



## Performance Management Training

Executive/Administrative/Professional  
Non-Teaching Faculty  
Security Staff Evaluation



## Agenda

Process Overview

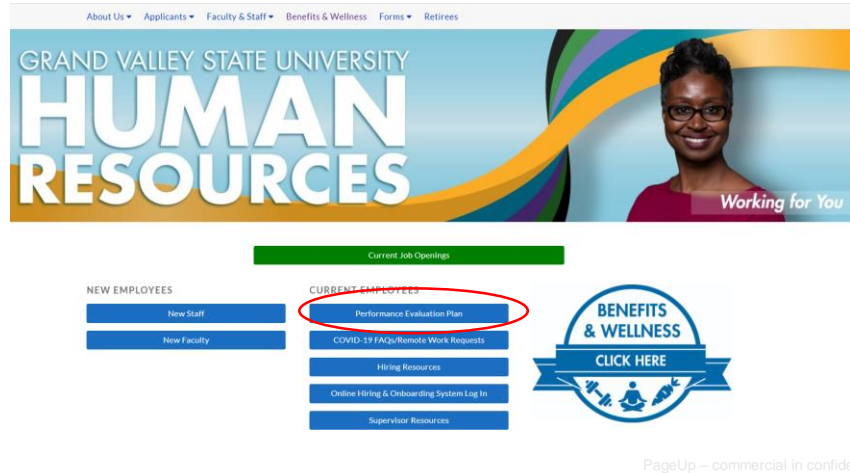
Logging into Performance Management

Navigating

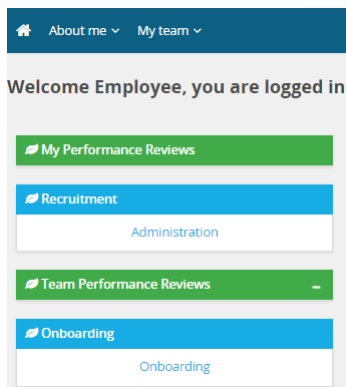
Completing your actions

# How to Access the Supervisor and Employee Performance Portal

Direct link: <https://grandvalleysu.pageuppeople.com/>  
Human Resources website: [www.gvsu.edu/hro](http://www.gvsu.edu/hro)



## Welcome to GVSU Performance



- Employees will use *My Performance Review*
- Supervisors will use *My Performance Review* for your own review and *Team Performance Reviews* to locate your employees

## Admin Prof, Non-Teaching Fac, Sec Staff Evaluation Process Steps

- ✓ Step 1 - Employee Identifies Goals and Job Responsibilities
- ✓ Step 2 - Supervisor Reviews/Approves Goals
- ✓ Step 3 - Evaluation Period
- ✓ Step 4 - Mid Year Check-In
- ✓ Step 5 - Evaluation Period
- ✓ Step 6 - Employee Completes Self Evaluation
- ✓ Step 7 - Supervisor Completes Evaluation
- ✓ Step 8 - Supervisor/Employee Review Discussion
- ✓ Step 9 - Employee Acknowledges Evaluation
- ✓ Step 10 - Supervisor Reviews Final Acknowledgement
- ✓ Step 11 - Evaluation Complete

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### Step 1 – Employee Identifies Goals and Job Responsibilities

- The employee will receive an email notification
- They will log in – their review will have green New Button
- Click on the Title (Admin Prof)

Welcome Employee, you are logged in

The screenshot shows a user interface for performance reviews. At the top, it says 'Welcome Employee, you are logged in'. Below this is a section titled 'My Performance Reviews' with a green header. Inside this section, there is a 'NEW' button next to the text 'Admin Prof, Non-Teaching Fac, Sec Staff - Annual'. Below the button, it says 'Current step: Employee Identifies goals and job responsibilities' and shows a progress bar with two circles, the first of which is filled green. Below the 'My Performance Reviews' section are three other sections: 'Recruitment' with a blue header and 'Administration' link; 'Team Performance Reviews' with a green header and a minus sign; and 'Onboarding' with a blue header and 'Onboarding' link.

