

# Online Performance Review Form, System and Process

## 1. What are the components of the annual review form?

I. Goals – This section allows supervisors to add departmental goals for their direct reports and employees to add personal goals for the current or upcoming review year. Employees and supervisors can add attachments to and comment on the employee's personal goals. The supervisor should identify the status of each personal goal during the review process.

II. Self-Assessment – This section allows employees to comment on the performance of their job duties and how they have exhibited the behavioral expectations throughout the review year.

III. Job Duties - This section includes an employee's specific essential Job Duties as written on their individual position description which are rated by their supervisor. The rating for the employee's performance of these specific job duties will account generally for 80% of the employee's overall rating.

IV. Behavioral Expectations - This section includes six key competencies all employees are expected to exhibit and accounts for generally 20% of the employee's overall rating. These competencies include:

- Accountability/Dependability
- Ethics/Integrity
- Collaboration
- Effective Communication
- Continuous Improvement
- Service Excellence

Examples for each of the six competencies can be found on the [HR website](https://hr.ua.edu/employee-resources/performance-management) at <https://hr.ua.edu/employee-resources/performance-management>.

V. 5-tier rating scale - The rating scale includes the following ratings:

- Does Not Meet Expectations
- Partially Meets Expectations
- Meets Expectations
- Partially Exceeds Expectations
- Consistently Exceeds Expectations

## **2. How do I access the performance review system?**

A link to the system can be found on the [Performance Management website](#).

## **3. Who needs an annual performance review?**

All regular\*(full-time and part-time) staff employees, with the exception of employees in an official introductory period as of March 31, should receive an annual performance review conducted by their supervisor of record as of March 31.

All regular\*(full-time and part-time) staff employees who are not in an official introductory period as of March 31 and who move to a different position with a different supervisor between April 1 and May 15 in the new review period will have their annual review conducted by their supervisor of record as of March 31.

If there is no current supervisor to conduct the review, then the next-level supervisor should conduct the annual review.

*\*It is not necessary to conduct reviews on Temporary or Postdoctoral employees.*

## **4. Is there training available on this system?**

Training videos and other resources are available on the [Performance Management website](#). These resources demonstrate for each type of employee how to complete their portion(s) of the review.

## **5. What if I have technical questions about the system?**

Any questions about the use of the performance review system should be sent to [uaperformance@ua.edu](mailto:uaperformance@ua.edu).

## **6. Can I access the performance review system from a mobile device?**

Yes

## **7. As a supervisor, do I need to add departmental goals in the system for my employees?**

If there are departmental goals for the review year which will inform the personal goals set for an employee, it is recommend to add them in the Goals section found in the Your Annual Review section of your dashboard. The departmental goals will automatically populate in the Department Goals section for each of your direct reports.

## **8. Do I need to submit goals in the system?**

If directed by your supervisor, you should submit goals for the current review year up through September 30 or an internal deadline provided by your supervisor. Instructions on the Goals section is available at [Performance Management website](#).

## **9. Do I need to submit a self-assessment in the system?**

If directed by your supervisor, you should submit a self-assessment for the current review year. The self-assessment section will open on March 20. Once you submit your self-assessment to your supervisor you must request your supervisor to return it, prior to your supervisor beginning your review ,if edits are needed.

**10. What if my job duties in the Principal Job Responsibilities section are not accurate?**

You should bring this to your supervisor’s attention so that the position description can be updated for your next annual review. Updates must be submitted no later than what date should be use?. Your review should be reflective of your actual/current job duties, even if some of the job duties listed no longer apply. See the Accessing and Updating Position Description instructions below.

**11. As a supervisor, what if my employee’s job duties in the Principal Job Responsibilities section are not accurate?** The employee’s review should be reflective of their actual/current job duties, even if some of the job duties listed no longer apply. If the position description needs to be updated, it should be submitted no later than ???to ensure the updated duties will populate in the annual review. See the Accessing and Updating Position Description instructions below.

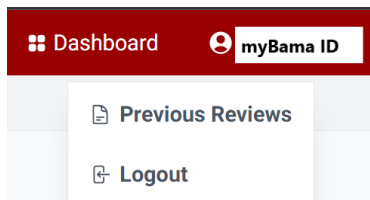
**12. When are annual performance reviews for the current review year to be completed?**


The annual performance review process, including all signatures, discussions, and employee acknowledgements, is to be completed no later than May 15. However, supervisors can require earlier deadlines in the process. Should an employee choose not to acknowledge their review by the May 15 deadline, the review will be considered received and acknowledged, and become a part of the employee’s UA personnel file.

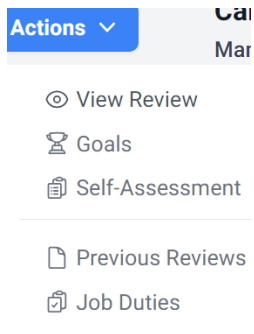
**13. How can I get a copy of a completed review in the performance review system?**

Reviews completed in the performance review system can be accessed as follows:

Employees - Select **Previous Reviews** from the dropdown menu on the main page.



