



ELON
UNIVERSITY

PageUp

Performance Management

Reference Guide



Office of Human Resources

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Overview

PageUp: Performance Management provides an enhanced staff member experience for performance management. PageUp delivers a set of tools for saving and measuring progress of goals, reviewing performance standards within the university competencies, and conducting mid-year and end of year reviews.

- Staff members and their supervisors will have responsibilities within the performance management process and as such will receive system-automated emails from employeerelations-1131@mail.pageuppeople.com.
- Based on the permissions that you have been granted in PageUp: Performance Management, not all features/functions described in this document may be available to you.

Permissions

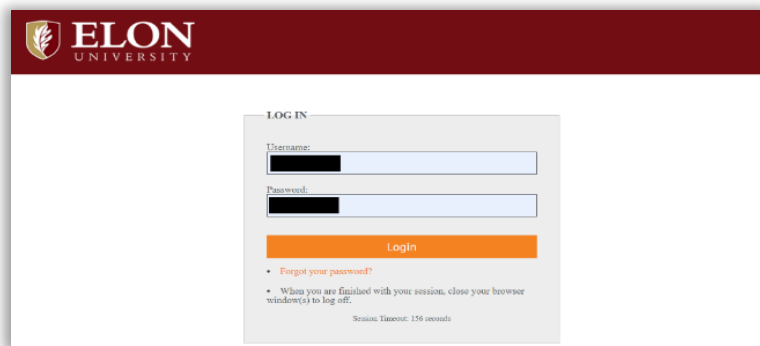
A Permission Group determines what level access a PageUp user has within the system.

- There are different roles within the performance management process and, therefore, there is a need for various levels of permission. Human Resources assigns users their permission group based on the role they operate within, Performance Supervisor or Performance Employee.
- The Performance Supervisor permission group has access to everything the Performance Employee group does with the added access for supervisor review.
- These permissions are separate from the permissions within the Recruitment portion of PageUp.

General Navigation

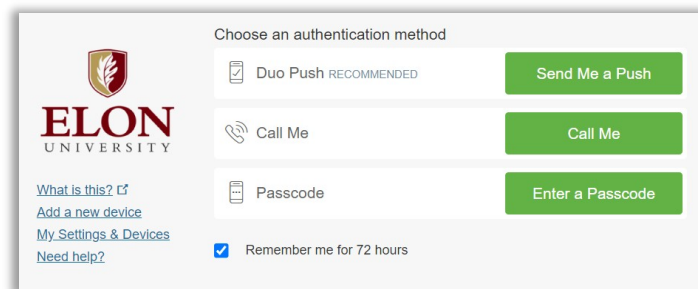
To access the PageUp system, go to click the Human Resources webpage (<https://www.elon.edu/u/fa/hr/>) and click on the PageUp link on the left side of the page.

PageUp Home Screen / Employee Login



The PageUp link on the Human Resource webpage takes you to a login screen. Log into PageUp using your single sign on (SSO) Elon credentials (username and password).

Next, choose an authentication method using Duo Security.



General Guidelines for Using PageUp

- Do not use the Back button in your browser to go back to the previous page, as your session will be interrupted, and you may lose your changes.
- Your session will timeout after 120 minutes of inactivity.
- Do not share your login details with any other person.
- Allow pop-ups within your browser when using PageUp.
- Clean your browser’s cache if unable to login or unable to view stacked menu options

