ODU Division of Talent Management and Culture

PAPERS 7
SUPERVISOR GUIDE

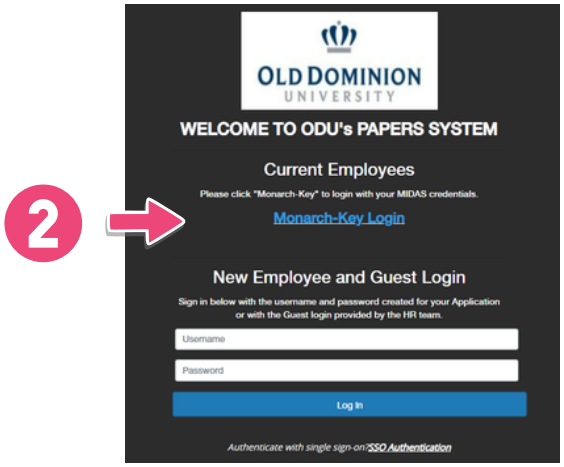
CREATING THE 2026 PERFORMANCE PLAN FOR NON-PROBATIONARY CLASSIFIED EMPLOYEES

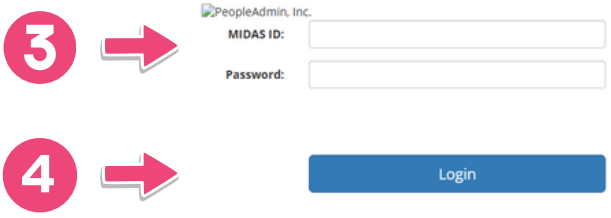
hrdept@odu.edu

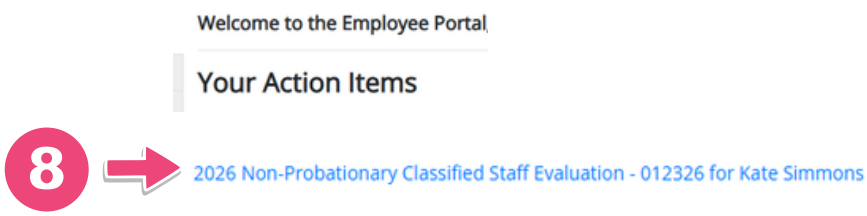
STEP BY STEP GUIDE

Note: For this guide a fictional employee (Kate Simmons) has been used to provide you with screenshots and instructions.

1. **Log** into PAPERS
2. **Click** on Monarch-Key Login link under Current Employees
3. **Enter** your Midas ID and Password
4. **Click** Login
5. **Click** on ellipses (upper left corner)
6. **Click** on Performance Management under Other Tools
7. **View** your Action Items
8. **Click** on the name of the employee's plan you will be creating
9. **Plan** will open up in PAPERS







Note: Your employee's name should appear under Your Action items. If the employee is not listed, contact hrdept@odu.edu.

