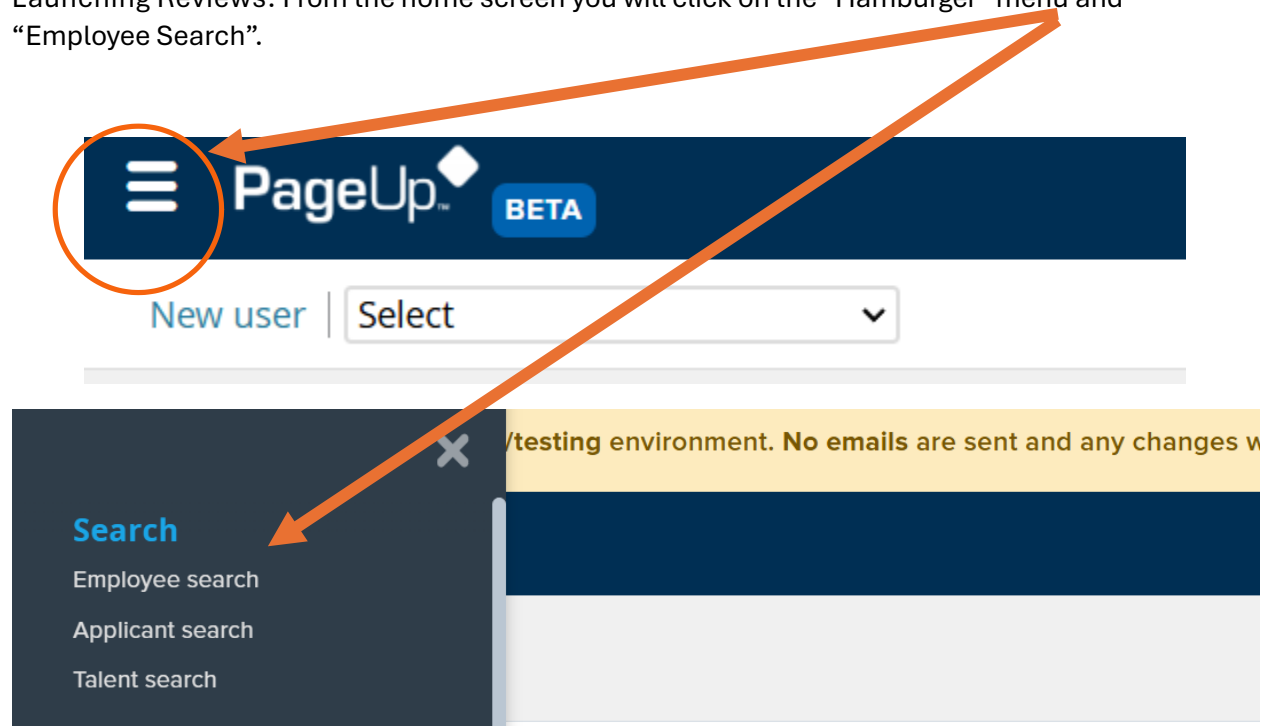


Performance Job Aid: Performance Administrator - Launching and Archiving Annual and Probationary Reviews

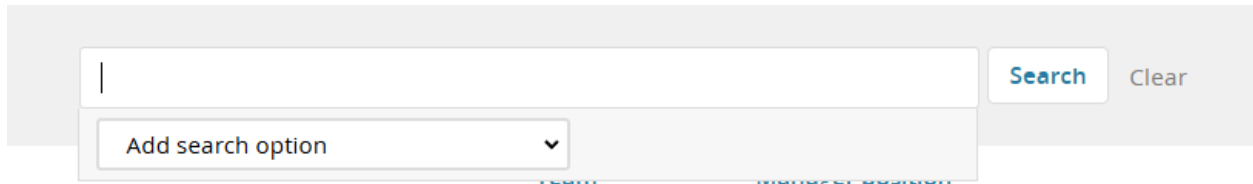
As a Performance Admin, you can Launch and Archive Reviews, as well as update statuses. These may be processed on an individual basis or a bulk process. For a more detailed explanation of the “Employee Search” screen see the “Employee Search” Job Aid. To access the Employee search and Performance Center use these links: [COV Network Users](#) and [Non-COV Network Users](#).

Launching Reviews: From the home screen you will click on the “Hamburger” menu and “Employee Search”.