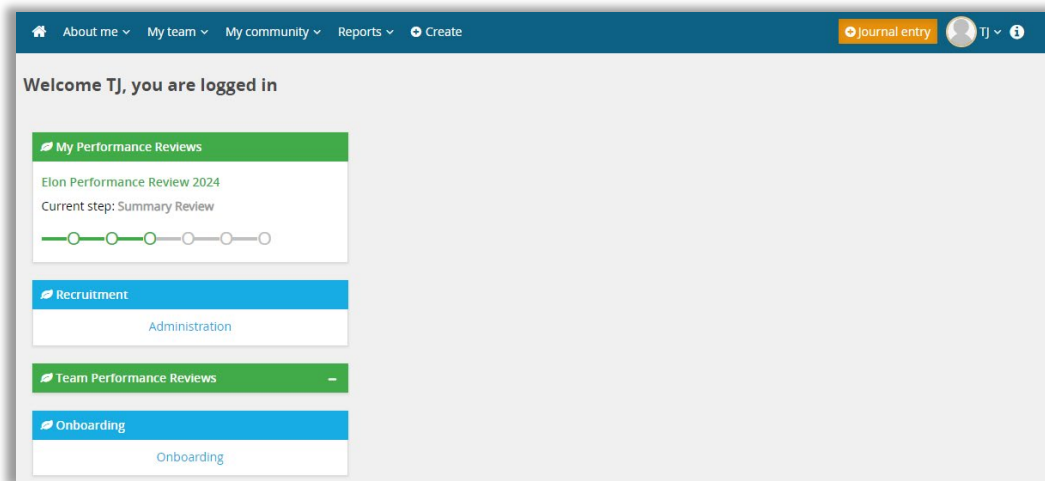
Google Preferred Browser

The preferred browser for PageUp is Google Chrome.

Dashboard

The performance management dashboard is the landing page within the system. Most of the navigation within the system can occur from this page.

- The dashboard shows active performance reviews for you and for your team. It also provides quick access to recruitment and onboarding portions of PageUp.
- Select the hyperlink on the review to open that page.



PageUp: Performance Management Instructions

Depending on your role within the performance management process, staff member or supervisor, the instructions will vary slightly.

NOTE: There are multiple types of instructions you will have access to, an email introducing the specific portion of the process, with a link to login; and in-system instructions with specific action items or to dos for that step.

Initial Employee Email

Hello {EMPLOYEEPREFNAME}:

It is time to initiate the first step, **Goal Setting**, of this year’s performance review.

Login to PageUp: Performance Management

- Login to the PageUp Employee Services website , where you will see the “My Performance Reviews” menu. Select the current review. This link will be active year-round and can always be used to bring you back to your review.

The action items for this phase are:

Goal Setting.

- Follow the instructions within PageUp to type in your 3-5 goals.
 - If helpful, utilize the SMART goal strategy (Review the LinkedIn Learning Video for a refresher).

Competency Overview.

- Review the university performance competencies used during the year-end review of performance. No action is needed other than review.

Attend the Meeting with your Supervisor.

- Be prepared to discuss the goals submitted noting they may be edited or altered.
- Have a conversation to discuss the performance standards for the university competencies.
- Once you are both in agreement with your goals and the performance standards, you will both advance to the “Next Steps” screen and select “I agree”. This will complete your action items for the Goal Setting step.

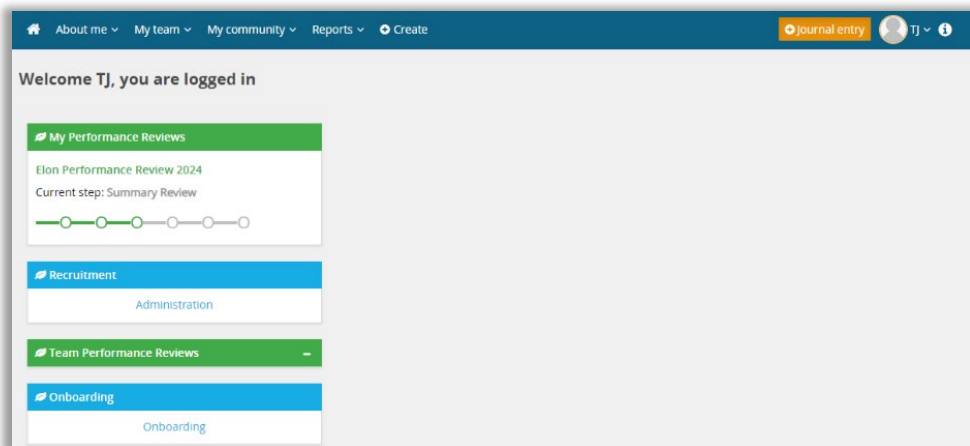
Please complete your goal setting and initial competency expectations conversation by {STEPDUEDATE}.

