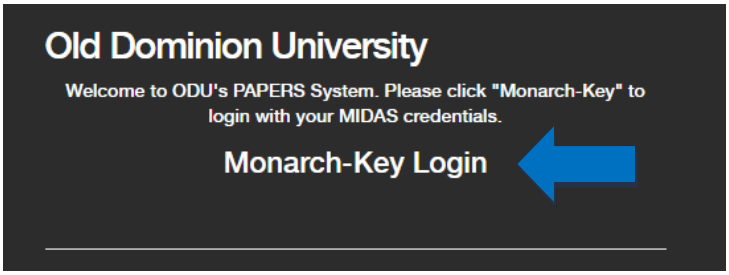
PAPERS User Guide: PERFORMANCE PLAN CLASSIFIED EMPLOYEES

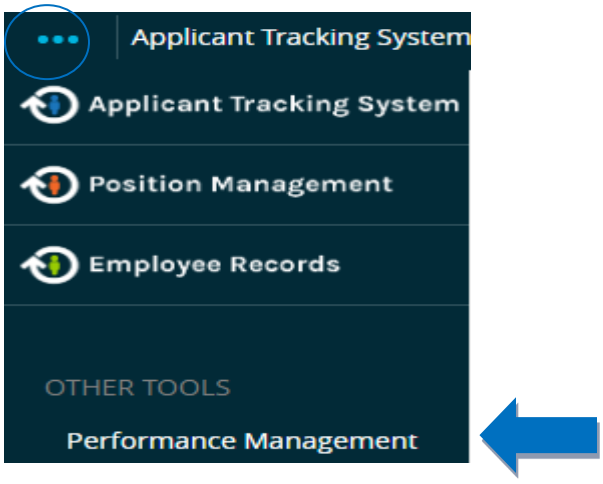
Getting Started

- Start at the Human Resources home page: https://www.odu.edu/humanresources

  - Select the **PAPERS** link on the right side of the page
  - Select **Login PAPERS System**
  - Click **Monarch-Key Login**
  - Use your Midas ID and Password to login



- Click the three dots and select **Performance Management**

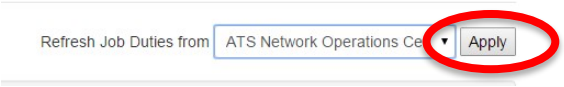


Creating the Performance Plan (Supervisor)

- Select **Manager Creates Plan**

- From this point the supervisor will be able to view the core responsibilities from the position description. Use the material on this tab to formulate ideas for performance goals.

NOTE: Prior to starting a performance plan be sure to "refresh" the job duties. While drafting the plan, a menu option to refresh job duties will be available on the right side of the screen. Select the correct job title and select "apply." All tabs must be refreshed individually. If you see inaccurate information after refreshing please notify Employee Relations at 3-3394 or 3-3046.



- To access the performance goals tab select **Next** at the bottom of the page, or select the **Performance Goals** tab at the top of the page.

- To add performance goals, type a goal name then enter a description of the goal and how the employee will achieve this goal. Be sure to include expectations, the desired outcome, and how to achieve the desired outcome. Develop at least two to four goals for each employee, depending on the core responsibilities in the position description.

Sample Goals:

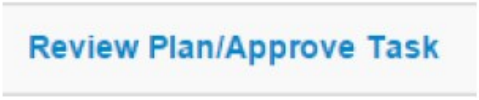
- Uphold and demonstrate the ODU Services Standards and conduct all business in a professional, ethical, respectful, knowledgeable, responsive, and collaborative manner.
- Maintain the highest level of ethical standards and adhere to the ODU Code of Ethics in all ODU related activities. Seek assistance or guidance from management when in doubt.
- Adhere to and abide by all university policies and procedures, specifically the Standards of Conduct Policy 1.60. Request clarification and explanation whenever needed to ensure that all work related activities are in line with university policies and procedures.

- When all performance goals have been entered, select **Next** at the bottom of the page or navigate through the special assignments and behavioral competencies tabs at the top.

- On the behavioral competencies tab select **Complete** at the bottom of the page to automatically route the performance plan to the reviewer.

Reviewing the Performance Plan (Reviewer)

- The reviewer will receive an email notification that there is an action item in PAPERS which needs to be completed. Once logged in, select **Review Plan/Approve Task** to review the performance plan.



- The page will contain the employee's job duties, performance goals, special assignments, and behavioral competencies for review.
    - The only field available for editing is the "Comment" section at the bottom of the page. Reviewers cannot make changes to the job duties, special assignments, or behavioral competencies.
    - If the reviewer agrees with the performance goals, select **Approve** at the bottom of the page.
    - If the reviewer is requesting changes to the performance goals, enter the desired changes in the **Comment** field and select **Return** at the bottom of the page.
    - Both **Approve** and **Return** will route the performance plan to the supervisor. **Only Approve** will allow the supervisor to then route the plan to the employee for discussion.

Performance Plan Returned to Supervisor for Changes

- Review any comments made by the reviewer
- Discuss changes with the reviewer as needed
- Make changes
- On the behavioral competencies tab select **Complete** at the bottom of the page. Selecting **Complete** will automatically route the performance plan back to the reviewer.

Performance Plan Approved

- When the performance plan has been approved by the reviewer and returned to the supervisor's queue, the supervisor will have the option to "Route Plan to Employee." By selecting "Complete" on this page, the plan will automatically route to the employee.

- Supervisor meets with the employee to discuss the performance plan and routes the performance plan to the employee.

Employee Acknowledges Plan

- After the supervisor and employee discuss the performance plan, the employee acknowledges the plan.
  - The following text will appear above the performance plan on the employee's page: "Your supervisor has created the Performance Plan below based on your position description. Please acknowledge the plan after you have met with your supervisor to discuss."
  - The employee may add comments and acknowledges the plan by selecting **Acknowledge** at the bottom of the page.