This guide will assist staff members with using the performance management system to complete online staff performance evaluations.

**Login**
In order to access the *Staff Online Performance Management System*, please visit [https://forms.luc.edu/performance/login](https://forms.luc.edu/performance/login).

- Staff members can access the system with their Loyola Username and Password (on or off-campus).
- If you have trouble logging into the application, please visit Password Self-Service ([luc.edu/password](https://luc.edu/password)) in order to change your password.
Getting Started
The initial view of your account should reflect the example shown below. In the left pane, you will notice the following:

- **Home** - You are routed to the main screen (shown below).
- **My Annual Reviews** - You can review your personal performance review.
- **Training Materials** - You can access tutorials designed to help you navigate the performance evaluation application.

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**My Current Review**
Supervisors must first initiate the performance evaluation for their staff. Until completed, when a staff member logs into their account, they will receive a message stating the performance evaluation has yet to be initiated, as shown below.
**Start the Performance Evaluation**
Once a Supervisor initiates the performance evaluation, a staff member can login to their account in order to begin completing the form.

**Overview and Staff Member Detail**
When a staff member opens their performance evaluation, the initial view will reflect an overview of the staff member’s employment information, as shown below.

- **Current Evaluation Period:** This reflects the university evaluation timeframe enacted by Human Resources.
- **Supervisor Evaluation Period:** This reflects the Supervisor's timeframe they have earmarked for the staff member's performance evaluation.
Step 1

Step 1 of the performance evaluation requires the staff member to enter comments regarding their job description and responsibilities. Once the staff member enters their comments, they can either select "Save Progress" to return to the performance evaluation later, or "Continue to Goals."

- Please note: When the Supervisor receives the performance review (from the staff member), they will update Step 1 with their rating and comments. The staff member can then review this information when the performance evaluation is returned for their review/sign-off.
Step 2
Step 2 of the performance evaluation requires the staff member to enter comments regarding their job goals and accomplishments. If necessary, goals can be added. When the Supervisor receives the performance review, they will update Step 2 with their rating and comments.

- Please note: When selecting the "+" in Step 2, staff members can upload relevant materials for their performance evaluation. Supervisor comments can be reviewed once the Supervisor receives the performance evaluation after the staff member has an opportunity to complete the form.
Step 3
Step 3 of the performance evaluation requires the staff member to enter comments regarding competencies and strategic objectives related to their role. When the Supervisor receives the performance review, they will update Step 2 with their rating and comments.

- Supervisors will complete the Strategic and University Objectives section. However, both the staff member and Supervisor can enter individual goals within the section.
- Please note: Predefined "Behaviors" are entered by Human Resources for all staff members, as shown below.

Supervisor comments can be reviewed once the Supervisor receives the performance evaluation after the staff member has an opportunity to complete the form. This information can be found within the "+" area labeled as View Comment.
Step 4 of the performance evaluation requires the staff member to enter additional comments and/or attachments regarding their performance during the annual review period. In addition, compliance information can be entered (as appropriate).
**Sign-Off**
Step 5 of the performance evaluation permits the staff member to send the form to their Supervisor for review. Once this process takes place, the Supervisor will receive an electronic notification that they can review the performance evaluation and if necessary, send the form back to the staff member for follow-up/sign-off.

- Please note: If a staff member attempts to send an incomplete performance evaluation to their Supervisor, a prompt will appear to inform the staff member to complete the missing information. The appropriate step that the needs to be completed will appear, as shown below. Once the form is updated, the staff member

**Performance Evaluations Requiring Secondary Approvals**
Once a performance review has been completed by both the staff member and the Supervisor, the Supervisor can send the review to the second level reviewer for approval. Within the Team Dashboard, the section titled "Performance Evaluations requiring Secondary Approvals" appears, as shown below.

**Performance Review Meeting**
Your Supervisor will scheduled a meeting with you to discuss your performance evaluation, including any job responsibilities, goals, and/or compliance information that may need to be added.
**Human Resources - Performance Review Cancellation**

If necessary, Human Resources may cancel a performance review. If this takes place, the staff member, and first and second level Supervisor's are electronically notified.

- First level sign-off = Supervisor
- Second level sign-off = Division VP

**Questions?**

If you have additional questions on how to use the *Staff Online Performance Management System*, please email [hr-training@luc.edu](mailto:hr-training@luc.edu).