If you have any questions or concerns during this portion of the process, please contact Employee Relations at EmployeeRelations@elon.edu and a member of that team will contact you.

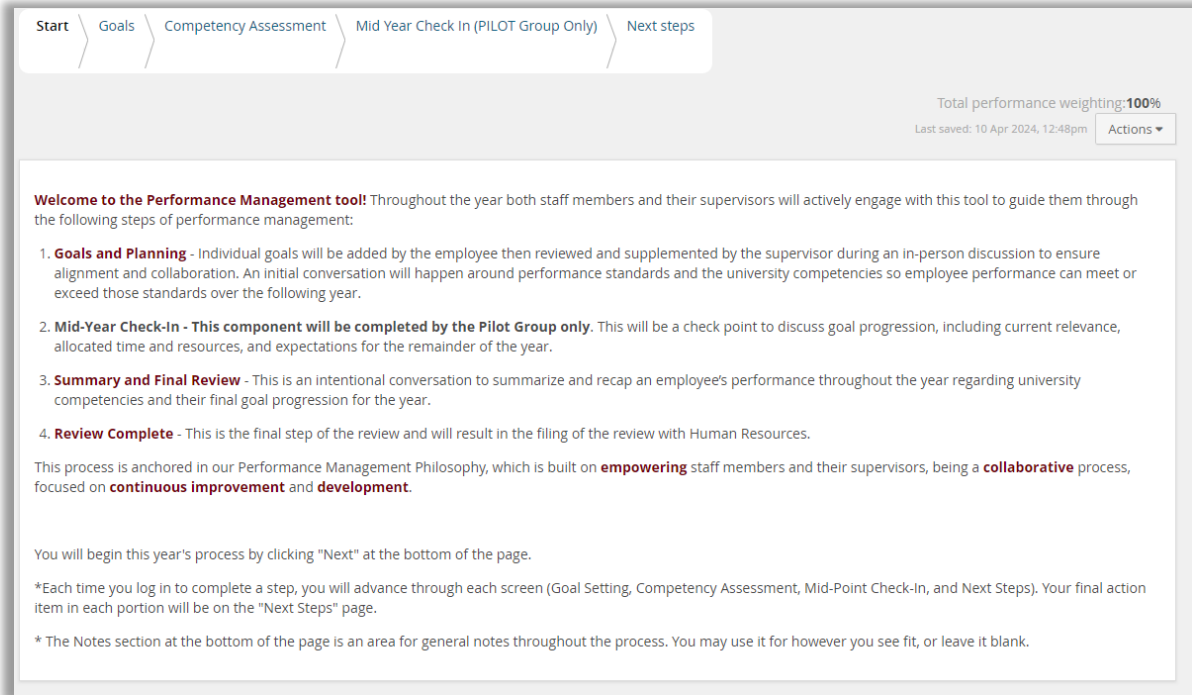
Employee Relations

Employee Process within PageUp

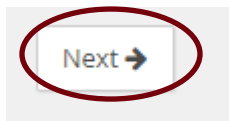
1. Following the instructions in the email, you will login and be brought to the Performance Management Landing Page



