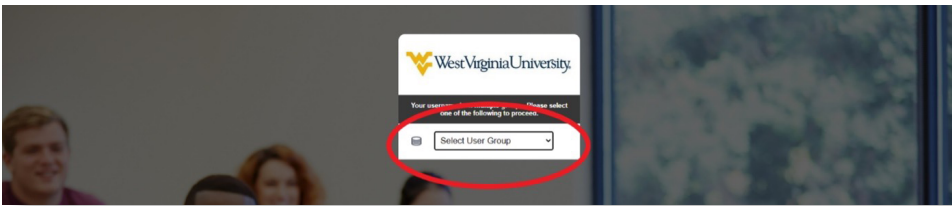


# NAVIGATING BLUE

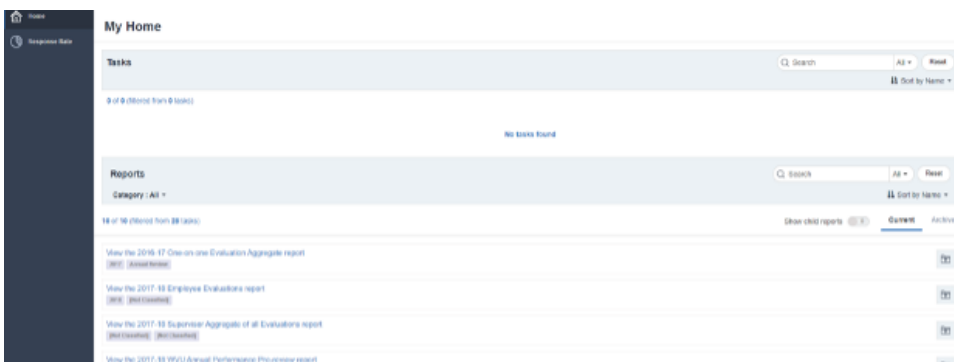
This guide was created to assist West Virginia University supervisors in completing the Performance Review process.

## Quick Tips for Getting Started

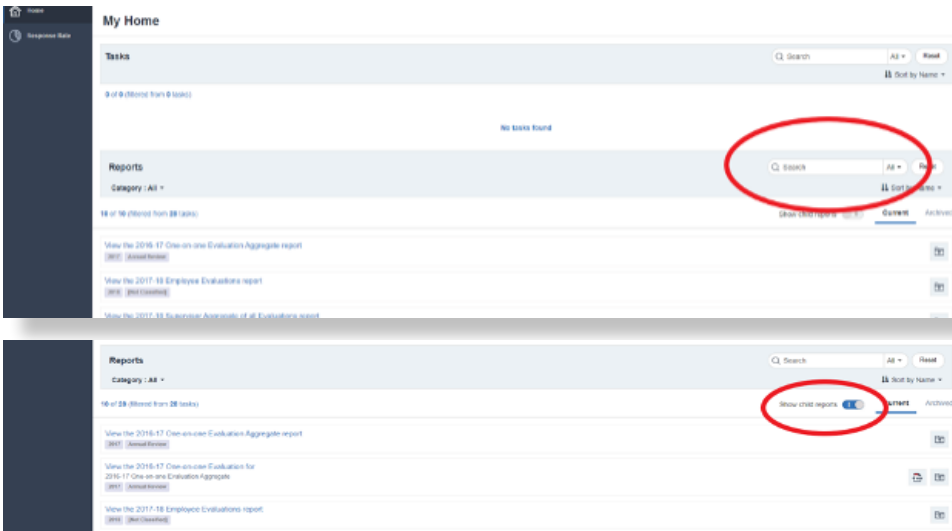
1. To begin the performance review process, navigate to [wvu.bluera.com/wvu](http://wvu.bluera.com/wvu).
2. Select **Emp\_Reviews** from the drop-down menu on the main page.



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.

