



## 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.**

Home 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.

## 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 1.

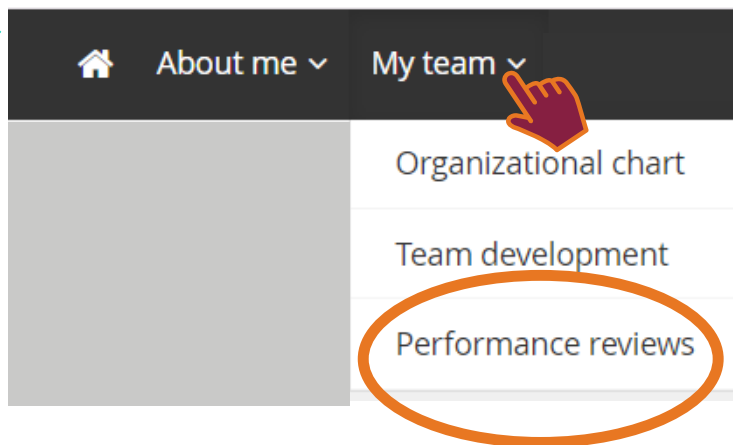


FIGURE 2.

**My team performance reviews**

Employee first name:

Employee last name:

Level:

Status:

Review process step:

Role:

Clear Search

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

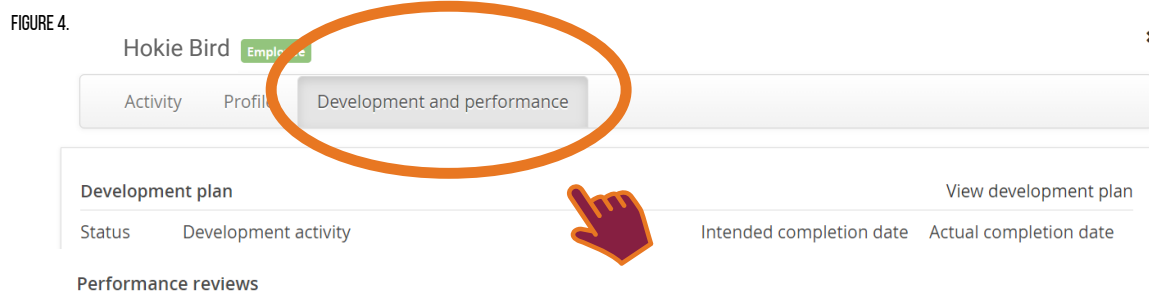
FIGURE 3.

Employee	Review process	Review step	Role	Start date	Due date	
Hokie Bird	Staff Annual Process	Planning	Base Compliance	9 Sep 2021	17 Dec 2021	I want to... <input type="text"/> <a href="#">Open review</a>

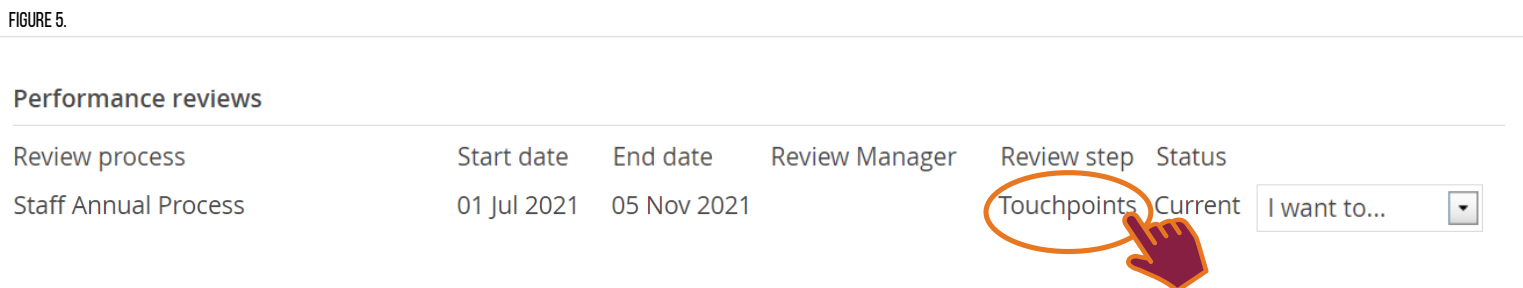


## ADDITIONAL STEPS FOR EDITING A PERFORMANCE PLAN

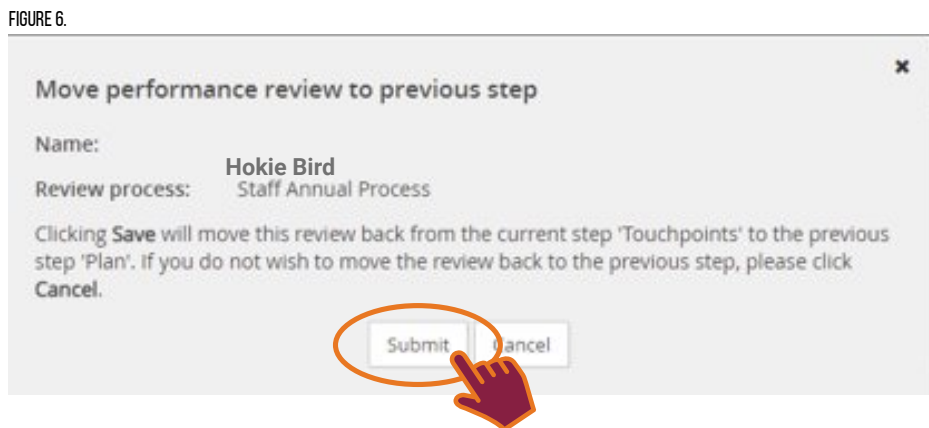
4. Then select "Development and performance" and move down to the Performance reviews section, as shown in Figure 4.



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



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.



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.