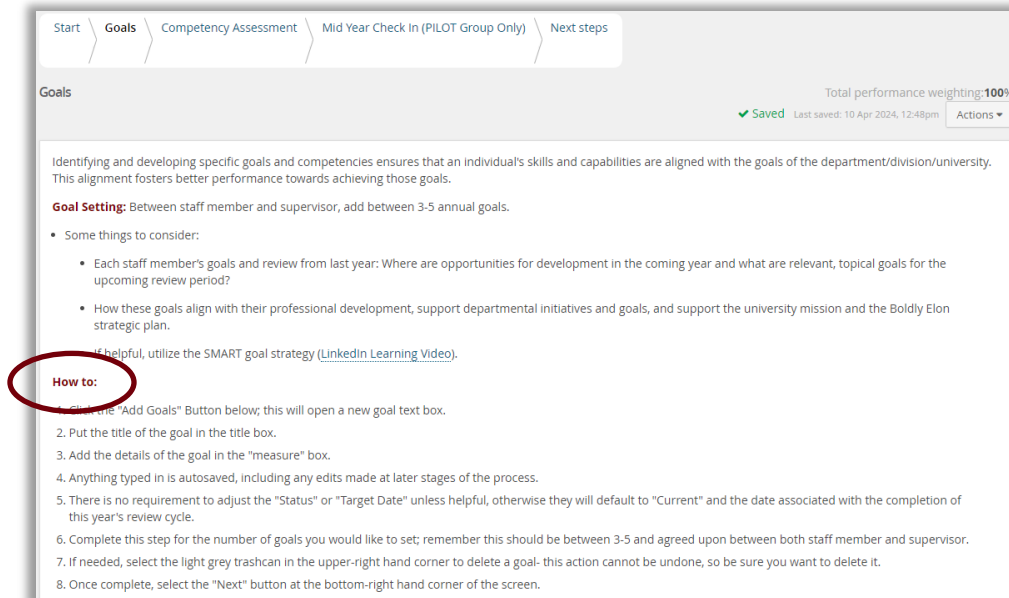
2. This will bring you to the Welcome screen and an overview of the process.



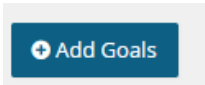
3. You will then select the “Next” button at the bottom of the page or the “Goals” link at the top of the page which will bring you to the instructions for adding goals.



4. The How to: section explains the process of adding the goals.



- A. Click the "Add Goals" Button below; this will open a new goal text box.



- B. Put the title of the goal in the title box.

Title*

- C. Add the details of the goal in the "measure" box.

Measure

- D. Anything typed in is autosaved, including any edits made at later stages of the process.
- E. There is no requirement to adjust the "Status" or "Target Date" unless helpful, otherwise they will default to "Current", and the date associated with the completion of this year's review cycle.

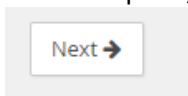
Status

Target date

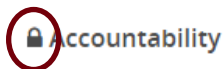
- F. Complete this step for the number of goals you would like to set; remember this should be between 3-5 and agreed upon between both staff member and supervisor.
- G. If needed, select the light grey trashcan in the upper-right hand corner to delete a goal- this action cannot be undone, so be sure you want to delete it.



- H. Once complete, select the "Next" button at the bottom-right hand corner of the screen.

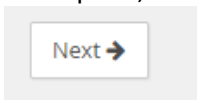


- 5. This will bring you to the Competency Assessment screen, which you will note has the lock icon next to the individual competencies. This indicates there is no input needed right now but rather you should review each competency for 2024 and begin to think about how you may develop within this area throughout the next year.

