance plan has not been entered you will see the Main Goals Page and you may start entering your goals.

Performance Plan

Main Goals Page

Personal Data:		Employee Name:	
Employee ID:	999999919	Employee Name:	Pebbles Flintstone
Position Number:	PBT019	Job Title:	Lab & Research Spec I
Dept./Org.:	Dino Organization	Supervisor:	None
Review Year:	2012		

You must enter at least 1 goal, but no more than 5 goals.

Performance Plan:

Performance Goals and/or Job Responsibilities:

[Create a New Goal](#) Click "Create a New Goal" to add a new goal.

[Continue to Competencies](#) [View Performance Plan](#)

C

View/Edit a Performance Plan Created by a Supervisor

You will see the performance plan that has been created by your supervisor. During this time, you may modify your plan and send it back to the supervisor to review.

Performance Plan

Main Goals Page

Personal Data:		Employee Name:	
Employee ID:	PBT000010	Employee Name:	Virginia Ann O'Hara
Position Number:	PBT010	Job Title:	IT Specialist
Dept./Org.:	Dino Organization	Supervisor:	Scooby D Doo
Review Year:	2012		

You must enter at least 1 goal, but no more than 5 goals.

Performance Plan:

Performance Goals and/or Job Responsibilities:

[Goal: 1](#) Implement new technology to allow for mail sorting to occur before 9:00am

[Create a New Goal](#) Click "Create a New Goal" to add a new goal.

[Continue to Competencies](#) [View Performance Plan](#)

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Create/Edit Goals

Hint: When creating goals, use **S.M.A.R.T.**

S	M	A	R	T
Specific	Measurable	Attainable	Realistic	Time-bound
Do: Set real numbers with real deadlines. Don't: Say, "I want more visitors."	Do: Make sure your goal is trackable. Don't: Hide behind buzzwords like, "brand engagement," or, "social influence."	Do: Work towards a goal that is challenging, but possible. Don't: Try to take over the world in one night.	Do: Be honest with yourself- you know what you and your team are capable of. Don't: Forget any hurdles you may have to overcome.	Do: Give yourself a deadline. Don't: Keep pushing towards a goal you might hit, "some day."

- Click on the **Create a New Goal** button to enter a new goal or the **Goal** radio button to edit a goal.

Performance Plan

Main Goals Page

Personal Data:
Employee ID: PBT000010
Employee Name: Virginia Ann O'Hara
Position Number: PBT010
Job Title: IT Specialist
Dept./Org.: Dino Organization
Supervisor: Scooby D Doo
Review Year: 2012

You must enter at least 1 goal, but no more than 5 goals.

Performance Plan:
Performance Goals and/or Job Responsibilities:
Goal 1: Implement new technology to allow for mail sorting to occur before 9:00am

Click "Create a New Goal" to add a new goal.

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- Enter/view the goal information and metrics.
- When finished, click on **Save**, then click **Save and continue to next Goal** or **Continue to Competencies**.

Goal Entry Page

Personal Data:
Employee ID: PBT000010
Employee Name: Virginia Ann O'Hara

Performance Goals and/or Job Responsibilities:
Goal 1: Implement new technology to allow for mail sorting to occur before 9:00am

Metrics:
Metric 1: Project is complete no later than July 2012
Metric 2: Periodic checks post system implementation show mail is sorted before 9:00am 95% of the time
Metric 3: Employee informs manager of any potential issues that could cause a delayed implementation date as soon as the issue is known
Metric 4:
Metric 5:

Create/Edit Competencies

Universal competencies have been predefined for all staff employees. If they are a supervisor, you will see pre-defined competencies. These cannot be changed.

For the job specific competencies, you can click on the name of each one to see the description and performance measure.

10. Choose the competencies by selecting the check box beside the competency name.
Select between 3 and 5 competencies.

11. When finished, click on **Save**, then click on **Continue to Career Development**.

Please Note: If there are more than 5 competencies, then the comments field at the bottom of the section should be used. It is important to remember that between 3 and 5 competencies are considered the optimal number. As you add more and more competencies, it is difficult to really strive for excellence.

Create/Edit Career Development

12. Create or edit information under the *Item Employee is responsible for* section.
13. When finished, click **Save**, then click on **View Performance Plan**. This will save the changes.
14. After the performance plan has been completed, please click on the **View in PDF** link to save or print a copy of the plan.

Universal Competencies:

- Teamwork: ☐ Select
- Maintaining a Safe & Secure Work Environment: ☐ Select
- Diversity Commitment: ☐ Select
- Job Specific Competencies:
- Adaptability & Flexibility: ☐ Select
- Analytical Skills & Problem Solving: ☐ Select
- Communication Skills: ☐ Select
- Compliance/Quality of Service: ☐ Select
- Creativity and Innovation: ☐ Select
- Customer Service Orientation: ☐ Select
- Initiative: ☐ Select
- Interpersonal Skills: ☐ Select
- Job Knowledge & Technical Competence: ☐ Select
- Mission, Business & Strategic Plan: ☐ Select
- Time Management: ☐ Select
- Work Habits: ☐ Select
- Results Orientation: ☐ Select

Competencies description and performance measures:

Teamwork: Implies the intention to work cooperatively with others, to be a part of a team, to work together, as opposed to working separately or competitively. Teamwork may only be considered when the subject is a member of a group of people functioning as a team, generally where he or she is not the leader. "Team" is broadly defined as any task or process-oriented group of individuals.