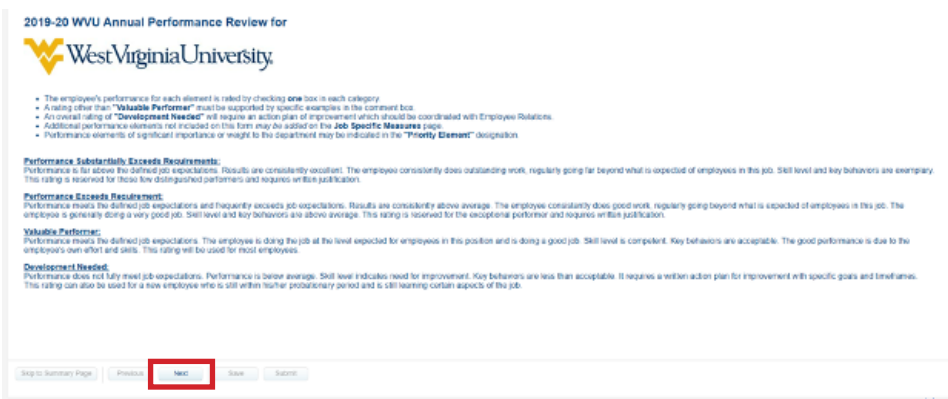


**Note:** The reports sometimes are hidden from view. Search by report name keywords or year for easier access to prior reports. You also may select the **Show child reports** option to expand the entire list of reports.



## Process Overview

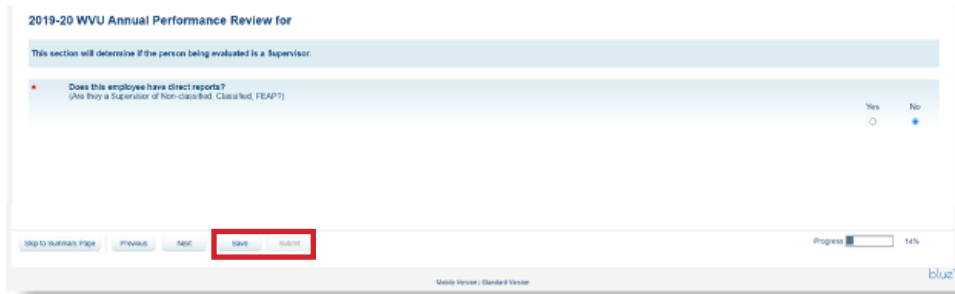
1. You will receive an email from Employee Relations to complete a review for each of your direct reports. You can click on the link in the email to access the employee review form. You also can go directly to your Blue dashboard ([wvu.bluera.com/wvu](http://wvu.bluera.com/wvu)). All forms to complete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



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.

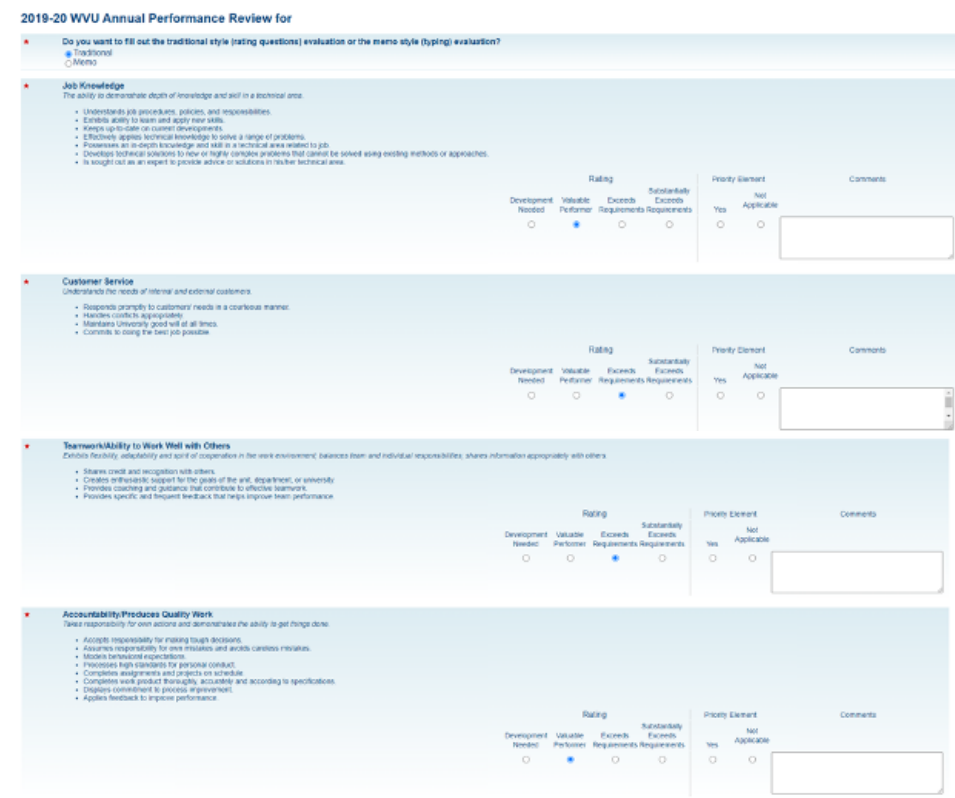
**Note:** If you select the wrong template, you will not be able to back up and pick a different answer to route to the correct form. You should contact your HR Partner or Employee Relations to have the review reset. Once the review is reset, you can access the review again, pick the correct answer,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

- 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.**



- 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.
- 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.