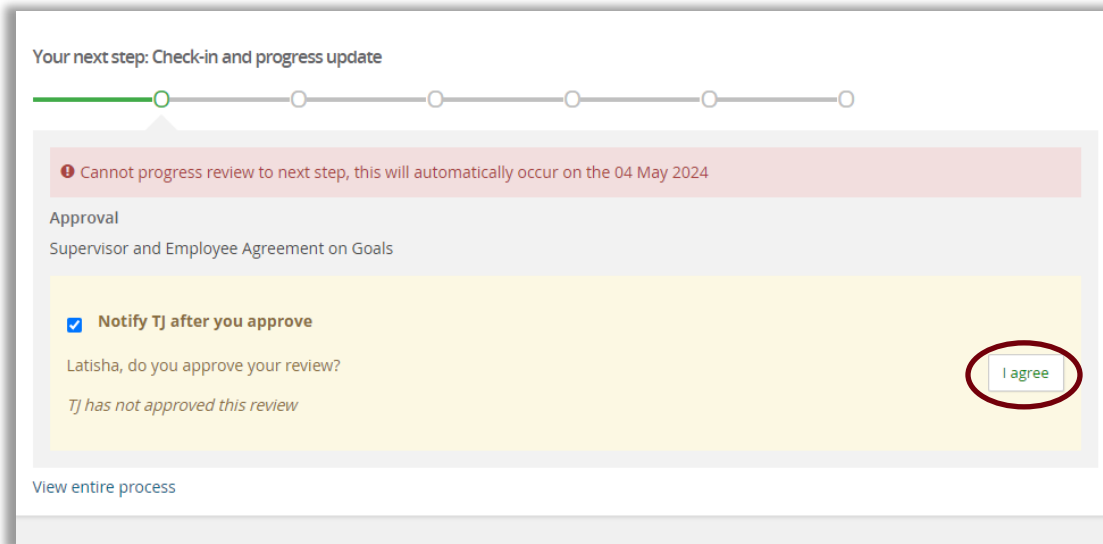


Measure Demonstrates the ownership necessary for achieving desired results. Holds self and staff accountable for following policies and promotes the vision and direction of Elon University, including being fiscally responsible.

- 6. Once complete, select the "Next" button at the bottom-right hand corner of the screen.



7. This will advance you to the “Mid-Year Check In (PILOT Group Only) screen.
 - a. Two items to note, 1) this is only for the pilot group and 2) there is no action item needed for anyone during the goal setting component. Select Next.
8. Once you are content with your goals and prepared to discuss them with your supervisor, you will select the "I agree" button which will notify your supervisor and they will schedule a meeting to discuss your goals and plans for development.