Model Performance: Offers ideas for improvement; contributes to group work; efforts are well received and normally result in process improvements and productivity. Consistently volunteers to help others within work group as work schedule permits. Contributes positively to resolution of conflict or problem encountered.

Strong Performance: Contributes meaningfully to work group efforts by offering new ideas for improvement, sharing knowledge and otherwise demonstrating a cooperative manner in dealing with supervisors and coworkers. Does his or her part toward group efforts.

Developing Performance: Is making a conscious effort to become a team player. On a more frequent basis, is sharing job knowledge and ideas in an effort to improve overall group performance.

Unacceptable Performance: Shows little or no interest in group efforts. Rarely demonstrates active participation in group interaction. Not perceived as a team player.

Comments:

Save
Continue to Career Development
Back to Main Goals Page
View Performance Plan
Exit Without Saving

Career Development

Personal Data:

Employee ID: PBT000010 Employee Name: Virginia Ann O'Hara
Position Number: PBT010 Job Title: IT Specialist
Dept./Org.: Dino Organization Supervisor: Scooby D Doo
Review Year: 2012

Career Development Plan:

Item Employee is responsible for:

1. Participate in classes offered through Microsoft IT Academy
- 2.
- 3.

Item Supervisor is responsible for:

1. Reserve money to pay for classes and career development
- 2.
- 3.

Save
Back to Main Goals Page
Back to Competencies
View Performance Plan
Exit Without Saving

Performance Plan

[View in PDF](#)

Final Version of Performance Plan

Personal Data:

Employee ID: PBT000010 Employee Name: Virginia Ann O'Hara
Position Number: PBT010 Job Title: IT Specialist
Dept./Org.: Dino Organization Supervisor: Scooby D Doo
Review Year: 2012

Rating Definitions for Goals/Responsibilities

Model Performance	Strong Performance	Developing Performance	Unacceptable Performance
Outstanding Performance that considerably and consistently exceeds expectations.	Good, solid performance. Fully meets expectations and may, on occasion, exceed expectations in this area.	May partially meet performance expectations but needs improvement. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.	Performance is well below an acceptable level in this area. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.

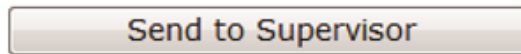
Printing/Saving Performance Plan

When viewing the performance plan as a .pdf file using Adobe Acrobat Reader or any other type of PDF reader, you can use the **Save** and **Print** buttons in the PDF toolbar to save a copy onto your computer or print it if you have a printer accessible.



Send to Supervisor

15. Review the performance plan and, if needed, you can go back to any section to make changes. When the performance plan is ready to be submitted, click on the **Send to Supervisor** button at the bottom of the screen.



Next Steps

The supervisor will review the performance plan. Once you and your supervisor are satisfied with the performance plan, the supervisor has the option to forward the plan to a reviewer. Either the supervisor or reviewer will finalize the plan.

You will receive an email that will contain the following information after it has been approved:

[Dear {name}, {Supervisor or Reviewer Name} has reviewed and approved your {year} performance plan and has sent it to you for review and acknowledgement of receipt.]

ACTION REQUIRED:

- Logon to the performance management tool via HOKIESPA and select Performance Plan Menu.
- Select **"Create/Edit Plan"**.
- Scroll to the bottom of the plan and select **"I have received and reviewed by performance plan"**.

If there are any questions or if you require assistance with the performance management tool, please contact University Employee Relations: Rodney Irvin (540-231-5303), Vickie Mitchell (540-231-2850), or Tina Kapalin (540-231-4272).

Performance Plan Acknowledgment of Receipt

After a supervisor or reviewer has finalized the performance plan, you will need to view your plan, then acknowledge that you have received it.

1. Navigate to <https://login.vt.edu/profile/cas/login?execution=e1s1> and log in with your username and password.
2. Click on **Hokie Team**.
3. Click on **Performance Planning and Evaluation Tool**.
4. Click on **Performance Plan Menu**.
5. From the Performance Plan menu select **Create/Edit Plan** or **View Current Approved Plan**.
6. Review the plan, then click on **I have received and reviewed my performance plan** button at the bottom of the screen.

Virginia Tech Information System

Hokie Plus Hokie Team Hokie Spa

Search [BACK](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Performance Plan Menu

- Create/Edit Plan
- Create or Edit your Performance Plan
- View Current Approved Plan
- Display your current APP/VED performance plan. This may be last year's plan if you are currently developing this year's performance plan.
- List Employees Where I am Defined as the Supervisor
- View Status of Plans for employees under your supervision
- List Employees Where I am Defined as the Reviewer
- View Status of Plans for employees under your Review
- List Employees Where I am Defined as the Designee
- View Status of Plans for employees where you are the designee
- Display Plan for Employee
- Display plan for specified employee

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Model Performance	Strong Performance	Developing Performance	Unacceptable Performance
Always ensures that most important projects/tasks receive primary consideration. Is always on-task and working towards completing important job responsibilities. Rarely misses a deadline.	Consistently prioritizes projects/task effectively by allocating time appropriately. Consistently meets deadlines.	Has demonstrated ability to prioritize projects/task effectively, but lacks consistency in doing so. Usually meets deadlines, but could improve in doing so.	Consistently fails to meet deadlines. Unable to prioritize effectively and appear unable to allocate time appropriately.