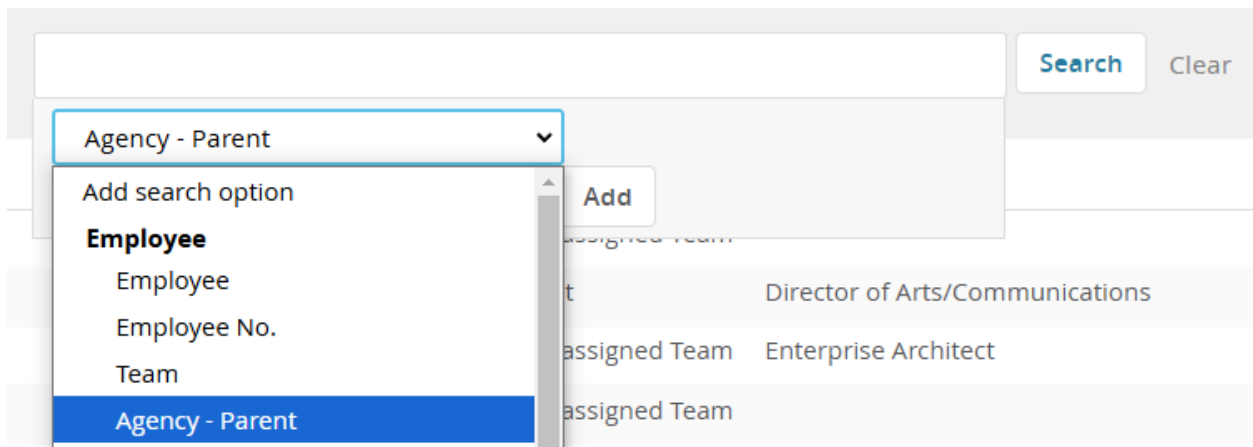


Individual Launch

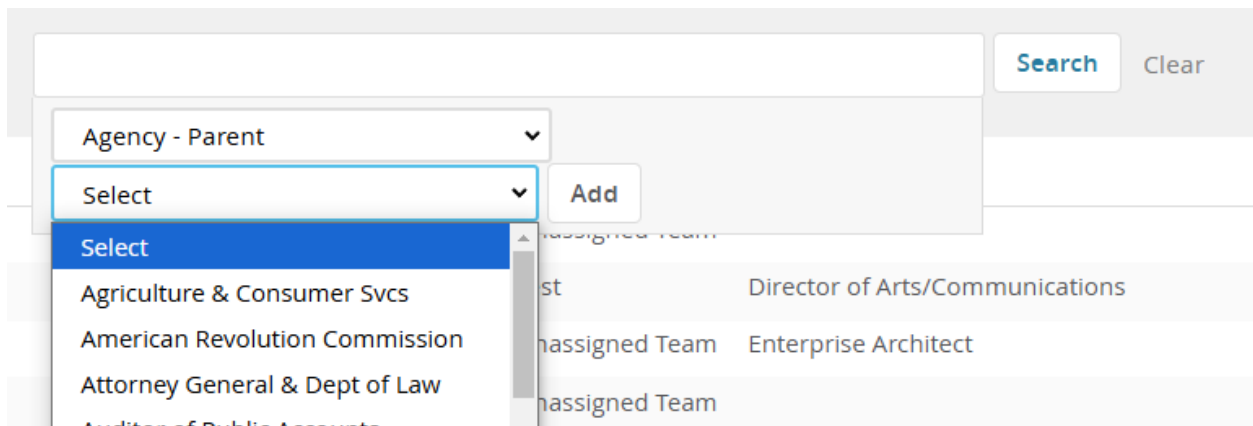
1. To complete a launch for an individual, begin your search by clicking in the search box and clicking the “Add Search Option” box. Add “Agency – Parent” or “Agency” search criteria. Then select your agency.



This screenshot shows the top of the search interface. It features a search box with a vertical cursor, a 'Search' button, and a 'Clear' button. Below the search box is a dropdown menu labeled 'Add search option' with a downward arrow.



This screenshot shows the 'Add search option' dropdown menu open. The menu has a search bar and an 'Add' button. The first option, 'Agency - Parent', is selected and highlighted in blue. Other options listed include 'Employee', 'Employee No.', and 'Team'.



