



PERFORMANCE MANAGEMENT AT DU

PERFORMANCE PLANNING USER GUIDE

FOR MANAGERS

LOGGING IN

1. Log into [PioneerWeb](#)
2. Under the Employee Tab, in the My Resources box, click on the Pioneer@Work link.
3. Enter your DU credentials (firstname.lastname@du.edu and password) which will bring you to the home screen where you can see your performance management tasks.

The screenshot shows the Pioneer@Work interface. At the top left is the Pioneer@Work logo. Below it is a search bar and a hamburger menu icon. The main content area is divided into two sections: 'Your Action Items' and 'Special Announcements'.

Your Action Items	
	Due Date
Open: Preventing Harassment & Discrimination (Supervisors)	5/17/2020
2020-2021 Performance Planning for Lori Learner	5/10/2021
View: Supervisor Core Competencies II (Starts 10/2/2020 9:00 AM)	None
Mark Complete: How to Request a Training Exemption	None
Launch: Managing Bias	None
Open: 2020-21: University Policies & Guidelines	None

Special Announcements

UPDATE Performance Planning for 20-21 opens on April 5

HRIC has been working with divisional leaders to elevate the impactful work that staff have been engaged in throughout the entire year. Documenting the tremendous accomplishments and meaningful work of our staff and administrators is more important than ever. As such, we have adapted our performance management forms to allow all goals to align to divisional goals and 5 Strategic Imperatives. Please look for an email from performance@du.edu to begin entering goals for the 20-21 performance management year on April 5th. You will have six weeks to complete the performance planning process of goal setting with a due date of May 15th.

For additional information or FAQs on performance management for this year please visit [Performance Management Website](#).

SYSTEM NAVIGATION

- To return to the Home screen at any time, click on the Pioneer@Work logo at the top left.
- Utilize the “Your Action Items” section to engage with all active tasks throughout the Performance cycle.
- Click “View your Profile” to view your Bio, Actions and a Snapshot of your progress.
- Click “View Goals” to view the items in the Job Goals and Objectives, once created.
- This navigation is also accessible through the hamburger menu at the top right.
- Throughout the process, you have the option to select Back to return to the previous screen, select Save and Exit to exit the system, or select Save and Continue to progress to the next section.

PERFORMANCE PLANNING IS A 3 STEP PROCESS:

Review Step Progression

	Performance Planning Due: 4/23/2021		Employee drafts their own Performance Plan including: drafting Job Goals and Objectives; reviewing Competencies and creating a Professional Development plan.
	Manager Review		Manager reviews and has the opportunity to modify the employee’s Performance Plan.
	Employee Acknowledgement		Employee reviews any modifications and then acknowledges by signing off.



BEGIN MANAGER REVIEW

1. Click on the **PERFORMANCE PLANNING** task for each direct report.

Your Action Items		Due Date
Open: Preventing Harassment & Discrimination (Supervisors)		5/17/2020
2020-2021 Performance Planning for Lori Learner		5/10/2021
View: Supervisor Core Competencies II (Starts 10/2/2020 9:00 AM)		None

*Note: In the event that you want to assign another reviewer to complete the Manager Review of your direct reports' Performance Plan click on the "Options" menu and select **ADD CO-PLANNERS**. Search by name and click Save.*

*Note: You have the ability to attach your job description. If you would like to do so, click on the "Options" menu and select **ATTACHMENTS**. Click on "Choose File" to add up to 3 Adobe PDF files or Word documents up to 1MB each. To finish attaching, click Save.*

Options ▾

- Add Co-Planners
- Attachments
- Print Review
- Print Reviewee Version

2. Read the "Overview".
3. Click **Get Started** at the bottom of the page to begin entering job goals and objectives

*Note: To send the Performance Plan back to the employee for revisions, click **Reopen Step***

Reopen Previous Review Step ✕

You may only reopen 1 review step at a time. Only steps that have a status of Complete or Past Due will appear.

Performance Planning

Comment for reviewer

Select "Performance Planning" and enter a comment with instructions for your direct report. Click Save.



VIEW AND ASSIGN GOALS TO YOUR TEAM AFTER YOUR GOALS HAVE BEEN CREATED

1. From the homepage, click locate the “Your Goals” widget and click on



2. To see each of your direct reports Job Goals and Objectives, click on the “Team Job Goals and Objectives” tab and then the red arrow next to the employee's name.

NOTE: Your direct reports must have completed the entire performance planning process in order for their goals and objectives to appear.

Team Job Goals and Objectives



My Job Goals and Object... **Team Job Goals and Obj...** Hierarchy

Current Period: 10/1/2020 9/30/2021 Search

Display Canceled Hide Completed

All Statuses

Lenny Learner No Job Goals and Objectives in the current period

Lori Learner >

3. To create a new Job Goal and Objective, click **Create** and fill in each of the fields (e.g. Title, Due Date, etc). The Due Date will default to today's date. Be sure to select one (or multiple) of the DU Strategic Imperatives. If your goal does not correspond to one, choose “N/A”. To learn more about the Strategic Imperatives, click [HERE](#).