**Communicates Well with Others**  
Effectiveness in dealing with students, peers and subordinates.

- Communicates in a clear and concise manner both verbally and in writing.
- Clearly communicates respectfully with all individuals.
- Skilfully handles conflict.
- Listens effectively to feedback, peers and subordinates.
- Asks good questions and probes for answers.

Rating					Priority Element		Comments
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Yes	Not Applicable		
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

**Proactive/Shows Initiative**  
The ability to respond to problems, changes and obstacles independently.

- Eager to improve the way things are done.
- Takes action to solve problems and produce results without prompting.
- Seeks increased responsibilities.

Rating					Priority Element		Comments
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Yes	Not Applicable		
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

**Flexibility/Embraces Change**  
Ability to embrace changes with a positive attitude through making appropriate responses and behaviors when changes are made.

- Open to change and to new information.
- Adapt behavior and work methods in response to new information, changing conditions or unexpected obstacles.
- Sees the value of change to the program.
- Keeps informed about cutting edge research in his/her area of expertise.

Rating					Priority Element		Comments
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Yes	Not Applicable		
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

**Achievement of Goals**  
If goals, objectives, projects or assignments were assigned to the employee at the beginning of the evaluation period, Supervisors/Managers can evaluate the performance and the results achieved by the employee. Supervisors/Managers should provide an overall rating, whether it was one goal or multiple goals.

Rating					Priority Element		Comments
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Not Applicable - No Goals	Yes	Not Applicable	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

**Overall Rating**  
An overall rating must be supported by specific examples in the comments box.

Rating					Priority Element		Comments
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Yes	Not Applicable		
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Interim responses saved

Progress  29%

8. If you would like to include department specific performance elements not listed on the form, you can include those details in this section.

**2019-20 WVU Annual Performance Review for**

**Performance Elements for Job Specific Measures:**  
Additional performance elements not included on this form may be added now.

- Space has been provided, and is designed to accommodate department-specific performance elements not covered by one of the performance elements listed on the form (which may be unique to this employee's job) as well as any measures related to compliance such as FERPA, HIPAA, NCAA, ethics, safety, state or federal regulations. This will reinforce accountability for these measures, which should be identified and discussed with the employee at the beginning of the performance review period.
- These elements are not required. If you do not wish to add additional elements, leave this page blank and click next.
- If adding elements, please type the name of the element you are rating (FERPA, HIPAA, ethics) and the details in the comment box and select a rating and/or priority element.

**Additional Element 1:**

Rating					Priority Element		Type Name of Element and Details Here
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Not Applicable	Yes	Not Applicable	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

**Additional Element 2:**

Rating					Priority Element		Type Name of Element and Details Here
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Not Applicable	Yes	Not Applicable	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

**Additional Element 3:**

Rating					Priority Element		Type Name of Element and Details Here
Development Needed	Valuable Performer	Exceeds Requirements	Substantially Exceeds Requirements	Not Applicable	Yes	Not Applicable	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Interim responses saved

Progress  43%

9. Be sure to complete the section for goals.

**2019-20 WVU Annual Performance Review for**

This section may be used to establish goals, objectives, projects or assignments for the coming year.

2020-21 Goal/Objective/Project/Assignment

2020-21 Goal/Objective/Project/Assignment

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

2019-20 WVU Annual Performance Review for

This section details the individual's strengths and areas for development.

Individual's Areas of Strength:

Individual's Areas for Improvement (for current or future job):

Interim responses saved.

Skip to Summary Page Previous Next Save Submit

Progress 71%

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.

2019-20 WVU Annual Performance Review for

Immediate Supervisor/Manager (SI)  
You have now completed the level one performance review step.