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# Starting a New Evaluation Form and the Sections

## Employee Performance - Admin Prof, Non-Teaching Fac, Sec Staff - Annual

Start > Goals & Projects > Job Knowledge & Responsibilities > University Competencies > Professional Development >  
Overall Rating > Next steps

Actions ▾

Welcome to the GVSU Performance Management System! The purpose of the annual evaluation process is to ensure your performance is being reviewed and you receive ongoing clear feedback. It also allows an opportunity for you to create development plans for the coming year.

Your supervisor is: [Manager Performance](#)

If you have any questions, please contact Human Resources at 331-2215 or email [perfmgmt@gvsu.edu](mailto:perfmgmt@gvsu.edu).

The **deadline** to identify your goals and projects, job knowledge and responsibilities and professional development plan is **09 Jul 2021**.

To continue, please select "next" below.



since

## Section 1 – Goals and Projects

Employees will enter their goals and projects

Start > **Goals & Projects** > Job Knowledge & Responsibilities > University Competencies > Professional Development >  
Overall Rating > Next steps

Goals & Projects

✓ Saved

Actions ▾

### Employee Instructions:

The content of the Goals & Projects section is intended to facilitate conversation between you and your supervisor. It will not be rated during the evaluation process. This gives you and your supervisor the opportunity to discuss your goals and projects for the upcoming review period. Once you have added your goals and projects, your supervisor will review and approve them for the upcoming review period, or modify them as needed.

Please keep in mind that Goals & Projects should be SMART.

S	M	A	R	T
Specific	Measurable	Achievable	Relevant	Time-bound
<ul style="list-style-type: none"> <li>- State what you'll do</li> <li>- Use action words</li> </ul>	<ul style="list-style-type: none"> <li>- Provide a way to evaluate</li> <li>- Use metrics or data targets</li> </ul>	<ul style="list-style-type: none"> <li>- Within your scope</li> <li>- Possible to accomplish, attainable</li> </ul>	<ul style="list-style-type: none"> <li>- Makes sense within your job function</li> <li>- Improves the business in some way</li> </ul>	<ul style="list-style-type: none"> <li>- State when you'll get it done</li> <li>- Be specific on date or timeframe</li> </ul>

- For each goal or project, click the "Add Goals & Projects" button below and complete the box that appears.

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## Section 2 - Job Knowledge and Responsibilities

### Job Knowledge & Responsibilities

#### Employee Instructions:

Add your key job knowledge and responsibilities. We recommend no more than 4 job knowledge and responsibilities and that you group similar responsibilities into one item. These can be taken from your job description or your understanding of your expectations for your position. Your supervisor will review these items for the coming assessment period for approval.

- For each job knowledge and responsibility, please click on the "Add Job Knowledge & Responsibilities" button below and enter information into the box that appears.
- In the "Title" field, input a brief description of the job knowledge or responsibility (e.g. customer service at the front desk of the office).
- Upload a supporting document with the "Upload Document" button, if desired.
- After you've entered each job knowledge and responsibility, they will save automatically. If edits are needed, you can either edit the fields or select the trash can icon in the upper right-hand corner to remove.
- Click "Next" to move on to the next step.

➔ Add Job Knowledge & Responsibilities

New Job Knowledge & Responsibilities

Job Knowledge & Responsibilities from previous review

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## Section 3 - University Competencies

### University Competencies

#### Employee Instructions:

You will be evaluated annually on your alignment with each of the university competencies listed below. University competencies are set at an institutional level. Review the university competencies to understand the criteria on which you will be evaluated. During your self-assessment, rate and comment on each competency.

For MGS employees there will not be a self evaluation component for the university competencies.

#### Supervisor Instructions:

University competencies are set at an institutional level. Review the university competencies with your employee so they understand the criteria on which you will evaluate them. During the assessment of your employee, rate and comment on each competency. If you would like to move an employee back one step in the process or review rating scale descriptions, visit the [Performance Management Toolkit](#) for instructions.

Click on the Go To Next Step button to move to the next step.

