

PERFORMANCE MANAGEMENT

Setting Goals and Values Manager Guide

The performance management process begins with establishing goals and expectations. Before goals are entered, employees and managers should meet to establish one to five goals or projects for the upcoming year. Managers will also determine which one to three values and competencies are most relevant for the employee's success in the position. This guide will assist managers in recording goals and values and competencies in the Talent Management System.

Logging into PageUp Talent Management System (TMS)

1. Access the PageUp login screen one of two ways:

Direct access at <https://nmuemployees.pageuppeople.com/>

OR

Under the **Employee Services** tab in MyNMU, click **Talent Management System** in the **Additional Employee Resources** section.

The screenshot shows the MyNMU Employee Services page. The 'Additional Employee Resources' section contains a list of links, with 'Talent Management System' highlighted by a green arrow. Other links in this section include 'A/P Career Path Workbook', 'Employee Satisfaction Survey Results', 'Policies, Procedures, Guidelines, Ordinances, Handbooks, Bylaws and Union Contracts', 'LawLogix Electronic I-9 System', and 'Holiday/Seasonal Bonus Day Schedules'.

2. You will be directed to the login screen. Because PageUp is part of NMU's single sign-on service, log in with your NMU ID and password.

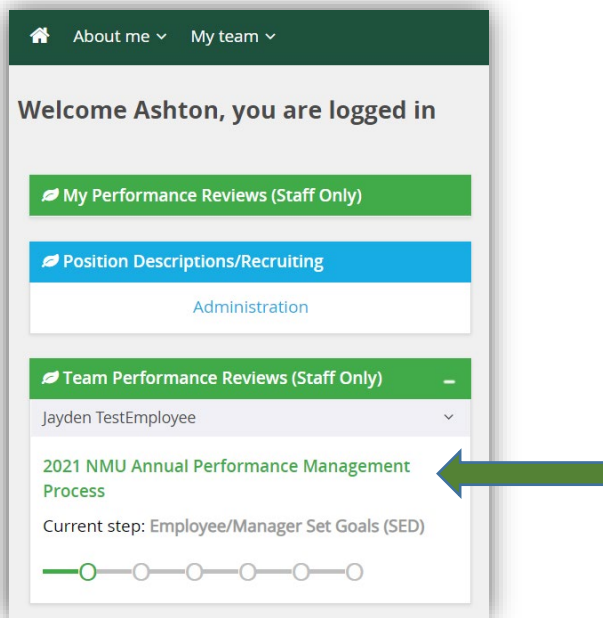
The screenshot shows the PageUp login screen. It features a green header with the 'PageUp' logo and the text 'Login is required to use this site. Please enter below.' Below the header are two input fields: 'Email Address' and 'Password'. There is a 'Forgot my password' link and a yellow 'LOGIN' button. At the bottom, there are links for 'Need Help? Contact the Help Desk!' and 'New to NMU? Activate your account'.

3. You will land on the Talent Management System Employee Service menu page.

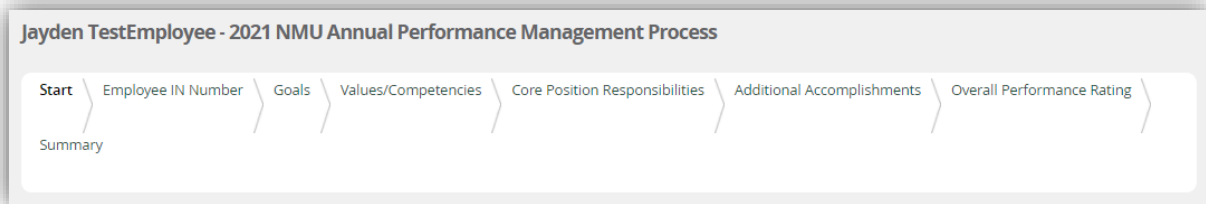
Recording Goals

The *Employee/Manager Set Goals* step of the process is a shared step where the employee or manager can enter and edit goals. You will have access to record goals for your employee(s). Any entry or change made to the goals entered into the system should be discussed. Ongoing discussions throughout the year is key performance management. You may find that goals need to be added or updated, if so, managers are able to enter and edit goals throughout the year.

The Employee Service menu page provides you direct access to your employee's performance review. Click on the green title of the current review you wish to open.



Upon entering the performance review, you will see all of the sections that make up the form. During the *Employee/Manager Set Goals* step, employees should only enter the **Employee IN Number** and **Goals**. If you are completing the review on behalf of the employee, you will complete **Employee IN Number, Goals** and **Values/Competencies**.



As this is a shared step, both you and your employee will have the ability to edit. If your employee is logged into the review and entering goals at the same time you will receive an error message:

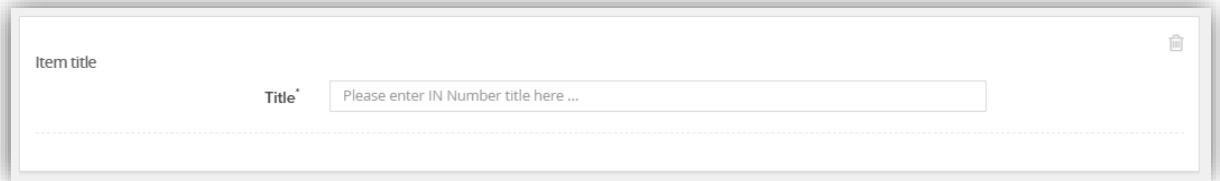
This employee has been opened by the employee in another window. Editing has been disabled to prevent conflicts.