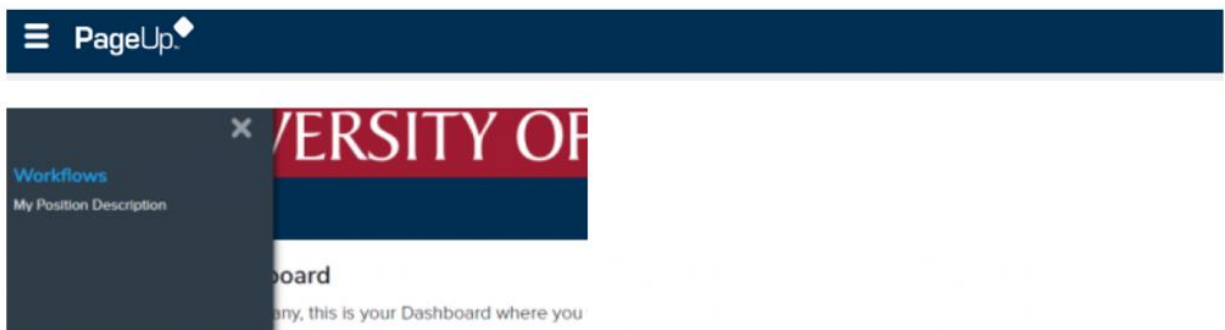
Supervisors - Select **Previous Reviews** From either the grid view  or the Actions dropdown for each employee in the *Your Employees* section of the dashboard.



## Accessing and Updating Position Descriptions

### 14. How can I access my position description?

Log into your "MyBama" account, click the PageUp icon to access your position description.



### 15. I believe my position description does not reflect my job duties and responsibilities, what do I need to do?

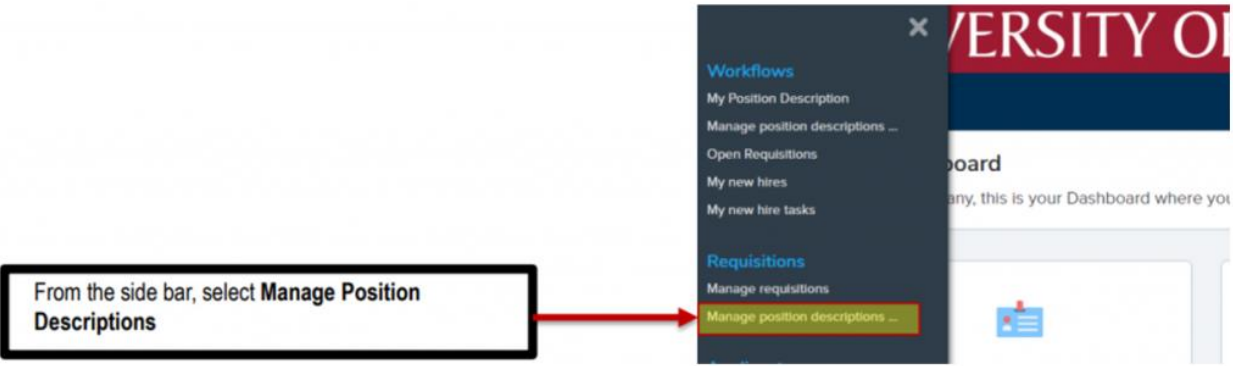
Please contact your Direct Supervisor for any updates or changes.

### 16. What if my employee's position description is not current and/or accurate?

The supervisor may submit accurate job duties up through January 31 for the current review cycle.

### 17. How do I update my employee's position description?

You can access the UA PageUp Recruitment Portal.



Use the search criteria to find the position description position #, classification title, or incumbent's name.

We suggest searching by position number or by department, not both. You can also search by the employee name.)

Position description

PD No.	Classification Title	Working Title	Position Number	Position Class Code	Employee Name	Employee CWID
Supervisor Name	Appointment type	Division	College	Department/Organization	Approval status	Status
	All	All	All	All	All	Active

Working Title	Position Number	Position Class Code	Employee Name	Supervisor Name	Date modified	Approval status	
Admin Support	12345	ABC	John Smith	John Doe	Sept 2, 2020	Approved	<a href="#">Edit</a> <a href="#">View</a>

To update the position description, please select "Job Duties Update Only" from the dropdown box.

### POSITION DESCRIPTION INFORMATION

To edit an approved Position Description scroll to the bottom of the form and press "Update PD"  
Click "OK" in the pop-up window that appears to reset the approval process

#### POSITION DETAILS

Type of Action Requested:\*

Type of Funding:\*

Will you submit the position for posting once approved?:\*

Explanation of the Request (Please provide a detailed explanation of what has changed for this position and department. Any changes to department background checks should be included here):\*

Reclassification

Select

New position

Modification

Reclassification

**Job Duties Update ONLY**

No Changes to PD – Posting Job

Type of Action Requested: \*

Type of Funding: \*

Will you submit the position for posting once approved? \*

Explanation of the Request (Please provide a detailed explanation of what has changed for this position and de  
changes to department background checks should be included here): \*

Justification for Filling or Reclassifying Position (Enter a detailed justification of the mission related reason that  
must fill or reclassify this position.): \*

Please follow your department's Approval Workflow process.

[Additional PageUp training resources are available on the HR website](#), including a [PDF guide with instructions to check the status of a position description](#) and a [position description template](#).