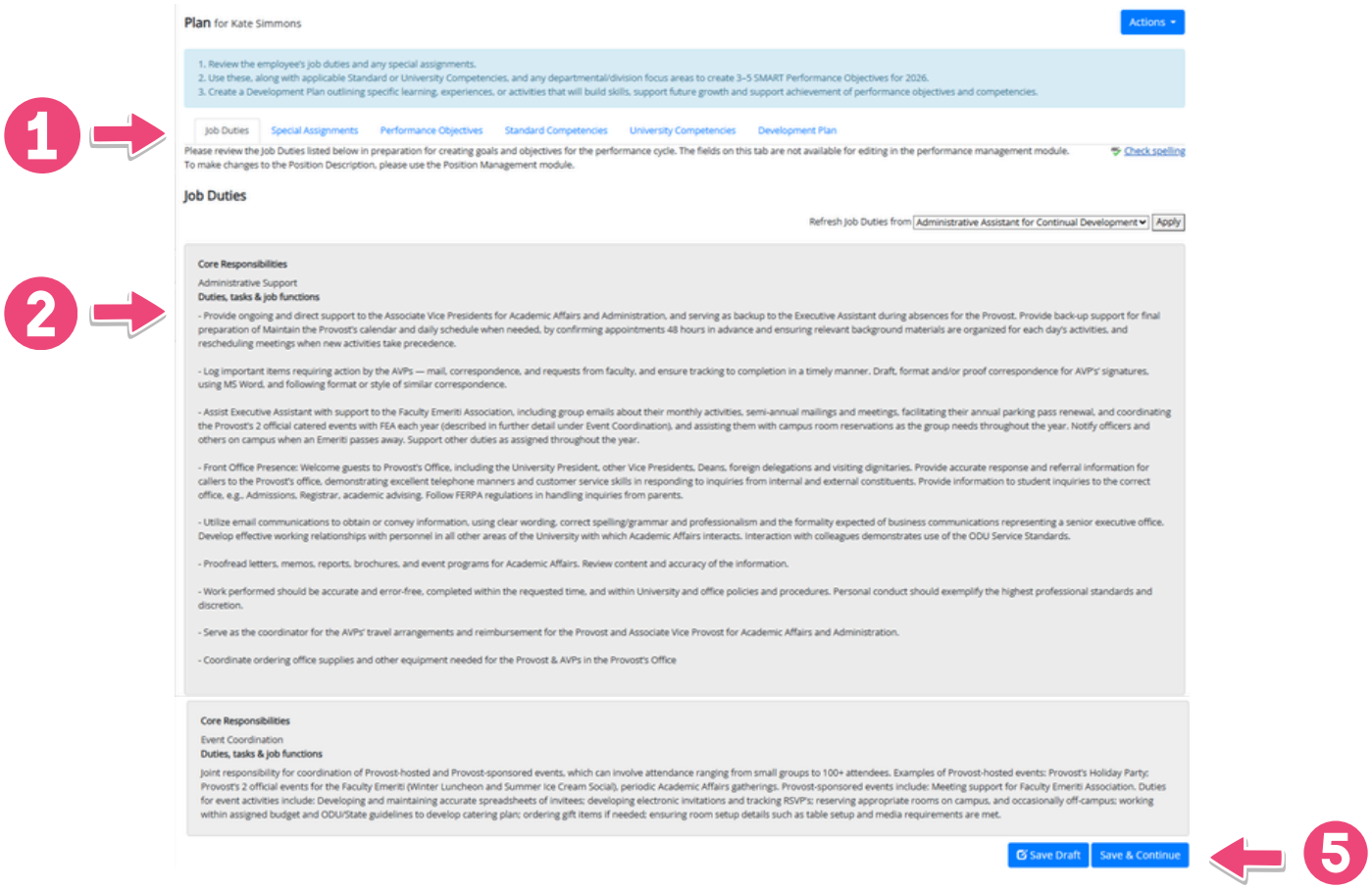
TAB - JOB DUTIES

TAB GUIDELINES

- Job duties are pulled directly from the Position Description (PD)
- **Directly inform the creation of Performance Objectives**
- Fields are view-only on this tab
- **Not rated** during the Evaluation Phase
- **Do not contribute to the automatically calculated overall performance rating**

STEPS IN PAPERS

1. **Click** on Job Duties tab
2. **Review** the job duties
3. **Confirm** they reflect the employee's core role
4. **Use** to create Performance Objectives and Development Plan
5. **Click** Save & Continue