Comments (optional):

Career Development Plan:

Item Employee is responsible for:	Item Supervisor is responsible for:
<input type="checkbox"/> Participate in classes offered through Microsoft IT Academy	<input type="checkbox"/> Reserve money to pay for classes and career development

Creating Your Self-Evaluation

The purpose of an evaluation is to document how well an employee has met the expectations defined in the performance plan. During this process, the employee has an opportunity to perform a self-evaluation.

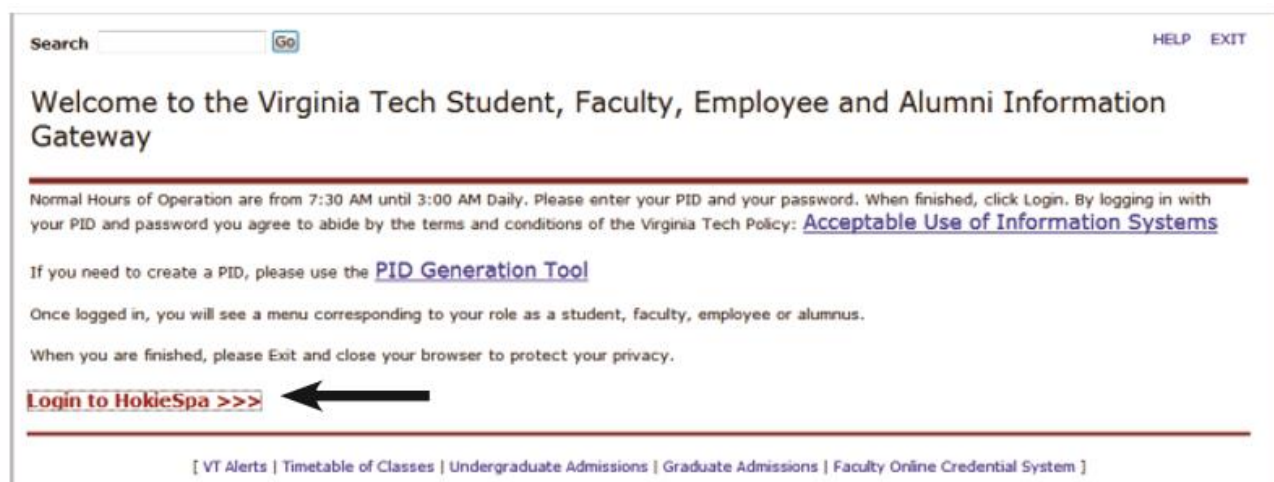
When completing the self-evaluation, the employee should have the following items to help perform this task:

- ✓ Updated job description
- ✓ Copy of the approved performance plan
- ✓ Any other relevant documentation

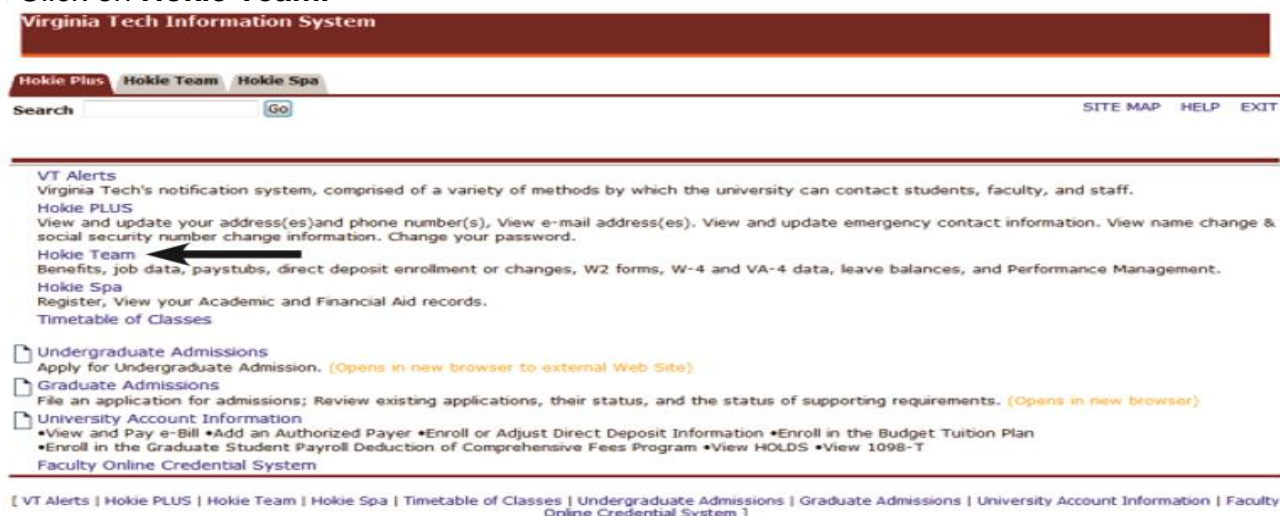
The self-evaluation is used to document accomplishments as related to each performance goal/job responsibility and competency. It additionally allows an employee to summarize career development activities.