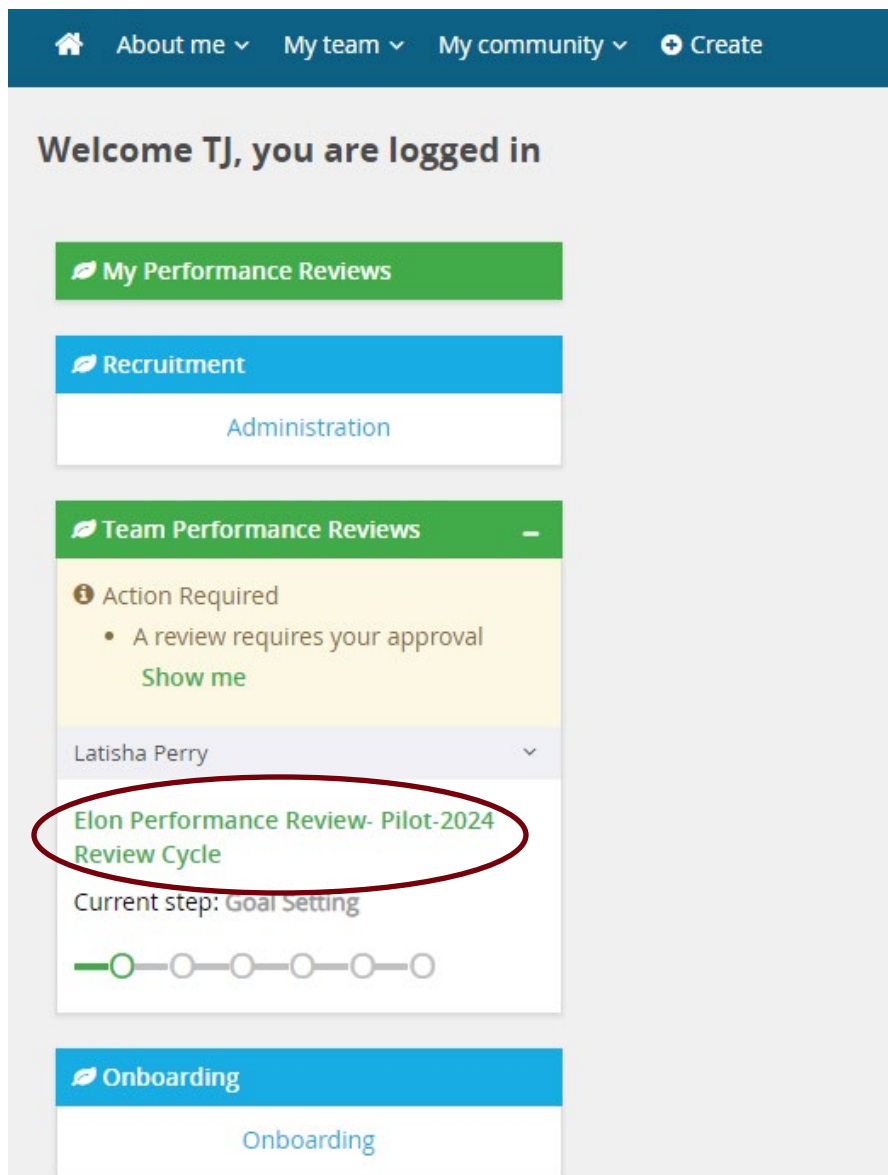


Special Things to Note:

- Temporary Employees will not get a performance review.
- Goals should be set by all members of the staff community, including staff and administrators with faculty rank.

Supervisor Process within PageUp

1. Following the instructions in the email titled “Supervisor, It's Goal Setting Time! Performance Management Process – 2024”, you will login and be brought to the Performance Management Landing Page.



2. Select the appropriate review to open it and go to the “Goals” Page.



3. Review and edit any goals you see fit. Please note that this portion of the process is live and any edits you make will overwrite what the employee has submitted. So be prepared to have a conversation with them about the changes made and the intent of those changes.
 - a. We encourage you to use your initials before the proposed changes, so it is clear who typed what. Example below.

Item title 🗑️

Title*

Measure

B I U | | | | | | | | | Source

LP Measure Test Goal
MK Added context

Status

Target date

Item title 🗑️

Title*

Measure

B I U | | | | | | | | | Source

MK added Measure Test Goal 2

- b. Anything typed in is autosaved, including any edits made at later stages of the process.
- c. There is no requirement to adjust the "Status" or "Target Date" unless helpful, otherwise they will default to "Current", and the date associated with the completion of this year's review cycle.

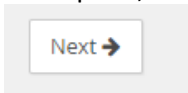
Status

Target date

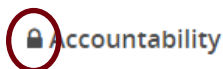
- d. Complete this step for the number of goals submitted or any that you would like to add for the staff member keeping in mind this should be between 3-5 and agreed upon between both staff member and supervisor.
- e. If needed, select the light grey trashcan in the upper-right hand corner to delete a goal- this action cannot be undone, so be sure you want to delete it.



4. Once complete, select the "Next" button at the bottom-right hand corner of the screen.



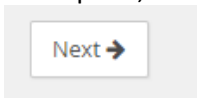
5. This will bring you to the Competency Assessment screen, which you will note has the lock icon next to the individual competencies. This indicates there is no input needed right now but rather you should review each competency for 2024 and begin to think about how your staff members may develop within this area throughout the next year.



Measure

Demonstrates the ownership necessary for achieving desired results. Holds self and staff accountable for following policies and promotes the vision and direction of Elon University, including being fiscally responsible.

6. Once complete, select the "Next" button at the bottom-right hand corner of the screen.



7. This will advance you to the "Mid-Year Check In (PILOT Group Only) screen.
 - a. Two items to note, 1) this is only for the pilot group and 2) there is no action item needed for anyone during the goal setting component. Select Next.
8. Once you are content with the goals and have discussed them with your staff member, you will select the "I agree" button which will complete the goal setting portion of the process.

Your next step: Check-in and progress update



ⓘ Cannot progress review to next step, this will automatically occur on the 04 May 2024

Approval
Supervisor and Employee Agreement on Goals

Approved by Latisha Perry on 14 Mar 2024 at 10:26 AM

TJ, as the manager, do you approve Latisha's review? I agree

[View entire process](#)

Next Steps:

- Pilot Group training and resources available- May 2024.
- End of year Summary Review training and resources available- October 2024.