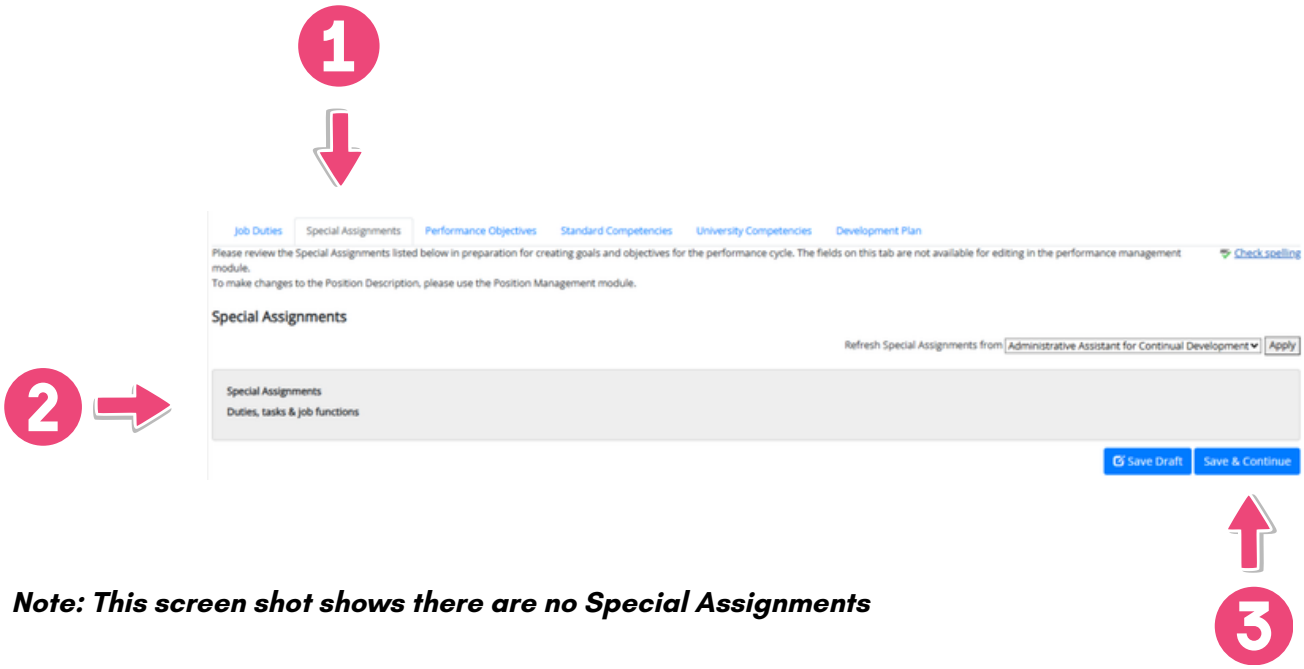
TAB - SPECIAL ASSIGNMENTS

TAB GUIDELINES

- Special assignments are pulled directly from the Position Description (PD)
- Fields are view-only on this tab
- **Not rated** during the Evaluation Phase
- **Do not contribute to the automatically calculated overall performance rating**
- Can inform the creation of Performance Objectives

STEPS IN PAPERS

1. **Click** on Special Assignments tab
2. **Review** any Special Assignments if populated from position desciption
3. **Click** Save & Continue



Note: This screen shot shows there are no Special Assignments

TAB - PERFORMANCE OBJECTIVES

TAB GUIDELINES

- Performance Objectives define the specific, results-focused outcomes a classified employee is expected to achieve during the performance cycle. These objectives translate job duties into measurable accomplishments that support unit and organizational goals.
- Developed by the supervisor in collaboration with the employee
- Aligned to the employee's Job Duties and departmental priorities
- Create a minimum of 3 to a maximum of 5
- Written as SMART objectives (Specific, Measurable, Achievable, Relevant, Time-bound)
- **Rated** during the Evaluation Phase
- **Contributes 80% of the automatically calculated overall performance rating**
    - **Each objective is assigned a weight, with all Performance Objectives totaling 80% of the overall performance rating**
- May inform the Employee Development Plan

WORKING EXAMPLE OF PERFORMANCE OBJECTIVE
Fictious employee Kate Simmons used for example

- Background- Kate is an Administrative Assistant for Continual Development in Academic Affairs
- One of her job duties is: Joint responsibility for coordination of Provost-hosted and Provost-sponsored events, including: Developing and maintaining invitation and RSVP tracking spreadsheets.
- Example of SMART performance objective:
    - By October 31, 2026, design and implement a standardized electronic invitation and RSVP tracking system using Microsoft Power Automate and related Microsoft tools to support Provost-sponsored events, resulting in improved accuracy for at least two events during the performance cycle.

HOW IS THIS OBJECTIVE SMART?

S – Specific

- The objective clearly defines what will be done:
    - Design and implement a standardized electronic invitation and RSVP tracking system
    - Use Microsoft Power Automate and related Microsoft tools
    - Apply it to Provost-sponsored events

M – Measurable (Key Distinction)

- Success is measurable in multiple concrete ways:
    - The system is designed and implemented (yes/no outcome)
    - It is used for at least two Provost-sponsored events
    - Visibility is improved by standardized tracking, allowing data to be reviewed and reported

A – Achievable

- The objective is realistic given:
    - Access to Microsoft tools already in use
    - Alignment with existing event coordination responsibilities
    - A defined scope (at least two events, not all events)

R – Relevant

- This objective directly supports:
    - Efficient coordination of Provost-sponsored events
    - Improved visibility and consistency in RSVP tracking
    - Broader institutional goals related to process improvement and effective use of technology