Start Date: 3/25/2021 Due Date*: 9/30/2021

DU's Strategic Imperatives *

Select options

- Select All
- 1 - Ensure a bold, sustainable future through our financial, reputational, and operational practices
- 2 - Create a unique global, holistic, '4D' student experience
- 3 - Cultivate an exceptionally diverse, inclusive, equitable, and welcoming community
- 4 - Define and model a global, engaged research university
- 5 - Ensure academic excellence with a signature portfolio of academic programs
- 6 - N/A

4. Under Assignment* (this is required) , you can select either “Yourself” to add an item to your own Job Goals and Objectives OR you can select “Your Team” to assign a Job Goal and Objectives to everyone on your team OR select members of your team by checking the box next to individuals' names.

Assignment *

Select which users this goal should be assigned to.

Yourself Your team

<input type="checkbox"/>	Name	Title	Direct and Indirect Reports <input type="checkbox"/>
<input type="checkbox"/>	Susie Supervisor		
<input type="checkbox"/>	Lenny Learner		
<input type="checkbox"/>	Lori Learner		

5. You can also select, “Direct and Indirect Reports” to assign Job Goals and Objectives to others under you in the organizational chart.

6. To complete assigning a Job Goal and Objectives to your team or select members of your team, click **Submit** Once submitted, this item will display on the assignee's homepage under “Your Action Items”.



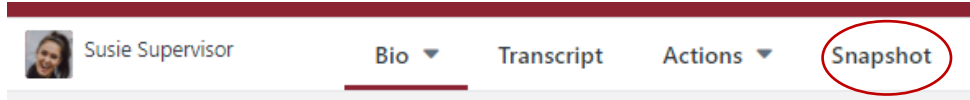


TO VIEW STATUS OF GOALS AND DEVELOPMENT PLAN PROGRESS

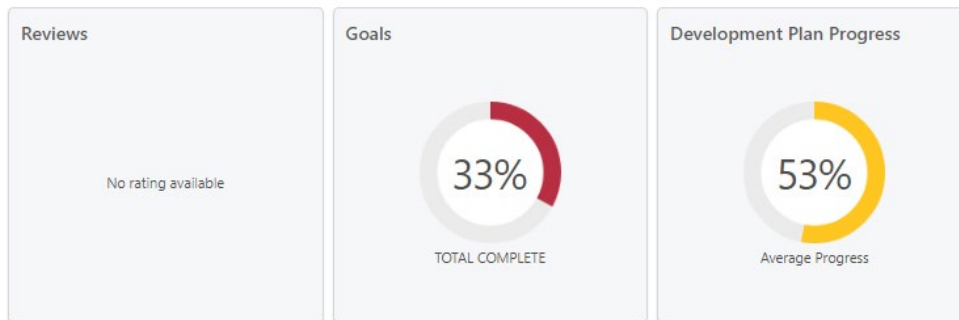
1. Locate the “Your Profile” widget on the homepage and click on



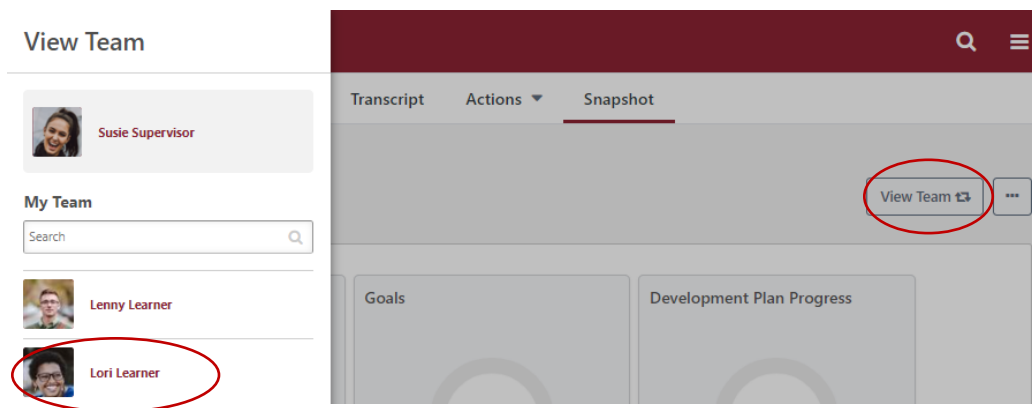
2. Click on on Snapshot.



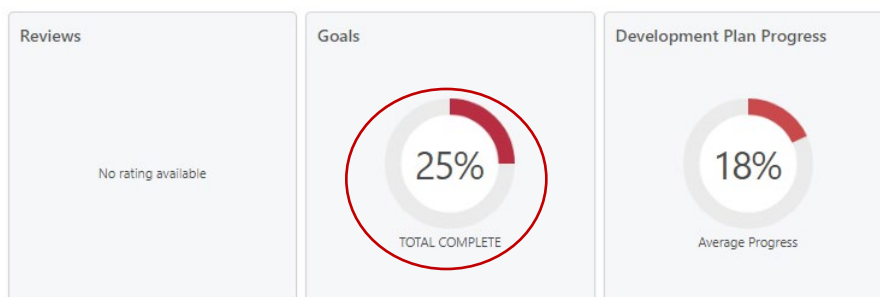
3. You can view your development plan progress and goal completion progress.



4. To see a list of your direct reports and to view their snapshot view, click “View Team” and select the employee you want to view.



5. Click on the area you wish to review in more detail.



QUESTIONS? Reach out to performancemanagement@du.edu