You will always be provided directions about the current step on the **Start** tab. Click **Next** and you will be brought to the **Employee IN Number** tab. *You will only need to enter your NMU IN if the employee has not yet done so.*

1. Click on the **Add IN Number** button.

Add IN Number

2. Enter the employee's NMU IN in the box

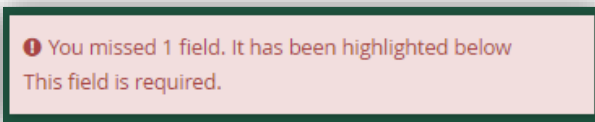


Item title


Title*

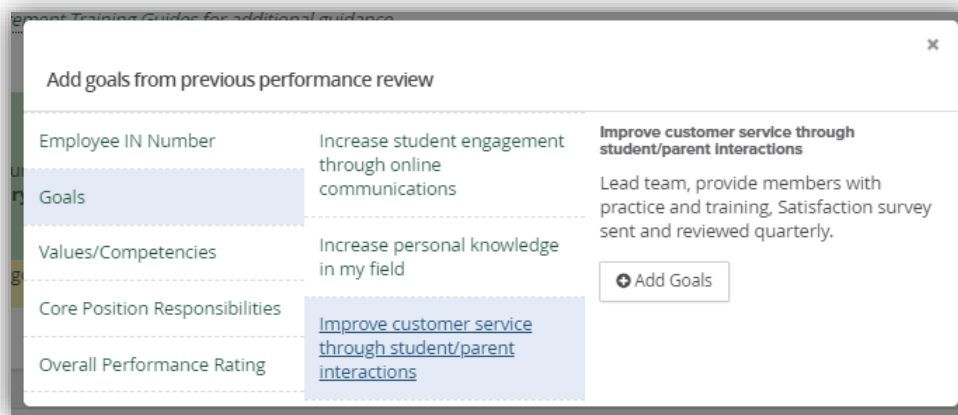
3. Click **Next**.

Note: The NMU IN is required. If you do not enter one, you will receive an error message and will not be able to move forward.

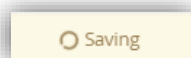



Upon entering the **Goals** section, you will be provided on-screen instructions. Here are a few tips to keep in mind when entering goals:

- Record detailed [SMART goals](#).
- Each goal entered **must** be added individually. Goals are entered individually in order to allow for ratings during the year-end evaluation. Click on the **Add Goals** button  to make a new entry.
- If the employee has already entered goals you will be able to view and make edits.
- Once more than one performance evaluation has been recorded in the system, you will have the ability to add goals from the individual's previous evaluation. Click on the **Add Goals** button and select **Goals from previous review**. Select the goal you wish to add and click **Add Goals**.



- Saving happens automatically while typing and when you hit a button. You will often see a saving notice appear on your screen.




- You may cut and paste into the text boxes. You may use the formatting tools.
- The system does have spell-check and will highlight any spelling mistakes.
- If you've added an extra goal text box by mistake, click on the trash can to delete the :ry.
- You may upload an attachment by clicking on the **Upload document**.

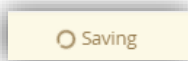
Once you have entered the goals, click **Next** to move to the **Values/Competencies** tab.


Recording Values and Competencies

Managers should review the [NMU Values and Competency Statements](#) and determine which two to three statements are most critical for the employee's success in the position. Managers and employees should discuss the selected statements and managers should note them in the performance review under the **Values/Competencies** tab.

Upon entering the **Values/Competencies** section, you will be provided on-screen instructions. Here are a few tips to keep in mind when entering behavior statements:

- Managers must add Values/Competency Statements prior to the kick off of the year-end evaluation period. Click on the **Add Values/Competencies** button  to make a new entry.
- Each value/competency must be entered individually for the ability to rate during the year-end evaluation.
- Edits may be made throughout the year while in the following steps: *Employee/Manager Set Goals* and *Finalize Goals/Ongoing Discussions*. You will not be able to make changes to the goals and values once the employee self-review step is initiated in the system.
- Saving happens automatically while typing and when you hit a button. You will often see a saving notice appear on your screen.



- You may cut and paste into the text boxes. You may use the formatting tools.
- The system does have spell-check and will highlight any spelling mistakes.
- If you've added an additional box by mistake, click on the trash can to delete the entry .
- You may upload an attachment by clicking on the **Upload document**.

Once you have entered/verified the employee's goals and entered the values/competencies critical for this position you are done with this step. You may also use the [Journal and 1:1 features](#) to capture goal progress and accomplishments throughout the year. Near the end of the fiscal year the employee self-review step will be initiated.

Reviewing and Printing Goals and Values/Competencies

Once you have completed entering your goals and values/competencies, you may click on the **Summary** tab. Here you will find a high-level summary snap-shot of the goals entered into the system.

Summary ⌵

Summary

▼ Employee IN Number

1. 12345678

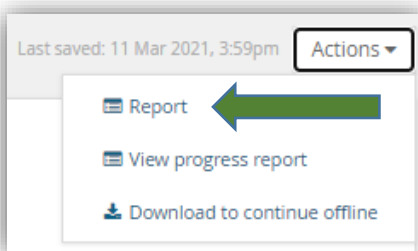
► Goals

1. Increase student engagement through online communications
2. Increase personal knowledge in my field
3. Improve customer service through student/parent interactions



► Values/Competencies

1. Connections

You may also review, save and/or print the goals by clicking on the **Actions** drop-down menu and select **Report**.



Note: You will not be able to access the **progress report**. An error page will pop-up. Always click on **Report**. Also, do not download to continue offline; this is an available feature for completing the performance evaluation portion of the performance management process.

The report will open in a new window. In the top right corner, you will see icons to save as a PDF  or you may print  the report.