Job Aid—Launching and Completing Probationary Reviews in Perform2Achieve

Launching and Completing Probationary Reviews

Purpose

This job aid provides information about UTHealth's probationary review process and explains how to launch and complete probationary reviews in Perform2Achieve (P2A).

Table of Contents

- UTHealth Probationary Reviews
- Probationary Review Processes
- Accessing Perform2Achieve
- Steps in the Probationary Review Process Using Perform2Achieve

UTHealth Probationary Reviews

All new classified employees and classified employees who transfer to a position in another department are subject to a six month probationary period.

It is recommended that employees are reviewed during their probationary period at 2, 4, and 6 months from their hire date or date of transfer.

Probationary Review Process







Accessing Perform2Achieve

- 1. Go to https://go.uth.edu/perform2achieve
- 2. Enter your UTHealth username and password



Web Browser: <u>Google Chrome</u> is the recommended web browser to use for accessing Perform2Achieve.

Steps in the Probationary Review Process using Perform2Achieve

Below are the steps required to complete the probationary review process using Perform2Achieve.

Step	Steps in the Probationary Review Process		
1.	Manager launches probationary review form in P2A		
2.	Manager assesses employee's performance and completes the manager review in P2A		
3.	Manager discusses performance with employee		
4.	Manager sends probationary review form to employee signature step in P2A		
5.	Employee signs and sends probationary review form to manager signature step in P2A		
6.	Manager signs probationary review form in P2A to complete the review		





UTHealth Probationary Review Form

The probationary review form is comprised of the following sections:

- 1. Information Bar
- 2. Route Map
- 3. General Guidelines and Instructions
- 4. Probationary Review Evaluation Period
- 5. UTHealth Performance Standards
- 6. Manager Summary of Overall Performance

Information Bar



Uniated Overail Score	*9 sonsisti fema		© 2 Supporting Information
toute Map	Incomplete items	والمرتقع فالقاب والمتعد ومامر ومرعواته أألأ	
Assessment Nanager Review O Ans Anderson Manager	(1) Probationary Review Croshatton Period (1) Alwagain Sammary of Overall Performance (1) Willook Performance Standards (1) Taumoro/Coldandards (1) Work Environment, Staffer & Compliance (1) Outling of Store	Hurs Completion Completion	
Seneral Guidelines & Instru All sew employees and employees and transfer Instructions	(1) Jos holienega (1) Adendurs and Punchaithy (1) Dependatility (1) IntegrhylEthice	ationary period. It is recommended that employees are reviewed during their protationary period	at 2. 4, and 6 months from their hire date of date of
Manager Selects Probationary Revi Manager evaluates the emptyve of Rate each performance standar Rate overall performance. User Manager schedules performance dia Manager and employee review proto	re calculation rando. advantance d. Ratings other than "Fully Meeta Expectations" require com the comments teld to enter assessment of the overall performa- culation tionary review form and discuss performance	nents. noce: Key stangths, and opportunities for improvement.	







Route Map

Route Map		10		0			
Assessment			Sig	nature		Completed	
Manager Review Alex Anderson: Manager	Discussion () Manager	\rightarrow	Employee Signature 1 Employee		Manager Signature 🚺 Manager	 Completion	

General Guidelines & Instructions

I new employees and employees who transfer to a position in another department are subject to a six month probationary period. It is recommended that employees are reviewed during their probat	tionary period at 2, 4, and 6 months from their hire date or date of
ansfer	
structions	
1. Manager Selects Probationary Review Evaluation Period.	
2. Manager evaluates the employee's performance.	
 Rate each performance standard. Ratings other than "Fully Meets Expectations" require comments. 	
 Rate overall performance. Use the comments field to enter assessment of the overall performance. Key strengths, and opportunities for improvement. 	
3. Manager schedules performance discussion.	
 Manager and employee review probationary review form and discuss performance. 	
5. Employee and manager sign the review form in P2A. An employee recommended for dismissal is not required to sign the form in P2A.	
	Filde Instructi

Probationary Review Evaluation Period

Probationary Review Evaluation Period
Select the evaluation period for this probationary review using the drop-down list below.
* Probationary Review Evaluation Period

UTHealth Performance Standards

UTHealth Performance Standards	
Rate the employee on each of the UTHealth performance standards below. Ratings other than "Fully Meets Expectations" require comments.	Hide Instruction
Quality of Work	
Delivers a high quality of work that is timely, accurate and thorough.	
* Rating 🛦 🛛	
S C wrand	
Alex's Comment	
Comments not provided	
Job Knowledge	
Has and demonstrates the required knowledge; skills and capabilities to accomplish tasks and meet objectives.	
10400 4 0	
S S wrated	
Alex's Comment	
Comments not provided	



Launching and Completing Probationary Reviews

Manager Summary of Overall Performance





Launching a Probationary Review Form

1. From the Links section on the P2A home page, click on Launch Probationary Review



If you do not see **Launch Probationary Review** in the **Links** section, click on **Edit** in the **Links** section and then select the check box next to Launch Probationary Review.