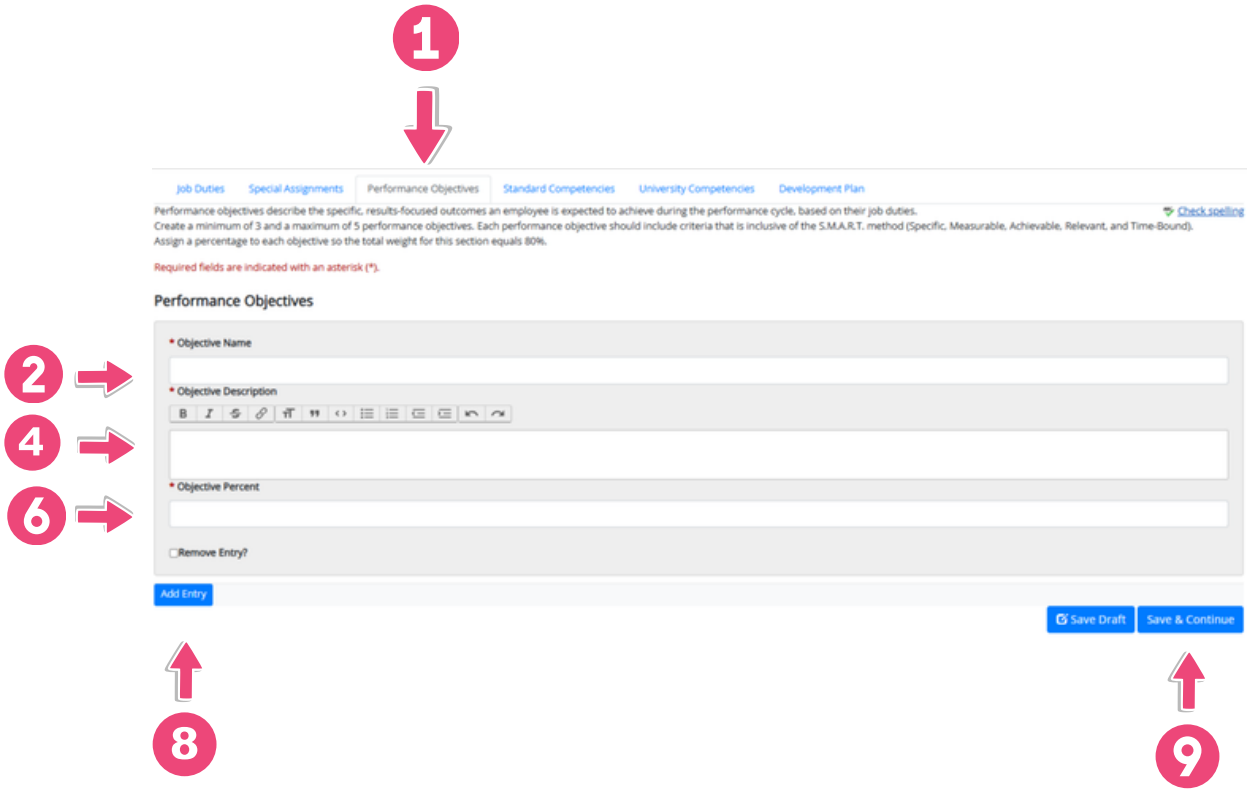
T – Time-Bound

- The objective includes a clear deadline: By October 31, 2026
- This establishes accountability and distinguishes it from ongoing work

TAB - PERFORMANCE OBJECTIVES

STEPS IN PAPERS

1. **Click** on Performance Objectives tab
2. **Click** on Objective Name field
3. **Enter** Objective Name
    a. Example: Event Invitation and RSVP Automation
4. **Click** on Objective Description
5. **Enter** Objective Description
    a. Example: By October 31, 2026, design and implement a standardized electronic invitation and RSVP tracking system using Microsoft Power Automate and related Microsoft tools to support Provost-sponsored events, resulting in improved accuracy for at least two events during the performance cycle.
6. **Click** on Obective Weight field
7. **Enter** Objective Weight in two digits
    a. Example: 30
        i. Weight will depend on how many objectives you are creating (3-5)
        ii. All objectives should total 80
        iii. Think about which objective has the greatest impact on unit or organizational success
        iv. Which objective requires the most effort, time, or complexity?
        v. If only one objective were fully achieved, which would matter most?
8. **Click** Add Entry
    a. Continue to enter 3-5 objectives
9. **Click** Save & Continue