1. Navigate to <https://login.vt.edu/profile/cas/login?execution=e1s1> and click on **Login to HokieSpa**. On the next screen log in with your PID and password.

Please Note: The system will time out after 30 minutes of inactivity so please save periodically.



2. Click on **Hokie Team**.



3. Scroll to the bottom of the screen and click on **Performance Planning and Evaluation Tool**.

Virginia Tech Information System

Hokie Plus Hokie Team Hokie Spa

Search Go MAIN MENU SITE MAP HELP EXIT

Hokie TEAM (Tech Employee Access Menu)

Benefits and Deductions
View your retirement plans, Health insurance information, miscellaneous deductions.

Most Recent Pay Stub
Displays your most recent pay stub or the pay stub selection page if you have more than one paycheck in the most recent pay period.

Pay Information
View your Payroll Direct Deposit breakdown; View your Earnings and Deductions History; View your Pay Stubs; Change your Pay Stub Selection

Graduate Students on an Assistantship: Enroll in Payroll Deduction
Allows graduate students on an assistantship to enroll in payroll deduction for payment of their comprehensive fee, technology fee and capital fee (if applicable).

Tax Forms
View and update your W-4 and VA-4 information; View your W-2 Form and/or 1042S Form (if applicable).

Current and Past Jobs
View current and past jobs.

Leave Balances
View your leave balances.

Direct Deposit
Update your Direct Deposit bank information. Payroll, Student Refunds and other University reimbursements can be automatically deposited into your bank account.

Veterans Classification
Attention Veterans - please update your discharge date and Veteran Classifications

Update Ethnicity and Race
View and update your ethnicity and race information.

Labor Redistribution
Initiate and approve retroactive employee payroll funding changes.

Performance Planning and Evaluation Tool ←

Performance Planning and Evaluation Tool

4. On the Performance Main Menu, click on **Performance Evaluation Menu**.

Virginia Tech Information System

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Search Go BACK SITE MAP HELP EXIT

Performance Main Menu

Performance Plan Menu
Create or Edit a Performance Plan

Performance Evaluation Menu ←
Create or Edit a Performance Evaluation

Update Plan and Evaluation Status
Update Plan and Evaluation Status

5. Click on **Create/Edit Self-Evaluation**.

Virginia Tech Information System

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Search Go BACK SITE MAP HELP EXIT

Performance Evaluation Menu

Create/Edit Self Evaluation ←
Create or Edit your Performance Evaluation

View Current Approved Evaluation
Display your current approved performance evaluation

List Employees Where I am Defined as the Supervisor
View status of evaluations for employees under your supervision

List Employees Where I am Defined as the Reviewer
View status of evaluations for employees under your review

List Employees by Organization Code
Displays employees under a specified organization code

Display Evaluation for Employee
Display evaluation for specified employee

List Employees Where I am Defined as the Designee
View status of evaluations for employees where you are listed as the designee

Evaluation History
View the history of the evaluations

You will see your approved performance plan in which you may rate yourself on each goal/job responsibility and competency. You are required to comment on each goal, but not rate yourself.

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[VIEW HTML PDF](#)

Employee Evaluation

Personal Data

Employee ID:	PBT000010	Employee Name:	Virginia Ann O'Hara
Position Number:	PBT010	Job Title:	IT Specialist
Dept./Org.:	Dino Organization	Supervisor:	Scooby D Doo
Review Year:	2012		

Rating Definitions for Goals/Responsibilities

Model Performance Outstanding Performance that considerably and consistently exceeds expectations.	Strong Performance Good, solid performance. Fully meets expectations and may, on occasion, exceed expectations in this area.	Developing Performance May partially meet performance expectations but needs improvement. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.	Unacceptable Performance Performance is well below an acceptable level in this area. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.
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Performance Goals and/or Job Responsibilities

Performance Goals and/or Job Responsibilities	Actual Results and Accomplishments	Ratings
<p>Identify 1-4 goals and/or primary job responsibilities.</p> <p>Goal/Job Responsibility: Implement new technology to allow for mail sorting to occur before 9:00am</p> <p>Metrics: 1) Project is completed no later than July 2012 2) Periodic checks post system implementation show mail is sorted before 9:00am 95% of the time 3) Employee informs manager of any potential issues that could cause a delayed implementation date as soon as the issue is known</p>	<p>Evaluate results against mutually established performance goals and job responsibilities.</p>	<p>Select on ratings for each performance goal or job responsibility.</p> <p> <input type="radio"/> Model Performance <input type="radio"/> Strong Performance <input type="radio"/> Developing Performance <input type="radio"/> Unacceptable Performance </p>

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Enter Results and Accomplishments

- Enter results and accomplishments for each assigned goal/job responsibility, then select a rating.

For each goal/job responsibility, describe in the comment field under Actual Results and Accomplishments how you have performed against the goal and metrics. Then, select the appropriate rating, the comments should provide justification for the rating that is selected.