elcome	Links	
Perform2Achieve (P2A) is UTHealth's online	Org Chart	Directory
performance management system. This tool provides managers and employees with the	Team Overview	Performance Mgmt Website
ability to create, manage and view:	Launch Probationary Review	Questions (HEAT Ticket: Performance
Penormance Goal Plans Probationary Reviews Annual Performance Appraisals Devidenment Plans	Development Plan	Technical Support (HEAT Ticket: P2A)
Performance Reports UTHealth Organization Charts	Dashboards	Logout
and Information	Sedit	

2. Click on the name of the employee for whom you are launching the probationary review form.

Launching and Completing Probationary Reviews



- 3. Enter the probationary review form
 - Review Start date
 - Review End date
 - Review Due date

Performance	orms - Carrie Meusborn on behalf of Alex Anderson - C People Search Perform2Achi
Reviews Team	nniew Help & Tutorials
All Forms	Please provide review periods and due date in the fields below.
In Progress	Review period and due date of Probationary Review Form for Brooke Brown
Inbox En Route	Review Start: 09/12/2014 Enter the employee's 1st day/ effective date
Completed	Review Ent: 11/12/2014 Enter the date for the end of the probationary review perid - last day of the 2, 4, or 6 month period.
Form Status	Review Due: 11/122014 Same as the "Review End" date - last day of the 2, 4, or 6 month period.
and the second day is the second day of	

4. Click on the **Create and Open** button.

My Form	s	
All Forms	Please provide review periods and due date in the fields below.	1
In Progress	Review period and due date of Probationary Review Form for Brooke Brown	
Inbox En Route	Review Start 09/15/2014	
Completed	Review End: 11/15/2014	
Form Status	Review Due: 11/15/2014	•



Completing the Manager Review

Steps in Completing the Manager Review

1. Select the evaluation period for the probationary review.

2 month evaluation
4 month evaluation
6 month evaluation
Other

Probationary Review Evaluation Period			
Select the evaluation period for this probationary review using the * Probationary Review Evalue	drop-down list below ation Period		
UTHealth Performance Standards	2 month evaluation 4 month evaluation 6 month evaluation 0ther sta below. Rath	imments.	Hide Instruction

2. Rate the employee on each of the performance standards. Ratings other than "Fully Meets Expectations" require comments.

Quality of Work	Delivers a high quality of work that is timely,
	accurate and thorough.
Job Knowledge	Has and demonstrates the required knowledge,
	skills and capabilities to accomplish tasks and meet
	objectives.
Dependability	Meets deadlines and standards for quality and
	quantity of work within area of responsibility. Is
	reliable and makes effective use of resources.
Integrity/Ethics	Builds trust. Model of principled, ethical, and
	values-orientated behavior.
Teamwork/Collaboration	Demonstrates willingness to assist colleagues with
	various projects/tasks. (Assigned or unassigned).
	Listens to others and values opinions; works
	effectively and cooperatively with others.
Attendance and Punctuality	Reports to work on time. Gives prompt notice of
	absence.
Work Environment, Safety & Compliance	Completes all mandatory safety and compliance
	training by required deadlines. Adheres to safety
	rules, and compliance/HOOP standards and
	policies.



Launching and Completing Probationary Reviews

	Self Rating	
Writing Assistant		
	Writing Assistant	Self Rating Writing Assistant

Selecting a Rating

- Move your mouse over the circles below "Rating" to display the rating. Click on the appropriate circle to select the rating.
- Not Applicable if an item is not applicable, click on the circle with the line through it

Entering Comments

- Click below where it says "Employee's Name Comment" to display the comments box
- Click on the Writing Assistant tab for helpful suggestions if desired
- 3. Select the overall performance rating and enter comments.

Manager Summary of Overall Performance	~
Use this section to summarize and rate the employee's overall performance.	Ç
If dismissal is recommended, contact an Employee Relations Advisor within the Human Resources Department at (713) 500-3130 prior to your discussion with the employee.	
Alex's Comment	Ś
B Z U 注 荘 律 律 Q 瑞 See ▼ ♥ ◀	Ç
	1
have an a set a second and a second and a second and and and and and and and and and a	

4. When finished rating each item and entering all comments, click on the **Send to Discussion** button.



Note: If you need to exit and return to the form at a later date to complete, click on the **Save and Finish Later** button.



Sending the Probationary Review to the Employee Signature Step

After the discussion, the manager will need to log in to P2A and move the form from the Discussion step to the Employee Signature step. The employee will receive an email notification that the form is ready for their signature.

- From the P2A home page, in the "Links" section, click on **Team Overview**.
- Click on the "Confirm 1:1 meeting and send to Brooke"

Performance Forms -			
Reviews Team Over	view Help & Tutorials		
Probationa	ry Review Form		
FY2014 HCPC There are additiona	Annual Appraisal Form al team members to eview		
FY2014 UTHealth Performance Appraisal Form There are additional team members to review			
Probationary R	eview Form		
My Team ▲	Manager Review	Discussion	
Brooke Brown	Retain	Confirm 1:1 meeting and send to Brooke	



Completing the Probationary Review

Managers will receive an email after the employee has signed the form. To complete the form, Managers will need to log in to P2A and click on Manager Signature from the "To Do" section on the P2A home page.