This screenshot shows the 'Add search option' dropdown menu open. The menu has a search bar and an 'Add' button. The first option, 'Select', is selected and highlighted in blue. Other options listed include 'Agriculture & Consumer Svcs', 'American Revolution Commission', 'Attorney General & Dept of Law', and 'Auditor of Public Accounts'.

2. Type in the name you are looking for in the Search box.

Employee search

Agency - Parent: Test Agency harry hire Search Clear

Select	First name	Last name	Email address	Team	Position title	Role	Manager position
☐	Harry	Hire	jamie.norman+padmin@dhrm.virginia.gov	Test	Associate Professor of Arts/Communications	Director of Arts/Communications	

3. Utilize the box to the left of the employee's name to select the employees.

Employee search

Select First name Last name

☐ Harry Hire

4. In the top left of the screen, you will see a "Select" drop down box, select "Bulk New Performance Review".

New user | Select

Employee

Select

Bulk new: Performance review

Select First name Last name

☒ Harry Hire

5. FOR ANNUAL REVIEW PROCESS: Start Date is the date you initiate the review and End Date must be February 1 of the following year e.g. 2026 performance review end date should be 02/01/2027. Check the boxes for “Automatically Assign Manager” and “Automatically Assign 1-up Manager” or you can manually enter the names. Then “Save”.

FOR PROBATIONARY PERIOD PROCESS: Start Date must be the new hire’s Start Date in Cardinal and the End date will automatically populate. Do not adjust the end date for probationary review. For example, new hire starts on 4/10/2026, HR doesn’t initiate the review until 4/20/2026. HR enters 4/10/2026 as the review Start Date. Check the boxes for “Automatically Assign Manager” and “Automatically Assign 1-up Manager” or you can manually enter the names. Then “Save”.

Bulk action status: 1 Employee Complete

You have invited 1 person to complete a performance review.

Start date:*

Review process:*

Review end date:*

Manager:

☐ Automatically assign manager to the performance review?

1-up manager:

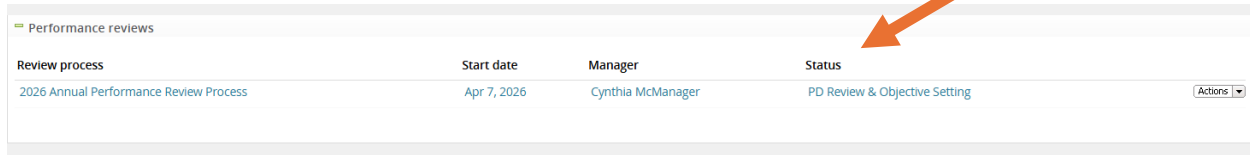
☐ Automatically assign one-up manager to the performance review?

☐ Only use occupied positions when assigning managers and 1-up managers to reviews?

☐ Include job duties from position descriptions?

Please note that dependant on how many review invitations are to be created, this may take a long time. After clicking 'Save', you will be unable to navigate away from this page until the process has been completed.

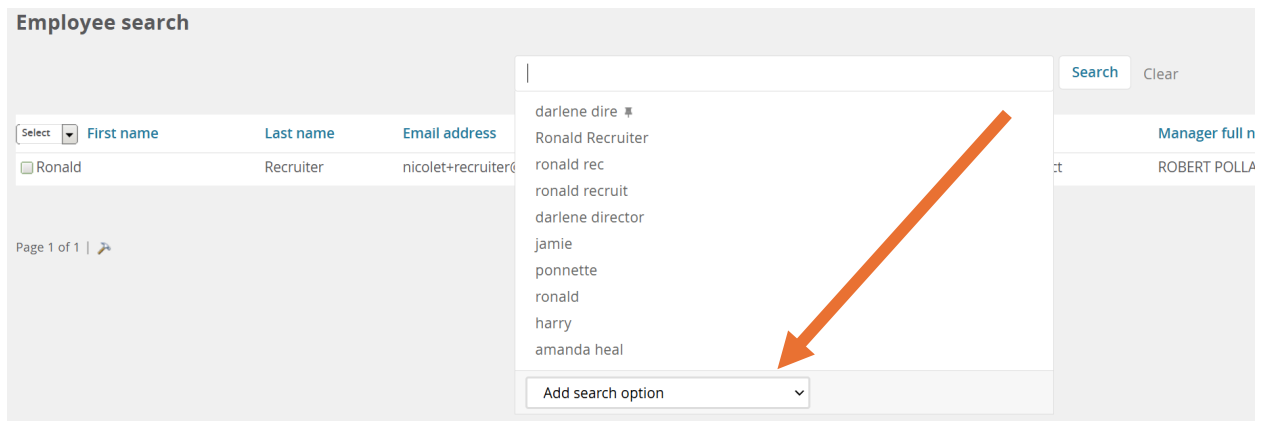
6. Once the Performance Review Process is launched, you'll be able to see the review on the employee card under "Performance Reviews."