- Please sign and date below to designate you have completed this step then click the next button below to review the summary page of all your responses.
- On the summary page you will click submit to forward the document to your second-level supervisor for review and sign-off.
- You will be notified via e-mail from Employee Relations once you are authorized to meet with the employee to complete the review process. This should occur during the first week of March 27, 2021.
- DO NOT** communicate any review results to employees prior to this notification from Employee Relations.

Today's Date  
Choose Month  
Choose Date

Interim responses saved.

Skip to Summary Page Previous Next Save Submit

Progress 80%

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.

2019-20 WVU Annual Performance Review for

This is the summary of all your answers. You must click on the "Submit" button below to finalize your feedback submission. If you need to change any of your answers, please click on the appropriate question below.

This section will determine if the person being evaluated is a Supervisor.

Does this employee have direct reports?

Do you want to fill out the traditional style (rating questions) evaluation or the memo style (typing) evaluation?

Traditional

Job Knowledge  
Rating  
Comment

Customer Service  
Rating  
Comment

Teamwork/Ability to Work Well with Others  
Rating  
Comment

Accountability/Produces Quality Work  
Rating  
Comment

Proactive/Shows Initiative

Rating:

Comment:

Flexibility/Embraces Change

Rating: Vexable Partner

Achievement of Goals

Rating:

Overall Rating

Rating:

Comment:

Performance Elements for Job Specific Measures: Additional performance elements not included on this form may be added now.

- Space has been provided, and is designed to accommodate department-specific performance elements not covered by one of the performance elements listed on the form (which may be unique to this employee's job) as well as any measures related to compliance such as FERPA, HIPPA, NCAA, ethics, safety, state or federal regulations. This will reinforce accountability for these measures, which should be identified and discussed with the employee at the beginning of the performance review period.
- These elements are not required. If you do not wish to add additional elements, leave this page blank and click next.
- If adding elements, please type the name of the element you are rating (FERPA, HIPPA, ethics) and the details in the comment box and select a rating and/or priority element.

Rating:

Additional Element 2:

Rating:

Additional Element 3:

Rating:

This section may be used to establish goals, objectives, projects or assignments for the coming year.

2020-21 Goal/Objective/Project/Assignment

2020-21 Goal/Objective/Project/Assignment

2020-21 Goal/Objective/Project/Assignment

This section details the individual's strengths and areas for development.

Individual's Areas of Strength:

Individual's Areas for Improvement (for current or future job):

Immediate Supervisor/Manager (SI)

You have now completed the final one performance review step.

- Please sign and date below to designate you have completed this step then click the next button below to review the summary page of all your responses.
- On the summary page you will click **Sign** to forward the document to your second-level supervisor for review and sign-off.
- You will be notified via e-mail from Employee Relations once you are authorized to meet with the employee to complete the review process. This should occur during the first week of March 27, 2021.
- DO NOT communicate any review results to employees prior to this notification from Employee Relations.

Today's Date

Choose Month

Choose Date

Your Name

1000's responses saved

2019-20 WUJ Annual Performance Review for

Return to First Page Previous Next **Sign** Unsign

Blue System - Standard Version

blue

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.

BlueDigital Security

Select Signing View [3.2] [v] [Sign] [Save]

Project Title: 2019-20 WU Annual Performance Review  
Approval of Filled for: [ ]  
Task Start Date: [ ]  
Task End Date: [ ]  
Signing Date: [ ]  
Status: [ ]

Second-Level Supervisor Comments: By typing your name in the box below you acknowledge that the performance evaluation has been completed. After typing your name, you must click the "Sign" button in the upper right corner of the page to complete the approval process.

2019-20 WU Annual Performance Review for [ ]

This section will determine if the person being evaluated is a Supervisor.

Does this employee have direct reports? [ ]

This section is for employees **WITH** direct reports.  
The questions will determine if the person being evaluated is a Supervisor.

Do you want to fill out the traditional style (rating questions) evaluation or the memo style (typing) evaluation? [ ]

Traditional [ ]

Job Knowledge [ ]  
Rating: [ ]  
Comment: [ ]

Customer Service [ ]  
Rating: [ ]  
Comment: [ ]

Teamwork/Ability to Work Well with Others [ ]  
Rating: [ ]  
Comment: [ ]

Accountability/Produces Quality Work [ ]  
Rating: [ ]  
Comment: [ ]

Communicates Well with Others [ ]  
Rating: [ ]  
Comment: [ ]

Proactive/Shows Initiative [ ]  
Rating: [ ]  
Comment: [ ]

Flexibility/Embraces Change [ ]  
Rating: [ ]

Achievement of Goals [ ]  
Rating: [ ]

Please enter your remarks. [ ]

Overall Rating [ ]  
Rating: [ ]  
Comment: [ ]

This section is for employees **WITHOUT** direct reports.  
The questions will determine if the person being evaluated is a Supervisor.