Rating Definitions for Goals/Responsibilities

Model Performance Outstanding Performance that considerably and consistently exceeds expectations.	Strong Performance Good, solid performance. Fully meets expectations and may, on occasion, exceed expectations in this area.	Developing Performance May partially meet performance expectations but needs improvement. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.	Unacceptable Performance Performance is well below an acceptable level in this area. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.
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Performance Goals and/or Job Responsibilities

Performance Goals and/or Job Responsibilities	Actual Results and Accomplishments	Ratings
<p>Identify 1-4 goals and/or primary job responsibilities.</p> <p>Goal/Job Responsibility: Implement new technology to allow for mail sorting to occur before 9:00am</p> <p>Metrics: 1) Project is completed no later than July 2012 2) Periodic checks post system implementation show mail is sorted before 9:00am 95% of the time 3) Employee informs manager of any potential issues that could cause a delayed implementation date as soon as the issue is known</p>	<p>Evaluate results against mutually established performance goals and job responsibilities.</p> <p>The project was completed by June 2012 and implemented a post check system. It took about a month to sort out the problems that began once the system was in use but he mail has been sorted 97% of time since implementation.</p>	<p>Select on ratings for each performance goal or job responsibility.</p> <p> <input type="radio"/> Model Performance <input checked="" type="radio"/> Strong Performance <input type="radio"/> Developing Performance <input type="radio"/> Unacceptable Performance </p>

Listed below is the description for each rating:

- **Model Performance** - Outstanding Performance that considerably and consistently exceeds expectations.
- **Strong Performance** - Good, solid performance. Fully meets expectations and may, on occasion, exceed expectations in this area.
- **Developing Performance** - May partially meet performance expectations but needs improvement. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.
- **Unacceptable Performance** - Performance is well below an acceptable level in this area. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.

7. Click on **Save**, then click on **Continue to Next Goal** or **Continue to Competencies**.

Select Competency Ratings

Competencies describe the behavior that employees are expected to demonstrate when they are successfully performing their jobs. You will see a list of universal and job specific competencies. Universal competencies are pre-defined for all staff employees. If you are a supervisor, you will see a list of pre-defined competencies.

8. Select a rating for each competency.

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[View in PDF](#)

Employee Evaluation

Personal Data			
Employee ID:	PBT000010	Employee Name:	Virgina Ann O'Hara
Position Number:	PBT010	Job Title:	IT Specialist
Dept./Org.:	Dino Organization	Supervisor:	Scooby D Doo
Review Year:	2012		

Universal Competencies:

Teamwork: Implies the intention to work cooperatively with others, to be a part of a team, to work together, as opposed to working separately or competitively. Teamwork may only be considered when the subject is a member of a group of people functioning as a team, generally where he or she is not the leader. "Team" is broadly defined as any task or process-oriented group of individuals.

☐ [Model Performance](#) ☐ [Strong Performance](#) ☐ [Developing Performance](#) ☐ [Unacceptable Performance](#)

Maintaining a Safe & Secure Work Environment: University Policy 5800, Health and Safety Policy, was issued in January 2001. The policy states, "At Virginia Tech, safety is everyone's responsibility. All members of the university community are expected to be thoroughly familiar with their safety responsibilities, strive to follow safety practices at all times, act proactively to prevent accidents and injuries, communicate hazards to supervisors, and be prepared for emergencies that may occur in the workplace."

☐ [Model Performance](#) ☐ [Strong Performance](#) ☐ [Developing Performance](#) ☐ [Unacceptable Performance](#)

Diversity Commitment: the ability to understand and value the practices, customs, values and norms of other individuals, groups and cultures. It goes beyond what is required by state and federal equal employment opportunity (EEO) regulations to include the ability to value different points-of-view and recognize the improved outcomes that occur when individuals from different backgrounds or perspectives interact. It includes seeing others' differences as a positive part of the organization. It also means being able to work well with a wide variety of people representing different backgrounds, cultures and socio-economic levels.

☐ [Model Performance](#) ☐ [Strong Performance](#) ☐ [Developing Performance](#) ☐ [Unacceptable Performance](#)

Job Specific Competencies:

Analytical Skills & Problem Solving: Analytical Skills and Problem Solving is understanding a situation, issue, problem, etc., by breaking it into smaller pieces, or tracing the implications of a situation in a step-by-step way. Analytical Skills and Problem Solving includes organizing the parts of a problem, situation, etc., in a systematic way; making systematic comparisons of different features or aspects; setting priorities on a rational basis; and identifying time sequences, causal relationships, or if-then relationships.

☐ [Model Performance](#) ☐ [Strong Performance](#) ☐ [Developing Performance](#) ☐ [Unacceptable Performance](#)

Listed below is the description for each rating:

- **Model Performance** - Outstanding Performance that considerably and consistently exceeds expectations.
- **Strong Performance** - Good, solid performance. Fully meets expectations and may, on occasion, exceed expectations in this area.
- **Developing Performance** - May partially meet performance expectations but needs improvement. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.
- **Unacceptable Performance** - Performance is well below an acceptable level in this area. Steps to improve performance in this area must be clearly detailed in the Career Development Plan section.

