VT | PAGEUP TALENT MANAGEMENT SYSTEM

WARNING:
THIS FUNCTION SHOULD BE USED RARELY ONCE THE PLAN HAS BEGUN FOR SIGNIFICANT UPDATES TO THE PLAN.
MINOR UPDATES CAN BE RECORDED IN THE COMMENTS AND JOURNALS.

🏠 About me ˅   My team ˅   My development ˅   Reports ˅   ⊕ Journal entry   Sarah ˅ ⓘ

This function only works if you are the direct supervisor, or reviewer (1-up manager) in the organizational chart in PageUp.

FIGURE 1.

IF A PERFORMANCE PLAN NEEDS TO BE EDITED

1. Locate the navigation bar at the top of the screen and select "My team" then "Performance reviews" as shown in Figure 1.

2. If you have a number of performance reviews, you can add the employee's last name to search for their review plan as shown in Figure 2. Then select **Search**.
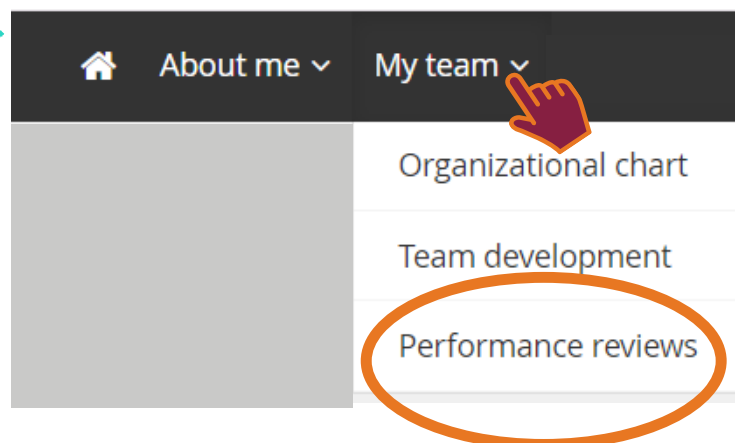
FIGURE 2.

3. Then select the employee's name as shown in Figure 3.

FIGURE 3.

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⊕ Journal entry   Sarah ⌄ ⓘ

ADDITIONAL STEPS FOR EDITING A PERFORMANCE PLAN

4. Then select "Development and performance" and move down to the Performance reviews section, as shown in Figure 4.
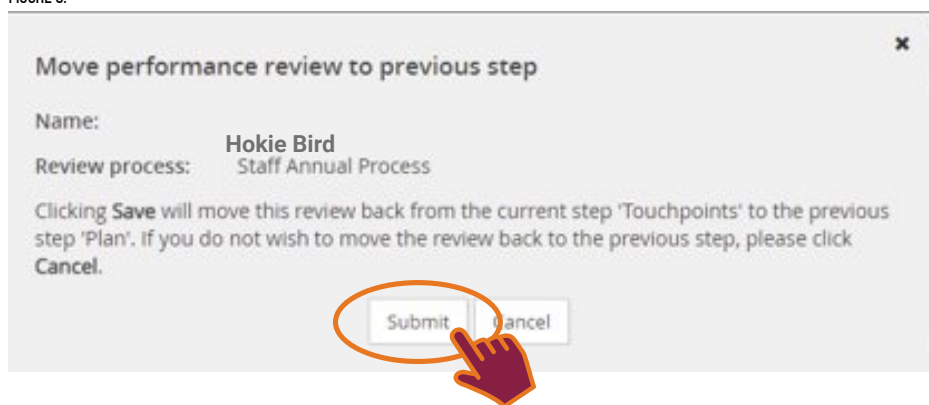
FIGURE 4.

Hokie Bird Employee   ✕

Activity   Profile   Development and performance

Development plan   View development plan

Status   Development activity   Intended completion date   Actual completion date

Performance reviews
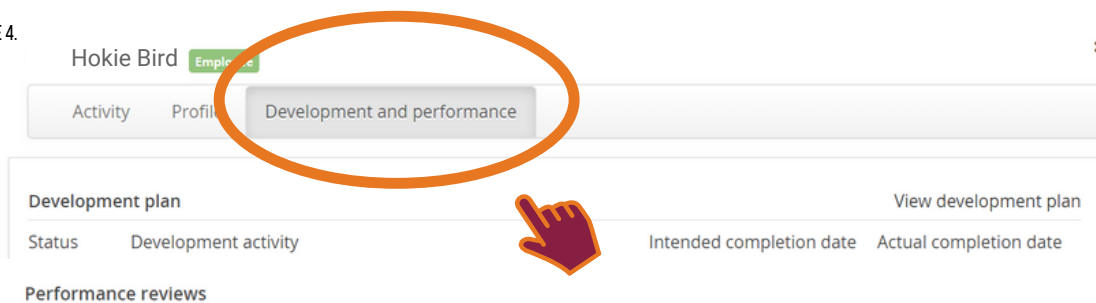
5. Select the Review step as shown in Figure 5.

FIGURE 5.

Performance reviews

Review process	Start date	End date	Review Manager	Review step	Status	
Staff Annual Process	01 Jul 2021	05 Nov 2021		Touchpoints	Current	I want to... ▾

6. Select **Submit** to move the performance review to **Planning** as shown in Figure 6. Depending on where you are in the process, this may mean submitting it twice, such as sending it back from Touchpoints through Planning Approval to Planning, or more than twice.

FIGURE 6.

Move performance review to previous step   ✕

Name:
                    Hokie Bird
Review process: Staff Annual Process

Clicking **Save** will move this review back from the current step 'Touchpoints' to the previous step 'Plan'. If you do not wish to move the review back to the previous step, please click **Cancel**.

Submit   Cancel

7. Make your updates to the content and progress to the approval step. Both the employee and supervisor must approve again to proceed to Touchpoints. Remember to include the reviewer again as needed.

8. It's good practice to document updates in either a comment or a journal entry during Touchpoints to keep track of why this update occurred.

Note:

It is recommended not to change the plan less than 3 months prior to the end of the review cycle as there will not be enough time to evaluate the performance.

Contact Human Resources with any questions.