How to update your JRW in the online tool

Table of Contents

Instructions for Employees

- The Job Responsibilities Worksheet (JRW) ................................................................. 2
- Creating a New JRW ........................................................................................................ 3
- Submitting Your JRW for Approval .............................................................................. 5

Instructions for Supervisors

- Reviewing and Approving a JRW .................................................................................. 9
- Opening a JRW for Your Employee to Modify ............................................................... 11
Instructions for Employees:

You will begin each performance management cycle by meeting with your supervisor to review your job responsibilities and expectations (using the Job Responsibilities Worksheet as a guide). You will also discuss goals for the upcoming performance management cycle. Once you’ve met with your supervisor, you will use the JRW online tool to document your job responsibilities.

This guide will help you navigate the JRW documentation process, step-by-step. For more information about the JRW, please visit ohr.psu.edu/compensation-and-classification/job-responsibilities-worksheet

Logging into the online tool:

1. Launch a web browser and navigate to you.psu.edu.
2. You will be prompted to log into WebAccess. After logging in, you will be brought to the home screen of the online tool; your work area is located in the gray box on the left side of your screen.

IMPORTANT: This online tool works best in the latest desktop, tablet, and mobile browsers, specifically Chrome, Safari and Firefox (Internet Explorer 10.0 and above will work, if necessary, but not ideal).

If you experience any difficulties with updating your JRW, please contact compensation@psu.edu for assistance.
The Job Responsibilities Worksheet (JRW)

1. Begin by clicking on the “Job Responsibilities Worksheet (JRW)” link under My Work Area in the menu on the left. This will take you to a screen that displays your name, Access ID, HR Admin area, job code, title, and email address.

2. Next, enter your Supervisor’s Access ID (i.e. the first part of their Penn State email address) in the box provided in the Access/Create Job Responsibilities Worksheet area. Once you’ve entered your supervisor’s Access ID, click on the blue “Access/Create JRW” button and you will be taken to your Job Responsibilities Worksheet (JRW) dashboard.
2. If your JRW was already entered into the system and approved during a past review cycle, all components of your JRW will be complete.

To view your JRW in its entirety, click on the green “Show Summary” button. If you need to make a change after reviewing with your supervisor, click on the component’s green button in order to make the change. Remember to click on the “save” button before returning to the JRW dashboard to submit for approval.

**IMPORTANT:** If your position has recently changed and you would like the JRW information from your previous position to be used for your new JRW, please click on the “Copy as New JRW” button.
Creating a New JRW

If a JRW does not exist for your position, you will need to create one.

1. Begin by clicking on any of the blue buttons labeled “not started” under the section titles: Position Summary, Primary Duties, Position Scope, Competencies Required, Supervisory Responsibilities, and Unit Peers.

2. Read the instructions found in each section then click inside the text area that you would like to edit and begin typing.
3. When satisfied with each entry, click the “Save - Back to JRW” button at the bottom of each section. If you have not completed the entire section, the button of the section you have started will turn yellow and be labeled as “incomplete.” Once you’ve completed the section, the button will turn green and be labeled as “complete.”

**IMPORTANT:** Never use the back button within your browser! To return back to the JRW dashboard always use the “Save - Back to JRW” button.

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**Submitting Your JRW for Approval**

Your JRW will be ready to submit for approval once all of the sections are green and labeled as “complete.” Submit your JRW by clicking on the “Submit JRW For Approval” button; you may enter a note to your supervisor in the box provided to accompany your request for approval.

Once your JRW has been submitted for approval, its status will change to “Pending Approval.” In this status, you will not be able to make edits to your JRW because it is awaiting your supervisor’s approval.

Once your JRW is approved, the status will change to “Complete” and will be locked. **If you need to make changes to your JRW once it is complete, ask your supervisor to re-open it.**
Instructions for Supervisors:

As a supervisor, you are responsible for supporting your employee’s performance which includes reviewing and approving the Job Responsibilities Worksheet (JRW). When working in your own space in the online tool, you will notice that the menu will be gray and will be labeled “My Work Area.” When you are working in an employee’s workspace, the menu will be pink and display the employee’s name in the top right corner.

Logging into the online tool:

1. Launch a web browser and navigate to you.psu.edu.

2. You will be prompted to log into WebAccess. After logging in, you will be brought to the home screen of the online tool; your work area is located in the gray box on the left side of your screen.

Here you will find your own JRW and archived performance reviews (PMWs) if you are a full-time staff employee; you will also find each of your employee’s information by clicking the “View Team” link.
**IMPORTANT:** The first time you sign into the YOU@PSU online tool during a new performance management cycle, you will be asked to enter your own supervisor’s Access ID. Your team table will not appear until you do so.

The Team Table is used to display your direct reports in an organized fashion. This table displays their role as a Supervisor (if applicable), Employee Name, Title, and the status of the JRW.

![Team Table Example](image)

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Reviewing and Approving a JRW

As a supervisor you may go into the various sections of the JRW and provide suggestions for edits; however, only an employee can make edits to the JRW.

1. Begin by clicking on the **View Team** link from the menu on the left side of your home screen. This will bring up a list of your direct reports.

2. From there, select the JRW that you would like to review listed next to the employee’s name. If there is an available JRW to be reviewed, the **JRW Status** button will display “**Pending Approval**.” Click this button to review the submitted JRW.

3. After clicking the “**Pending Approval**” button, you will be taken to a screen that will display the completed sections of your employee’s JRW. To view the JRW in its entirety, click on the green “**Show Summary**” button.
4. Clicking the green “complete” button under any of the sections will allow you to review the contents of that section. Here you are able to enter any suggested text or edits to each section. If you enter any comments into the text field in these areas, be sure to click “Save – Back to JRW.”

IMPORTANT: If you place any comments into the suggested text or edits box, you will not be able to approve the JRW. Your employee will need to make a change and resubmit.

5. When you have fully reviewed the JRW, click the bubble next to either “Approved” (if all fields are complete and correct) or “Not Approved” (if you have provided your employee with suggested edits for any of the JRW components) then, click “Submit.” The system will notify your employee of your response.
Opening a JRW for Your Employee to Modify

1. Log in to the online tool: you.psu.edu
2. Click on “View Team” on the left side of your screen.
3. Find the name of the employee that you would like to re-open the JRW for and click the green “Completed” button under JRW.
4. After clicking the green “Completed” button, scroll down on the page and locate the section titled “Open JRW for editing?” Click the bubble to the left of the yellow box labeled “Open JRW”, then click Submit. This will notify the employee that their JRW is open for editing. Remind your employee to re-submit their JRW for approval.