9. When finished, click on **Save**, then click on **Continue to Overall Rating and Comments**.

Select Overall Rating

The final step in the self-evaluation is to give an overall rating and enter final comments in regards to the self-evaluation.

10. Select an overall rating and enter any comments that relate to the self-evaluation.



*** Overall Rating ***

☐ Model Performance ☐ Strong Performance ☐ Developing Performance ☐ Unacceptable Performance

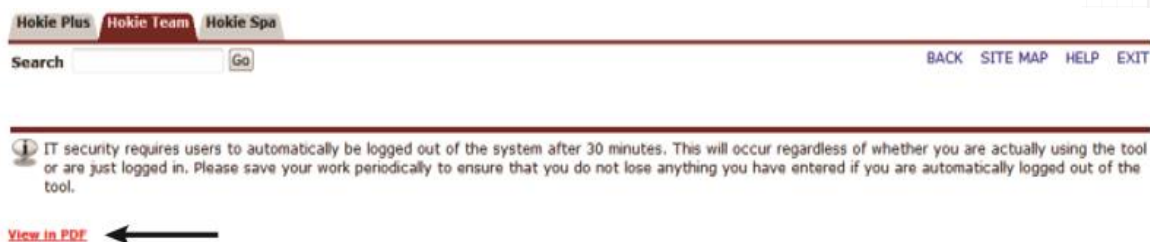
Employee Comments (optional):

Listed below is the description for each rating:

- **Model Performance** - Outstanding performance that results in extraordinary and exceptional accomplishments with significant contributions to goals of the organization, department and/or senior management area.
- **Strong Performance** - Good, solid performance. Fulfills all position requirements and goals and may, on occasion, generate results above those expected of the position.
- **Developing Performance** - Performance leaves room for improvement. Employee requires either additional development in deficient technical areas; or, may be a new hire requiring additional training; or, is not responding favorably to coaching for performance improvement.
- **Unacceptable Performance** - Performance is well below the minimum position requirements. Requires immediate review and action including implementation of Performance Improvement Plan (PIP).

11. When finished, click on **Save**, then click on **View Entire Evaluation**.

12. After the self-evaluation has been completed, please click on **View in PDF** to save or print a copy of the self-evaluation.



Printing/Saving Performance Evaluation

When viewing the self-evaluation as a .pdf file using Adobe Acrobat Reader or any other type of PDF reader, you can use the **Save** and **Print** buttons in the PDF toolbar to save a copy onto your computer or print it if you have a printer accessible.



Send to Supervisor

13. Review the self-evaluation. You are welcome to go back to any section to make changes. When you are satisfied, click **Send to Supervisor**.

A screenshot of the self-evaluation form. The form is titled 'Performance Evaluation' and contains several sections for rating and commenting. The sections include: 'Performance Evaluation', 'Competencies', 'Goals', 'Comments', and 'Overall Rating'. Each section has a table with columns for 'Rating' and 'Comments'. The 'Overall Rating' section has a dropdown menu for selecting a rating. The form is designed to be filled out by the employee and then reviewed by the supervisor.

Exit without Saving

Exit without Saving and return to main menu.

Back to Goals

Modify items in the goals section.

Back to Competencies

Modify the overall rating and comments section.

Back to Overall Rating and Comments

Modify items in the competencies section.

Send to Supervisor

Send the finalized self-evaluation to the supervisor.

Next Steps

The supervisor will receive the self-evaluation and may use it to create your performance evaluation. The performance evaluation will go through an approval process. Afterwards, your supervisor will schedule a private meeting to review it with you.

You will receive an email with the following information:

Dear {employee name}, your completed performance evaluation is now available to you in the performance management tool. You should be hearing from your supervisor to arrange a time to discuss your evaluation if they have not already contacted you.

ACTION REQUIRED:

- *Logon to the performance management tool via HOKIESPA and select Performance Plan Menu.*
- *Select “**View Current Approved Evaluation**”.*
- *Scroll to the bottom of the plan and select “**I have received and reviewed my performance evaluation**”*

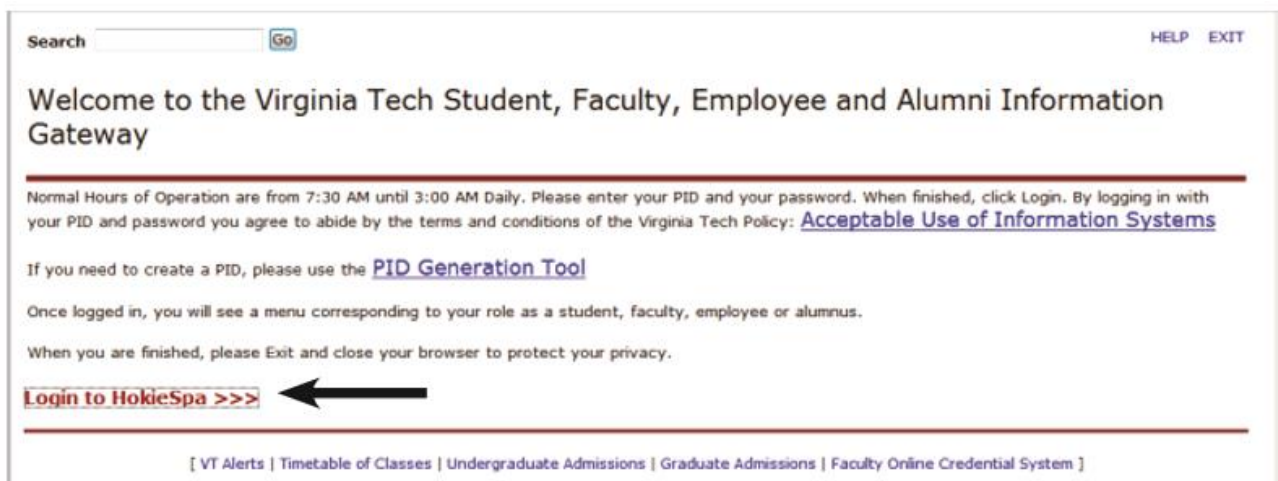
If there are any questions or if you require assistance with the performance management tool, please contact University Employee Relations: Rodney Irvin (540-231-5303), Vickie Mitchell (540-231-2850), or Tina Kapalin (540-231-4272).