#### 📌 Quality of work

##### Description/Measure

- generate quality work at appropriate quantity levels, meeting timelines, including accuracy, thoroughness, effectiveness and dependability
- make appropriate decisions considering potential impacts
- manage work with appropriate planning, interaction with faculty/staff, students and other customers, and focus on quality
- demonstrate accountability and a drive for results

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## Section 4 – Professional Development

### Professional Development

Professional Development ✓ Saved

**Employee Instructions:**  

The content of the Professional Development section is intended to facilitate conversation between you and your supervisor. It will not be used during the evaluation process. This gives you and your supervisor the opportunity to discuss your development and career goals.

- For each development area, please click on the "Add Professional Development" button below and complete the box that appears.
- In the "Title" field, input a brief description of the development area (e.g. become more succinct in my communications or improve my Microsoft Office skills)
- In the "Description/Measure" field, input additional details (e.g. by when, how you will know you're successful, etc.).
- Upload a supporting document with the "Upload document" button, if desired.
- After you've entered each item, they will save automatically. If you later need to edit the item, simply update the text in any of your development areas and they will save automatically or you can select the trash can icon in the upper right-hand corner to remove.
- Click "Next" to move on to the next step.

Add Professional Development

New Professional Development  
Professional Development from previous review

Title\*

Please enter Professional Development title here ...

Description/Measure

B I U

List Bulleted List Numbered List

Link Unlink

Image

Source

Enter your professional development items here.

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## Section 5 – Overall Rating

In the early part of the process no action will be required here, this will only be available during the rating period.

Overall Rating

This information will be available during the evaluation phase.

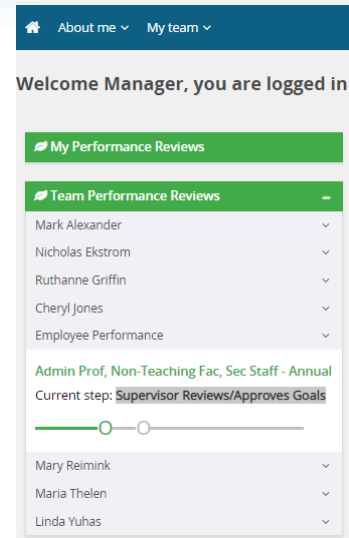
No action is required at this time. Click "Next" to move on to the next step.

Overall Rating

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## Step 2 - Supervisor Reviews/Approves Goals

- The Supervisor will receive an email notification
- The Supervisor will log in and go to Team Performance Reviews
- Locate the specific employee
- Click on the down arrow
- Click on the Title of the review for that employee



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## Supervisors View of the Employee Evaluation

### Supervisor Specific - Start Page Instructions

Employee Performance - Admin Prof, Non-Teaching Fac, Sec Staff - Annual

Start > Goals & Projects > Job Knowledge & Responsibilities > University Competencies > Professional Development >

Overall Rating > Next steps

Last saved: 15 Jun 2021, 4:21 pm Actions ▾

As you review your employee's goals and responsibilities, consider performance only as it relates to planning for the coming year. Consider how the employee's role supports the department and any strategic plans for your area.

If you have questions please contact Human Resources at 331-2215 or email [perfmgmt@gvsu.edu](mailto:perfmgmt@gvsu.edu).

Your **deadline** to complete this task is **23 Jul 2021**.

When you have read this and are ready to begin your review of your employee's plan, please select "Next" below.

GRAND VALLEY STATE UNIVERSITY

Next ➔

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## Section 1 – Goals and Projects

Supervisor will be able to view the employee's information and add additional information if desired.

Goals & Projects ✓ Saved Last saved: 15 Jun 2021, 4:21pm

**Employee Instructions:**

The content of the Goals & Projects section is intended to facilitate conversation between you and your supervisor. It will not be rated as part of the evaluation process. This gives you and your supervisor the opportunity to discuss your goals and projects for the upcoming review period. Once you have added your goals and projects, your supervisor will review and approve them for the upcoming review period, or modify as needed.

Please keep in mind that Goals & Projects should be SMART.

S	M	A	R	T
<b>Specific</b>	<b>Measurable</b>	<b>Achievable</b>	<b>Relevant</b>	<b>Time-bound</b>
- State what you'll do - Use action words	- Provide a way to evaluate - Use metrics or data targets	- Within your scope - Possible to accomplish, attainable	- Makes sense within your job function - Improves the business in some way	- State when you'll get it done - Be specific on date or timeframe

- For each goal or project, click the "Add Goals & Projects" button below and complete the box that appears.
- In the "Title" field, input a brief description of the goal or project (e.g. Improve Microsoft Office skills), and in the "Description/Measure" field, input additional details (e.g. by when, how you will know you're successful, alignment to any strategic plan strategies, etc.).

