WVU PERFORMANCE REVIEWS: SUPERVISOR GUIDE

This guide was created to assist West Virginia University supervisors in completing the Performance Review process.

Quick Tips for Getting Started

- 1. To begin the performance review process, navigate to <u>wvu.bluera.com/wvu</u>.
- 2. Select **Emp_Reviews** from the drop-down menu on the main page.



- 3. The Blue dashboard is divided into two sections: Tasks and Reports:
 - Tasks All forms that need to be completed.
 - **Reports section** All submitted forms become reports (including those from this year and prior years). Reports can be downloaded as a PDF.

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Note: The reports sometimes are hidden from view. Search by report name keywords or year for easier access to prior reports. You also may select the **Show child reports** option to expand the entire list of reports.

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Process Overview

- You will receive an email from Employee Relations to complete a review for each of your direct reports. You can click on the link in the email to access the employee review form. You also can go directly to your Blue dashboard (<u>wvu.bluera.com/wvu</u>). All forms to complete will be listed in your **Tasks** section.
- 2. Read though the **Welcome** page and select the **Next** button.

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3. This page determines what review template you will be given for your employee. There are two versions of the review—one geared towards supervisors who have direct reports and one geared towards those who do not. If you pick the incorrect answer, you will be directed to the wrong template, which will be locked from editing.

Note: If you select the wrong template, you will not be able to back up and pick a different answer to route to the correct form. You should contact your HR Partner or Employee Relations to have the review reset. Once the review is reset, you can access the review again, pick the correct answer, and the correct template will display.

4. On the following page, select **Yes** or **No**, click **Save** then **Next**. The **Submit** button will be unavailable until the review is saved. It is important to save often.

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- 5. This review is the traditional style for an employee without direct reports. You can select either the **Traditional** or **Memo** view depending on your preferences. A traditional style review for an employee with direct reports looks very similar, but it includes different sections.
- You are required to select a rating for each section. If a rating other than Valuable Performer is selected, you must complete the Comments field. Each section gives an explanation and key points to consider when determining a rating.
- 7. You are required to select a rating for Achievement of Goals. If goals were not set at the beginning of the review period, you can select the Not Applicable-No Goals option. You must select a rating and submit comments for the Overall Rating section.

Note: You should save your work often. This page will time out quickly and information will be lost. The **Submit** button will remain unavailable until all required options are completed on the page. A red exclamation point will appear next to any incomplete sections. You will have the option to save partially complete information and return to it at a later time.

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9. Be sure to complete the section for goals.

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10. Complete the section to share an employee's areas of strength and areas for improvement.

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2019-20 WVU Annual Performance Review for	
This section details the individual's strengths and areas for development.	
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Individual's Areas for Improvement (for current or future job):	
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11. Read instructions on this page, select the date and type name in the field to sign. Click **Save** and **Next** for the summary page.

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12. This is the summary page of all information being submitted. You should review to confirm all information is correct. If changes need to be made, you can select the **Previous** button and make changes. If the information is correct, click **Save** and **Submit**. After submitting, an email will be sent to the second-level supervisor for approval.

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- 13. The second-level supervisor will receive an email that a review has been submitted and requires their approval. The second-level supervisor can click the link directly in the email to access the form. Second-level supervisors also can access the form directly from their Blue dashboard. The form will be listed in their **Tasks** section.
- 14. This is the form the second-level supervisor will see. They should review the information. And if they agree with the review, the second-level supervisor should type their name in the **Name** field and click **Sign** in the top-right corner. If they do not agree, second-level supervisors should not sign the review. Instead, the second-level supervisor should communicate with the first-level supervisor outside of the Blue system that an edit needs to be made. The first-level supervisor should work with their HR Partner to have the review reopened for changes.

Note: If the second-level supervisor signs the review and later decides that a change needs to be made, they will need to return to this page and click **Unsign** in the top-right corner. Once the review has been unsigned, you should work with your HR Partner to have the review reopened for changes.

15. If a review needs reopened for edits, you should wait for confirmation from your HR Partner or Employee Relations that the review has been reopened. You will not receive an email from Blue. You should go directly to their Blue dashboard to access the form in your **Tasks** section. You then should make edits, save the review and submit it. An email will be sent to the second-level supervisor to approve the review.

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- 16. Once the review has been approved by the second-level supervisor and by the dean or vice president, you can conduct the one-on-one employee review meeting. You will receive an email with a link to complete the one-on-one meeting form. You can access the review in your **Tasks** section. You also can access a PDF of the review in your **Reports** section. You should complete and submit the one-on-one meeting form in Blue on the day you meet with the employee. It is very important that you submit this form. The employee will not be able to view a copy of their review until this form is submitted.
- 17. The employee will receive an email once they have met with their supervisor. The review will appear in the employee's **Reports** section within 48 hours of receipt of the email. The employee will be given 10 business days to make comments and sign their review. The comments form will be in the employees **Tasks** section. This form is optional. The review will be considered final 15 days following the employee's one-on-one meeting.

2019-	-20 One-on-one Employee Meeting Comments for	
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