Performance Evaluation Acknowledgement of Receipt

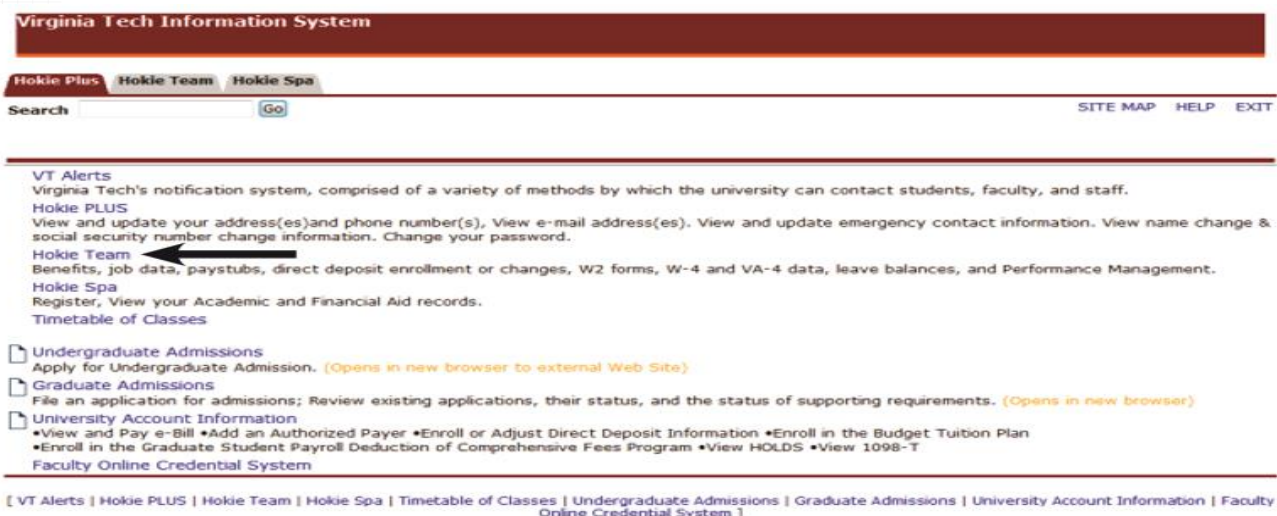
After meeting with the supervisor to go over the performance evaluation, he/she may release the evaluation for electronic signature by the employee. If for some reason you are unable to log into HokieSPA, or cannot access a computer, there is an option to collect an alternate signature. If the alternate signature is obtained, a paper copy of the form should be printed, signed and sent to the Human Resources' office.

1. Navigate to <https://login.vt.edu/profile/cas/login?execution=e1s1> and click on **Login to HokieSpa**. On the next screen log in with your PID and password.

Please Note: The system will time out after 30 minutes of inactivity so please save periodically.



2. Click on **Hokie Team**.



3. Scroll to the bottom of the screen and click on **Performance Planning and Evaluation Tool**.



Virginia Tech Information System

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Search

MAIN MENU SITE MAP HELP EXIT

Hokie TEAM (Tech Employee Access Menu)

- Benefits and Deductions
View your retirement plans, Health insurance information, miscellaneous deductions.
- Most Recent Pay Stub
Displays your most recent pay stub or the pay stub selection page if you have more than one paycheck in the most recent pay period.
- Pay Information
View your Payroll Direct Deposit breakdown; View your Earnings and Deductions History; View your Pay Stubs; Change your Pay Stub Selection
- Graduate Students on an Assistantship: Enroll in Payroll Deduction
Allows graduate students on an assistantship to enroll in payroll deduction for payment of their comprehensive fee, technology fee and capital fee (if applicable).
- Tax Forms
View and update your W-4 and VA-4 information; View your W-2 Form and/or 1042S Form (if applicable).
- Current and Past Jobs
View current and past jobs.
- Leave Balances
View your leave balances.
-  Direct Deposit
Update your Direct Deposit bank information. Payroll, Student Refunds and other University reimbursements can be automatically deposited into your bank account.
- Veterans Classification
Attention Veterans - please update your discharge date and Veteran Classifications
- Update Ethnicity and Race
View and update your ethnicity and race information.
- Labor Redistribution
Initiate and approve retroactive employee payroll funding changes.
- Performance Planning and Evaluation Tool** 
- Performance Planning and Evaluation Tool