Performance reviews			
Review process	Start date	Manager	Status
2026 Annual Performance Review Process	Apr 7, 2026	Cynthia McManager	PD Review & Objective Setting

Bulk Launch

1. To bulk launch, return to the Employee Search Screen. Use Parent Agency or Agency as your desired criteria in the "Search" Box to bring up a list of employees. See Employee Search job aid for additional instructions on searching by Agency.



Employee search

Select First name Last name Email address

Ronald Recruiter nicole+recruiter@... Manager full n ROBERT POLLAR

Page 1 of 1

Search Clear

darlene dire
Ronald Recruiter
ronald rec
ronald recruit
darlene director
jamie
ponnette
ronald
harry
amanda heal

Add search option

- You may select employees by checking individual boxes or use the “All Pages” or “Current Page” feature to check the entire group. After making your selections, select from the menu located under the PageUp Logo click the “Select Box” and choose “Bulk New: Performance Review”

New user | Select ▼

- Select
- Bulk communicate
- Bulk new: Performance review**

Employee search

Agency - Parent: Test Agency Search Clear

Select	First name	Last name	Email address	Team	Position title	Role	Manager position
☐	Harry	Hire	jamie.norman+harryhire@dhrm.virginia.gov	Test	Associate Professor of Arts/Communications	Director of Arts/Communications	
☐	Ronald	Recruiter	nicolet+recruiter@pageuppeople.com	Test	Test Position 1		
☐	Darlene	Director	nicolet+hmlevel2@pageuppeople.com	Test			

Select records:
☒ All pages
☒ Current page
☐ Clear all selections

Page 1 of 1 |

- FOR ANNUAL REVIEW PROCESS:** Start Date is the date you initiate the review and End Date must be February 1 of the following year e.g. 2026 performance review end date should be 02/01/2027. Check the boxes for “Automatically Assign Manager” and “Automatically Assign 1-up Manager” or you can manually enter the names. Then “Save”.

FOR PROBATIONARY PERIOD PROCESS: Start Date must be the new hire’s Start Date in Cardinal and the End date will automatically populate. Do not adjust the end date for probationary review. For example, new hire starts on 4/10/2026, HR doesn’t initiate the review until 4/20/2026. HR enters 4/10/2026 as the review Start Date. Check the boxes for “Automatically Assign Manager” and “Automatically Assign 1-up Manager” or you can manually enter the names. Then “Save”.

Bulk action status: 1 Employee Complete

You have invited 1 person to complete a performance review.

Start date:*

Review process:*

Review end date:*

Manager:*

☐ Automatically assign manager to the performance review?

1-up manager:

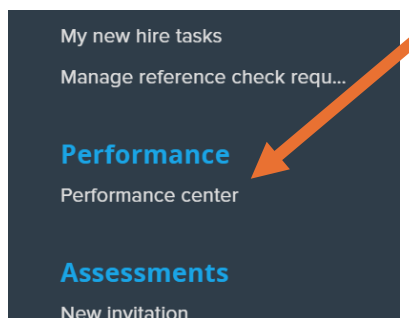
☐ Automatically assign one-up manager to the performance review?

☐ Only use occupied positions when assigning managers and 1-up managers to reviews?

☐ Include job duties from position descriptions?

Please note that dependant on how many review invitations are to be created, this may take a long time. After clicking 'Save', you will be unable to navigate away from this page until the process has been completed.

- The system will take a moment to process LARGE bulk launches, so please be patient. You can check the status of bulk requests as well as all Performance Reviews by clicking on the “Hamburger” menu in the top left of the screen and selecting the “Performance Center.”