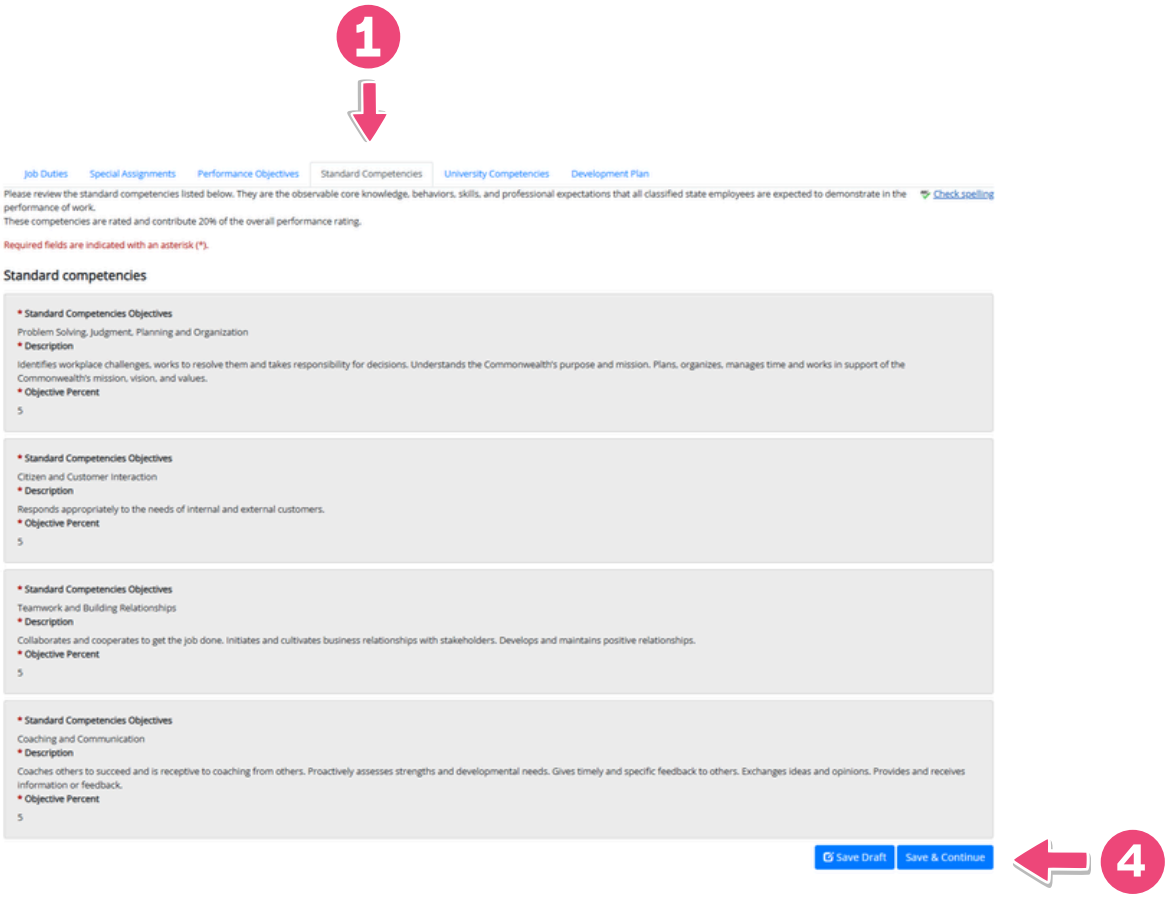
TAB - STANDARD COMPETENCIES

TAB GUIDELINES

- Standard Competencies are statewide expectations established by the State for classified employees. These competencies define core knowledge, skills, behaviors, and professional expectations required for effective performance across state service.
- Pulled directly from the Position Description (PD)
- Fields are view-only on this tab
- **Rated** during the Evaluation Phase
- **Contributes 20% of the automatically calculated overall performance rating.**
  - Each Standard Competency is weighted at a fixed value of 5%, as required by the state.
- Can inform the creation of Peformance Objectives and Development Plan

STEPS IN PAPERS

1. **Click** on Standard Competencies tab
2. **Review** Standard Competencies in order to provide the employee with clear expectations and consistent feedback on observable workplace behaviors
3. **Consider** comptencies in creation of Performance Objectives and Development Plan
4. **Click** Save & Continue