4. On the Performance Main Menu, click on **Performance Evaluation Menu**.

Virginia Tech Information System

Hokie Plus Hokie Team Hokie Spa

Search

[BACK](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Performance Main Menu

- Performance Plan Menu
Create or Edit a Performance Plan
- Performance Evaluation Menu** 
- Create or Edit a Performance Evaluation
- Update Plan and Evaluation Status
- Update Plan and Evaluation Status

5. Click on View Current Approved Evaluation.

Virginia Tech Information System

Hokie Plus Hokie Team Hokie Spa

Search

[BACK](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Performance Evaluation Menu

- Create/Edit Self Evaluation
- Create or Edit your Performance Evaluation
- View Current Approved Evaluation
Display your current approved performance evaluation
- List Employees Where I am Defined as the Supervisor
View status of evaluations for employees under your supervision
- List Employees Where I am Defined as the Reviewer
View status of evaluations for employees under your review
- Display Evaluation for Employee
Display evaluation for specified employee
- List Employees Where I am Defined as the Designee
View status of evaluations for employees whom you are listed as the designee
- Evaluation History
View the history of the evaluations

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6. Review the evaluation, then click on **I have received and reviewed my evaluation** button at bottom of the screen.

I have received and reviewed my Evaluation

This completes the performance plan cycle! The supervisor should be meeting with the employee to work on next year's performance plan within 30 days of receiving the performance evaluation.

Performance Plan Status Definitions

Performance Plan Status	Definition
No Plan Exists	A performance plan for the current review period has not been started by the employee or the supervisor. If the supervisor does not require a draft plan from their employee(s), they may create a performance plan.
Employee Editing	Employee is editing the plan and neither the supervisor or reviewer will be able to access the plan until the employee sends it to the supervisor.
Supervisor Created Plan	Supervisor has created a performance plan.
Employee Complete	Employee has completed a performance plan prior to the supervisor and sent it to the supervisor for their review or the employee has returned the performance plan that the supervisor sent them to edit.
Copied from Previous Year	The performance plan was copied from the previous year's performance plan.
Copied from Employee	The performance plan was copied from the employee's draft of the plan.
New Version Created	An existing approved plan has been copied and created into a new version that can be updated. This is for the same performance review period. This is not used when a plan from last year was used to create the plan for the current review period.
Supervisor Editing	Supervisor is editing the plan and neither the employee or reviewer will be able to access the plan until the supervisor sends it on.
Employee Reviewing	The supervisor has sent the performance plan to the employee for input. The employee will be able to edit the plan before returning to the supervisor.
Supervisor Approved	The supervisor has sent the performance plan to the employee as a final for review; the employee will not be able to edit. The employee should review and acknowledge receipt.
Reviewer Reviewing	The supervisor has sent the performance plan to the reviewer to examine.
Reviewer Approved	The reviewer has sent the performance plan to the employee for review.
Employee Approved	The employee has reviewed their performance plan and selected the "I have received and reviewed my performance plan" option.
Employee Reviewed and Approved a Paper Copy	The supervisor has selected "Enter Alternative Signoff" on the "List of Employees Where I am defined as the Supervisor" screen and selected the "Employee reviewed and approved a paper copy" option.
Employee Refused to Sign a Paper Copy	The supervisor has selected "Enter Alternative Signoff" on the "List of Employees Where I am defined as the Supervisor" screen and selected the "Employee refused to sign a paper copy" option.

Performance Evaluation Status Definitions

Performance Evaluation Status	Definition
No Evaluation Exists	A performance evaluation for the current review period has not been started by the employee or supervisor. If the employee chooses not to do a self-evaluation, the supervisor may begin the performance evaluation.
Employee Editing Self-Evaluation	Employee has created their self-evaluation and is still in process.
Supervisor Created Evaluation	The supervisor has started an evaluation for the employee. The employee will not be able to enter a self-evaluation into the online system until the supervisor has started their evaluation.
Supervisor Editing	The supervisor is editing the performance evaluation.
Evaluation Sent to Reviewer	The supervisor has completed the evaluation and sent it to the reviewer.
Evaluation Sent to Budget Authority	If your college/VP area uses a calibration team, this status indicates that the reviewer has reviewed the evaluation and sent it to the calibration team for final approval. The calibration team is typically a group of senior managers from your senior management area.
Budget Authority Approves	The calibration team has approved the evaluation and returned it to the supervisor.
Senior Management Approves	The calibration team has approved the evaluation and returned it to the supervisor.
Supervisor Released to Employee	The supervisor has sent the final evaluation to the employee for their review and will arrange a meeting to discuss the evaluation. The employee should log on and acknowledge approval.
Employee Approved	The employee has logged on and acknowledged evaluation approval.
Employee Reviewed and Approved a Paper Copy	The employee was provided a paper copy that they reviewed and signed.
Employee Refused to Sign a Paper Copy	The employee received a paper copy of the evaluation but declined to sign it.



*North End Center, Suite 2300
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540-231-9331
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