Click the add Goals & Projects button if you wish to add a goal

➔ Add Goals & Projects

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## Section 2 - Job Knowledge & Responsibilities

### Job Knowledge & Responsibilities

#### Supervisor Instructions:

Please review the job knowledge and responsibilities submitted by your employee and discuss any necessary changes as needed. If you would like to move an employee back one step in the process, visit the [Performance Management Toolkit](#) for instructions.

Click the add Job Knowledge and Responsibilities button additional items

➔ Add Job Knowledge & Responsibilities

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## Section 3 – University Competencies

### Supervisor Instructions:

University competencies are set at an institutional level. Review the university competencies with your employee so they understand the criteria on which you will evaluate them. During the assessment of your employee, rate and comment on each competency. If you would like to move an employee back one step in the process or review rating scale descriptions, visit the [Performance Management Toolkit](#) for instructions.

Click on the Go To Next Step button to move to the next step.

#### Quality of work

##### Description/Measure

- generate quality work at appropriate quantity levels, meeting timelines, including accuracy, thoroughness, effectiveness and dependability
- make appropriate decisions considering potential impacts
- manage work with appropriate planning, interaction with faculty/staff, students and other customers, and focus on quality
- demonstrate accountability and a drive for results

#### Customer Service

##### Description/Measure

- think of students, parents, visitors, faculty and staff as customers
- demonstrate commitment to all customers through, respect, knowledge, responsiveness and courtesy
- build long-term customer relationships by anticipating, listening to, understanding, effectively communicate with and meeting or exceeding our customers' needs
- meet individual needs, paying particular attention to people from diverse

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## Section 4 - Professional Development

You can review the information that the employee added and/or add your own

### Supervisor Instructions:

Please review the development areas input by your employee and discuss any necessary changes as needed. If you would like to move an employee back one step in the process or review rating scale descriptions, visit the [Performance Management Toolkit](#) for instructions.

Click "Next" to move on to the next step.

Item title

Title\*

Attend Training

Description/Measure

**B** *I* U |          Source

attend more training this year .

Attachment

 Upload document

## Section 5 – Overall Rating

In the early part of the process no action will be required here, this will only be available during the rating period.

Overall Rating

This information will be available during the evaluation phase.

No action is required at this time. Click "Next" to move on to the next step.

Overall Rating

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## Steps 3 and 5 – Evaluation Period

There are two periods between steps in the review process where there is no required entry in the system. These periods are set up so your employee can work on meeting their goals. During these periods, both the supervisor and the employee can log in at any time and add Journal entries.

These steps will move automatically after 75 days for the 1<sup>st</sup> one and 23 days for the 2<sup>nd</sup> one. You will receive system notifications when action is required.

About me ▾ My team ▾

journal entry Manager ▾

journal

Performance reviews

You have no journal entries.  
 To add a new journal entry click the button

Create journal entry ×

Title

What's new?

Content

Be descriptive

Tags

Add a tag

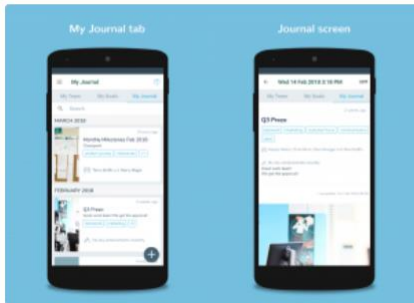
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## Steps 3 and 5 – Evaluation period

Supervisors and the Employees can also use the Everyday Performance app to log Journal entries.

### Journal your performance

Observe and capture everyday successes in words (and photos), record conversations and keep track of your progress. Journal is available in desktop and mobile app.



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## Step 4 – Mid Year Check In

- The Mid year check in step is owned by the supervisor
- The Supervisor will be able to add comments to any areas that information has been added by either the employee or the supervisor

Mid-year check-in conversations are your opportunity to meet and discuss your employee's progress toward meeting their goals. Use the goal plan to drive the conversation and enter any comments to document their progress. If you believe any changes need to be made to their goal plan, discuss with your staff member at this time.