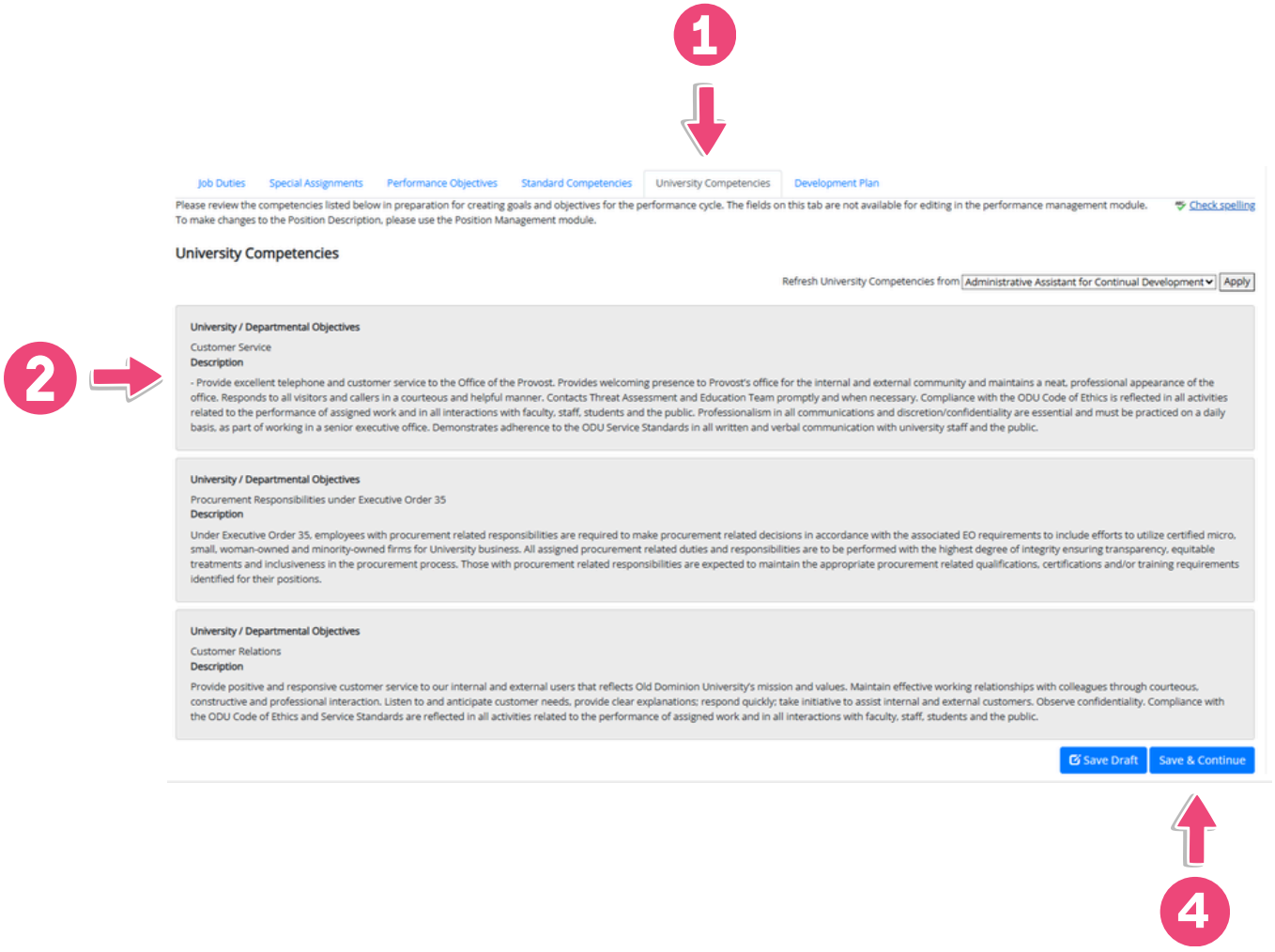
TAB - UNIVERSITY COMPETENCIES

TAB GUIDELINES

- University Competencies are pulled directly from the Position Description (PD)
- Fields are view-only on this tab
- **Not rated** during the Evaluation Phase
- **Do not contribute to the automatically calculated overall performance rating**
- Can inform the creation of Peformance Objectives and Development Plan