Do you want to fill out the traditional style (rating questions) evaluation or the memo style (typing) evaluation? [ ]

Builds a Strong Team/Hires and Retains the Right People [ ]

Productive/Action Oriented/Sense of Urgency/Plans Ahead [ ]

Makes Difficult Decisions with Department or University-wide Focus [ ]

Provides Effective Performance Management/Reviews, Develops Staff Appropriately, and has Attended all Required Training [ ]

Seeks Continuous Improvement/Simplifies/Reduces Bureaucracy/Embraces Change [ ]

Treats Others with Respect/Values Diversity of People and Ideas/Teamwork [ ]

Achievement of Goals [ ]

Please enter your remarks. [ ]

Overall Rating [ ]

Performance Elements for Job Specific Measures: Additional performance elements not included on this form may be added now.

- Space has been provided, and is designed to accommodate department-specific performance elements not covered by one of the performance elements listed on the form (which may be unique to this employee's job) as well as any measures related to compliance such as FERPA, HIPAA, NCAA, ethics, safety, state or federal regulations. This will reinforce accountability for these measures, which should be identified and discussed with the employee at the beginning of the performance review period.
- These elements are not required. If you do not wish to add additional elements, leave this page blank and click next.
- If adding elements, please type the name of the element you are rating (FERPA, HIPAA, ethics) and the details in the comment box and select a rating and/or priority element.

Rating: [ ]

Additional Element 2: [ ]  
Rating: [ ]

Additional Element 3: [ ]  
Rating: [ ]

This section may be used to establish goals, objectives, projects or assignments for the coming year.

2020-21 Goal/Objective/Project/Assignment [ ]

2020-21 Goal/Objective/Project/Assignment [ ]

2020-21 Goal/Objective/Project/Assignment [ ]

This section details the individual's strengths and areas for development.

Individual's Areas of Strength: [ ]

Individual's Areas for Improvement (for current or future job): [ ]

Immediate Supervisor/Manager (SI)  
You have now completed the level one performance review step.

- Please sign and date below to designate you have completed this step then click the next button below to review the summary page of all your responses.
- On the summary page you will click submit to forward the document to your second-level supervisor for review and sign-off.
- You will be notified via email from Employee Relations once you are authorized to meet with the employee to complete the review process. This should occur during the first week of March 27, 2021.
- **DO NOT communicate** any review results to employees prior to this notification from Employee Relations.

Employee Workplace Status [ ]

Today's Date [ ]  
Choose Month: [ ]  
Choose Date: [ ]  
Your Name [ ]

Performance Elements for Job Specific Measures: Additional performance elements not included on this form may be added now.

- Space has been provided, and is designed to accommodate department-specific performance elements not covered by one of the performance elements listed on the form (which may be unique to this employee's job) as well as any measures related to compliance such as FERPA, HIPAA, NCAA, ethics, safety, state or federal regulations. This will reinforce accountability for these measures, which should be identified and discussed with the employee at the beginning of the performance review period.
- These elements are not required. If you do not wish to add additional elements, leave this page blank and click next.
- If adding elements, please type the name of the element you are rating (FERPA, HIPAA, ethics) and the details in the comment box and select a rating and/or priority element.

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

This should only be completed after having the one-on-one meeting with your supervisor. Your report will be available in your dashboard under the reports tab shortly after the meeting. Please sign (type your name) and date. Comments are optional and will be sent to your supervisor for consideration.

Comments:

Today's Date

Choose Month  
[Month] ▼

Choose Day  
[Day] ▼

I acknowledge that this performance review was conducted to evaluate my performance and to discuss future performance and development plans. I further understand that my signing this review does not necessarily mean that I agree with the contents, and that I have access to a copy of my performance review report. I also understand that I have the opportunity to respond to this review with comments within 10 business days of the performance discussion and that this review is considered final 15 business days from the date it was delivered by my supervisor.

Enter your name (this is your electronic signature):  
[Text Input]

This page has been locked after Digital Signing.

Previous Next Save Submit

Progress 100%