Please note that supervisors will lead this stage of the review process and employee's will not need to enter anything in at this point in the review process.

When you have read this and are ready to begin entering Mid-year review comments on your employee's plan, please click "Next" to go to the next step.



#### Customer Service

- think of students, parents, visitors, faculty and staff as customers
- demonstrate commitment to all customers through, respect, knowledge, responsiveness and courtesy
- build long-term customer relationships by anticipating, listening to, understanding, effectively communicate with and meeting or exceeding our customers' needs
- meet individual needs, paying particular attention to people from diverse cultures and those with special needs
- give timely responses to customer questions and follow-up on inquiries or problems
- take personal responsibility for providing service that is convenient, prompt, and efficient

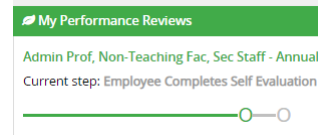
Add comment

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## Step 6 – Employee Completes Self Evaluation

The employee will receive an email notification – they will log in

- Go to My performance review
- Click on the **Title**
- They will be able add comments to all areas
- They will be asked to rate the Job Knowledge & Responsibilities, University Competencies, and their Overall Rating



Overall Rating

Employee Performance

★★★★★  
Not rated

Add comment

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## New Rating Scales

### Exceeding (E)

- Includes individuals who significantly and consistently exceed expectations and role requirements. Exceeds goals set for the year.
- Demonstrates exceptional depth and breadth of role knowledge.
- Demonstrates exemplary conduct for other supervisors/staff members to emulate; highly regarded by others within the University community.
- Exceeds customer's expectations on a consistent basis.

### Succeeding (S)

- Includes individuals who consistently meet and occasionally exceed expectations and role requirements.
- Meets goals set for the year.
- Possesses sufficient depth and breadth of role knowledge.
- Exhibits professional interactions with peers, customers, managers, and/or students.
- Provides accurate and timely assistance to peers, customers, managers, and/or students on a consistent basis.

### Developing (D)

- Includes new employees who are still learning specific skills or key job responsibilities. Not a reflection on the employee's skills, but simply a product of time in the position.
- Needs to gain proficiency in certain skills, knowledge, processes, speed, and/or job standards due to new process.
- Makes a visible effort to improve. Requires support/direction, however, performance demonstrates the ability to meet expectations.
- Makes a conscious effort to demonstrate professional interactions with peers, customers, managers, and/or students.
- Demonstrates a willingness to learn from mistakes in order to adapt conduct effectively.

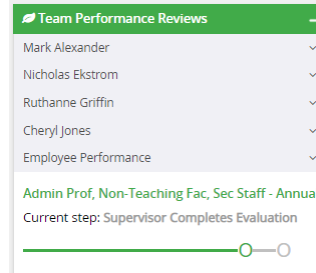
### Needs Improvement (NI)

- Demonstrates inconsistent required role knowledge and does not fully perform all requirements and duties.
- Meets the minimal standards for quantity or quality; often misses deadlines, work is regularly incomplete.
- Takes little to no initiative, even with prompting.
- Requires more than the expected level of supervision due to lower quality work required to complete role successfully.
- Demonstrates inconsistent and/or unprofessional interactions with peers, customers, managers, and/or students.

## Step 7 – Supervisor Completes Evaluation

The supervisor will receive an email notification – they will log in

- Go to Team Performance Reviews
- Locate the employee
- Click on the down arrow
- Click on the **Title**



[Employee Performance](#) has completed their self assessment. It is now ready for you to review and begin the supervisor assessment.

The supervisor assessment includes your employee's self assessment ratings and comments. It provides opportunity for your comments and ratings in the same document. Once you've complete the supervisor assessment, please schedule a discussion meeting with your employee.

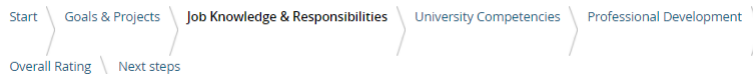
Your **deadline** to complete this task is **13 Jan 2022**.