STEPS IN PAPERS

1. **Click** on University Comptencies tab
2. **Review** University Competencies in order to provide the employee with clear expectations and consistent feedback on observable workplace behaviors
3. **Consider** comptencies in creation of Performance Objectives and Development Plan
4. **Click** Save & Continue



TAB - DEVELOPMENT PLAN

TAB GUIDELINES

- The Employee Development Plan identifies skills, knowledge, or competencies the employee wants or needs to develop to support growth and successful performance. This section focuses on building future capability and supporting the employee's ability to meet performance objectives and evolving role expectations.
- Created collaboratively by the supervisor and employee
- May be informed by:
  - Job Duties or Performance Objectives
  - Special Assignments
  - Standard Competencies and University Competencies
  - Department priorities or focus areas for the year
  - Upcoming projects, initiatives, or operational changes
  - New systems, tools, or policies impacting the role
- Documents agreed-upon development goals, including activities, steps, and available resources
- Focused on growth and future capability, not corrective action or disciplinary measures
- **Not rated** during the Evaluation Phase
- **Does not contribute to the automatically calculated overall performance rating**

WORKING EXAMPLE OF EMPLOYEE DEVELOPMENT PLAN
Fictious employee Kate Simmons used for example

Development Name:
Power Automate-Based RSVP Tracking for Events

Development Description
Learning Goal: Build proficiency in Microsoft Power Automate and related Microsoft tools to support event coordination through improved invitation and RSVP tracking.

Learning Steps:

1. Complete LinkedIn Learning course: Power Automate Essential Training
2. Complete LinkedIn Learning course: Microsoft Forms Essential Training
3. Design and test an RSVP workflow using Microsoft Forms, Power Automate, and Excel or SharePoint
4. Implement the system for at least one Provost-hosted or Provost-sponsored event

Resources Needed:

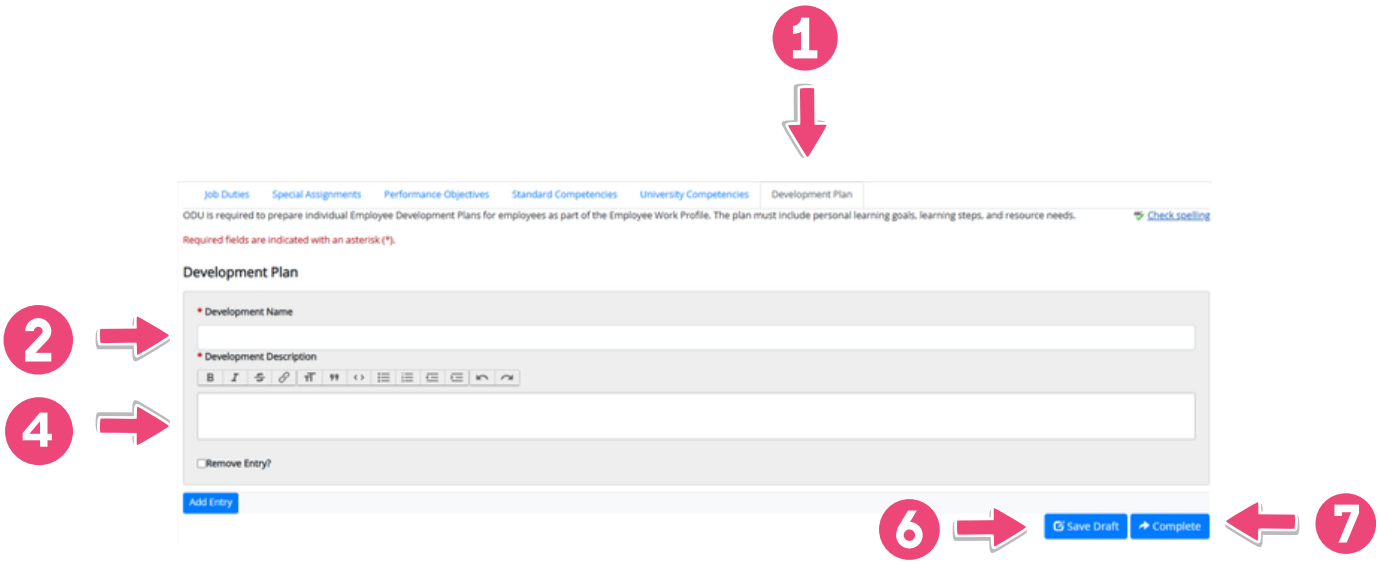
1. LinkedIn Learning access
2. Microsoft 365 tools
3. Time during work hours
4. Supervisor feedback during testing and implementation