5. Within the Performance Center you can see all launched Performance Reviews or view any Bulk Processes. Note: You cannot launch reviews from Performance Center. Reviews are launched using Employee search. Bulk actions are completed the same way as the Employee Search using the search feature and making the necessary selections.

Performance center



Performance reviews

View a list of the performance reviews you have initiated.



Roles

View a list of roles



Manage Bulk Processes

View a list of bulk processes that you have initiated and their status

6. When you go into Bulk Processes, you'll see a list of any processes launched in bulk (creating, archiving, etc). You can see the totals, whether they are completed or still running, and more.

Manage Bulk Processes



Type	Created on	Completed	Total	Successful	Failures	
Create review	18 Nov 2024 5:01pm	Yes	1	1	0	View
Create review	18 Nov 2024 2:18pm	Yes	4	4	0	View
Create review	18 Nov 2024 2:11pm	Yes	1	1	0	View
Delete review	18 Nov 2024 11:16am	Yes	1	1	0	View

- Return to the Performance Center and select Performance Reviews. The screen is similar to that of Employee Search, except this screen displays Performance Reviews that have been launched.

PageUp BETA

Back | Import Excel file | Please select a bulk action ▾

Performance reviews

Please select a bulk action

- Bulk communicate
- Bulk status change
- Bulk add section
- Bulk delete
- Bulk archive
- Bulk unarchive

Select ▾ Review process

Employee No.	Review Manager	Status	Start date
Annual Evaluation- Self E Employee	Performanc	Manager Perform	Employee comp Feb 8, 20
DHRM Annual Performar Employee	Performanc	Manager Perform	PD (EWP) Review Feb 8, 20
DHRM Annual Performar Harry	Hire	Darlene Director	Employee Self E Oct 7, 20
DHRM Annual Performar TIMOTHY CHANEY	00235083000	MICHAEL PATRICK	PD (EWP) Review Oct 10, 2

Changing a Review Status

- Statuses can be changed at a bulk level but also can be done from the Performance Center or from Employee Search by clicking the name of the status.

Performance reviews

Agency - Parent: Test Agency ⓘ Search Clear

Select ▾	Review process ▲	First name	Last name	Employee No.	Review Manager	Status	Start date	Review end date	Current step enter
☐	TEST Probationary Review Pr	Timmy	Tester		Cynthia McManager	12 Month Probationary Progress Review	Feb 10, 2026	Jan 27, 2027	Apr 6, 2026
☐	2026 Annual Performance R	Timmy	Tester		Cynthia McManager	Reviewer Approval - PD & Objectives	Nov 17, 2025	Dec 18, 2026	Feb 13, 2026
☐	2026 Annual Performance R	Timmy	Tester		Cynthia McManager	PD Review & Objective Setting	Nov 18, 2025	Dec 19, 2026	Nov 18, 2025
☐	2026 Annual Performance R	Timmy	Tester		Cynthia McManager	Evaluation Meeting and Acknowledgem	Jan 1, 2026	Feb 1, 2027	Feb 19, 2026

2. Select the status you would like to move the review to then select the “Save” button.

Change status

Select a status to move this item to

Status:

- PD Review & Objective Setting
- Reviewer Approval - PD & Objectives
- Employee Acknowledgement
- Ongoing Feedback
- Employee Self Evaluation
- Supervisor Evaluation
- Reviewer Approval - Evaluation
- Evaluation Meeting and Acknowledgement
- Complete

Save **Cancel**

Archiving a Review

1. Select Performance Center from the Hamburger menu. Select Performance Reviews and search for Employee.

Performance reviews								
harry hire							Search	Clear
Select ▾	First name	Last name	Employee No.	Review Manager	Status	Start date	Review end date	Current step
Review process ▲								
2026 Annual Performance Rt	Harry	Hire		Cynthia McManager	PD Review & Objective Setting	Apr 7, 2026	Feb 1, 2027	Apr 7, 2026

2. Scroll to the right of the screen and select “Archive” to archive the review.

harry hire Search Clear									
v Manager	Status	Start date	Review end date	Current step entered date	Current review	Role	Agency - Parent	Agency	
a McManager	PD Review & Objective Setting	Apr 7, 2026	Feb 1, 2027	Apr 7, 2026	Yes		Division 1	Departme	Actions Archive