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## Step 7 – Supervisor Completes Evaluation

- Supervisors will rate Job Knowledge & Responsibilities, University Competencies, and provide an Overall Rating
- Supervisors will be able add comments to all areas



### Quality of work

- generate quality work at appropriate quantity levels, meeting timelines, including accuracy, thoroughness, effectiveness and dependability
- make appropriate decisions considering potential impacts
- manage work with appropriate planning, interaction with faculty/staff, students and other customers, and focus on quality
- demonstrate accountability and a drive for results



Add comment

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## Step 7 – Supervisor Completes Evaluation

Lastly, Supervisors will be required to add Manager Final comments

**Cannot progress the review to the next step**

- Manager final comment missing [Add a comment](#)

Rating summary

Rating summary    Manager Performance    Employee Performance

▼ Goals & Projects

▶ Job Knowledge & Responsibilities

Final comments

**Employee Performance**

No comments made

**Manager Performance**

**B I U** | Source

Your next step: Supervisor/Employee Review Discussion

**Cannot progress the review to the next step**

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## Step 8 – Supervisor/Employee Review Discussion

At this step, the employee and supervisor will meet to review the combined comments and the review.

Once complete, the employee will have the opportunity to acknowledge their review.

Your next step: Employee Acknowledges Evaluation

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

[Go to next step](#)

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## Step 9 – Employee Acknowledges Review

- The employee will receive an email notification
- They will log in
- Go to My Performance Review
- Click on the Title
- Employees can review the evaluation and add their final comments on the Next Step tab

Fully review your assessment, add any additional comments on the last page under Final Comments in your form and click on the Go To Next Step button to finalize.

If you have questions please contact Human Resources at 331-2215 or email [perfmgmt@gvsu.edu](mailto:perfmgmt@gvsu.edu).

Your **deadline** to complete this task is **02 Feb 2022**.



Final comments

Employee Performance

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## Step 10 – Supervisor Reviews Final Acknowledgement

- The supervisor will receive an email notification
- They will log in
- Go to Team Performance Review
- Locate the Employee
- Click the Down Arrow
- Click on the title
- Supervisor can see their final comments and add additional comments, they will also be able to see any employee final comments on the Next Step tab

Once your staff member has had the opportunity to make final comments, review your staff member's overall comments on the assessment. Once you are finished, click the click on the Go To Next Step button to finalize. Once finalized, you will be unable to move the review back a step.

Your **deadline** to complete this task is **07 Feb 2022**.



Final comments

Employee Performance

No comments made

Manager Performance

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did a great job

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## Step 11 – Evaluation Complete

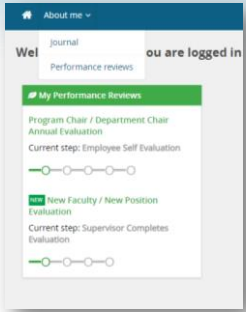
### How to View a Completed Review

#### Employee View

Log Into the Performance Portal

#### Go to About Me – Performance Reviews

Change Status to **Complete** or **All** and search



Status:

Status:

Find your Review and click on **View Report**

2022

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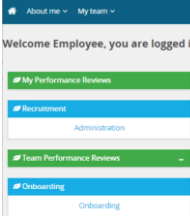
## Step 11 – Evaluation Complete

### How to View a Completed Review

#### Supervisor View

Log Into the Performance Portal

#### Go to My Team – Performance Reviews



Welcome Employee, you are logged in

**My Performance Reviews**

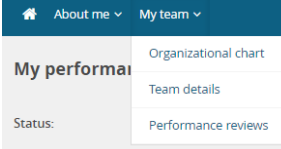
**Recruitment**

Administration

**Team Performance Reviews**

**Onboarding**

Onboarding



About me

**My performance**

Organizational chart

Team details

Performance reviews

Status:



## Step 11 – Evaluation Complete

### Supervisor View

Change Status to Complete or All and click Search

Locate your employee and click on View Report

Employee Performance	Staff Annual Evaluation (Full-Time) <span>STATUS</span> <span>ARCHIVED</span>	Evaluation Complete	N4-Payroll Asst	5 Nov 2020	15 Jan 2021	I want to... <span>▼</span>	View report
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Let's go look at the site

# Thank You