Target Completion Date: October 31, 2026

TAB - DEVELOPMENT PLAN

STEPS IN PAPERS

1. **Click** on Development Plan Tab
2. **Click** on Development Name field
3. **Enter** Name of Development Plan
    a. Example: Power Automate-Based RSVP Tracking for Events
4. **Click** on Development Description field
5. **Enter** details of plan
    a. Example entry:
        - **Learning Goal:** Build proficiency in Microsoft Power Automate and related Microsoft tools to support event coordination through improved invitation and RSVP tracking.
        - **Learning Steps:**
            - Complete LinkedIn Learning course: Power Automate Essential Training
            - Complete LinkedIn Learning course: Microsoft Forms Essential Training
            - Design and test an RSVP workflow using Microsoft Forms, Power Automate, and Excel or SharePoint
            - Implement the system for at least one Provost-hosted or Provost-sponsored event
        - **Resources Needed:**
            - – LinkedIn Learning access
            - – Microsoft 365 tools
            - – Time during work hours
            - – Supervisor feedback during testing and implementation
    i. Target Completion Date: September 30, 2026
6. **Click** Save Draft to do a final review of entire performance plan by checking each tab
7. **Click** Complete when ready to submit plan to Reviewer

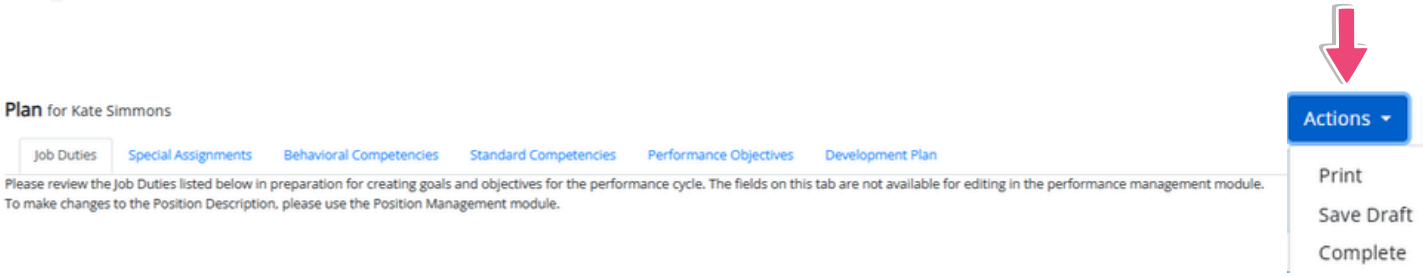


STEP: PAPERS AUTOMATICALLY ROUTES TO REVIEWER

- The reviewer (typically your immediate supervisor) will receive an email notifying them of an action item due in PAPERS
- The reviewer will either suggest Edits or Approve the plan
- If Approved, PAPERS routes plan to employee to acknowledge
- If Edits required, PAPERS routes plan back to supervisors

Plan Approved

- If the Reviewer approved the plan with no edits, PAPERS ***will route the plan back to the employee for acknowledgement.***
- Schedule meeting with employee to review and discuss the plan before employee formally acknowledges the plan in PAPERS.
- Click on **Actions** dropdown button and choose **Print** to print a copy of the plan to review and share.



Plan Returned for Edits

- The plan will return to your queue in PAPERS, you will be will be notified by email.
- Access the employee's plan.
- Reviewer comments will be visible above tabs.
- Process edits needed in appropriate tabs
- Click Save and Continue under the tab you are working on
- Click on Actions dropdown button
- Click on Complete
- The cycle will begin again > Plan routes to Reviewer > Reviewer Approves > Plan routed to Employee to Acknowledge

STEP: EMPLOYEE ACKNOWLEDGES PLAN

After reviewer approval, PAPERS automatically routes the plan to the employee for acknowledgment. Supervisors are expected to meet with the employee to discuss the new performance plan **before the employee completes the acknowledgment step in PAPERS.**

If an employee wishes to appeal the plan, they should contact:
HR Services Team | 757-683-3042 | employeerelations@odu.edu