Classified Staff
Performance Appraisal Training for Employees
Course Objectives

• Learn how to access Perform2Achieve

• Understand the layout of the Classified Appraisal form

• Understand how to complete your self-review in Perform2Achieve

• Learn how to print your appraisal form for your performance discussion with your manager

• Learn how to sign your appraisal form in Perform2Achieve

• Understand how to enter your performance goals for next year
Appraisal Requirements

**Required**

- All non-probationary, benefits eligible UTHealth employees, regardless of classification and appointment time, must receive annual performance appraisals.

**Not Required**

- Probationary employees (hired March 1 – August 31 of the current year). Managers should follow the probationary review process for these employees.

- Persons in a casual, temporary or part-time non-benefits eligible appointment status are not required to receive an annual performance appraisal unless required by an external accrediting agencies.

- Persons employed in positions that require student status as a condition of employment do not receive performance reviews. These positions include graduate student assistants and tutors.

- Employees who transferred to a new position in another department between March 1 and August 31 of the current year are in a probationary period. Managers should follow the probationary review process for these employees.
Performance Management System

• UTHealth uses an online performance management tool called Perform2Achieve (P2A) which is powered by SuccessFactors

• You may access the system quickly by entering the following in your web browser:

  https://go.uth.edu/perform2achieve
Annual Performance Appraisal Activities

1. Enter/Update Current Year Performance Goals
   Update performance goals in the performance goal plan for the current performance period being evaluated in Perform2Achieve. New users will need to enter their performance goals.

2. Complete Annual Performance Appraisal
   Complete the annual performance appraisal process using Perform2Achieve.

3. Enter Performance Goals for Next Year
   Enter performance goals in the performance plan for next year in Perform2Achieve.
MANAGING PERFORMANCE GOALS

1. Update/Enter Performance Goals for Current Year
Performance Goals

Performance goals are goals aligned to an employee’s job responsibilities, work assignments and the organization’s objectives/priorities.

• If you are new to the system, you will need to enter your goals before capturing your performance results for the goal.
  • You can enter goals from your performance appraisal form once it has been launched.
  • If you want to enter goals before the appraisal form is launched, from the “Home” menu go to “Performance Goals”

• If you already have goals entered for the current fiscal year, you can go directly to your performance appraisal to update and capture your results.
Entering Performance Goals
Appraisal Form

1. Open your appraisal form from “To Do”

2. Scroll down to the performance goal section and click on “Add Goal”
Performance Goals
Editing Goal Details from Appraisal Form

1. Click on “Edit” at the end of the goal name to display the goal details box.

2. Update goal details as needed.

3. Click on “Save Changes”
Postponed and/or Cancelled Goals

If a goal on your goal plan is no longer relevant, you can update the GOAL STATUS to indicate that the goal was cancelled or postponed.

NOTE: Only managers can delete an employee’s goal.
Performance Goals
Entering Comments and Results

Click here to enter comments and results.
CLASSIFIED PERFORMANCE APPRAISAL

Complete Annual Performance Appraisal
Performance Appraisal Process

Employee Review → Manager Review → Employee Signature → Manager Signature
UTHealth Performance Standards

**All Employees**
- Exhibits Required Job Knowledge (Not Applicable for HCPC)
- Demonstrates Personal Effectiveness and Accountability
- Delivers Quality Student, Patient and Customer Services
- Exhibits Teamwork and Collaboration
- Exemplifies Strong Ethics, Integrity and Respect for Others
- Adheres to All Work Environment, Health, Safety and Compliance Standards

**People Managers Only**
- Leads and Develops Others
- Promotes and Values Diversity
- Sets Vision, Strategy and Priorities for Areas of Responsibility

Employees who are not people managers should select a rating of “Not Applicable” for these standards.
Rating Scale

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsatisfactory</td>
<td>Performance was consistently below expectations in most essential areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. A plan to correct performance, including timelines, must be outlined and monitored to measure progress.</td>
</tr>
<tr>
<td>Improvement Needed</td>
<td>Performance did not consistently meet expectations – performance failed to meet expectations in one or more essential areas of responsibility, and/or one or more of the most critical goals were not met.</td>
</tr>
<tr>
<td>Fully Meets Expectations</td>
<td>Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.</td>
</tr>
<tr>
<td>Exceeds Expectations</td>
<td>Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met.</td>
</tr>
<tr>
<td>Exceptional</td>
<td>Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of unit, department, or University objectives. This rating is achievable by any employee though given infrequently.</td>
</tr>
</tbody>
</table>
Classified Staff Appraisal

Form Layout

- Employee Review
- Manager Review
- Employee Signature
- Manager Signature

- Information Bar
- Route Map
- UTHealth Performance Standards
- Performance Goals
- Employee Summary of Overall Performance
- Manager Summary of Overall Performance
- Signatures
Information Bar

Route Map

Performance Standards

Performance Goals

Employee Summary of Overall Performance
The “Incomplete Items” button on the information bar at the top of the page allows you to quickly move to that item in the form.

This feature is very useful if you have to save and close your appraisal form and return later to complete it.
COMPLETING YOUR EMPLOYEE REVIEW

Employee Review
Manager Review
Employee Signature
Manager Signature
## Steps for Completing the Employee Review

<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access Your Appraisal Form</td>
</tr>
<tr>
<td>2</td>
<td>Rate and enter comments for UTHealth Performance Standards</td>
</tr>
<tr>
<td>3</td>
<td>Rate and enter comments for each Performance Goal</td>
</tr>
<tr>
<td>4</td>
<td>Optional: Print Form for Discussion with Manager</td>
</tr>
<tr>
<td>5</td>
<td>Save and Send to Manager Review</td>
</tr>
</tbody>
</table>

**Flowchart:**
- **Employee Review**
  - Access Your Appraisal Form
  - Rate and enter comments for UTHealth Performance Standards
  - Rate and enter comments for each Performance Goal
  - Optional: Print Form for Discussion with Manager
  - Save and Send to Manager Review
  - Manager Review
  - Employee Signature
  - Manager Signature
Accessing Your Appraisal

Method 1

Click on “Document Link” in the launch email notification from your UTHealth Outlook Inbox.

Method 2

- Log in to P2A https://go.uth.edu/perform2achieve
- From the “To Do” list, click on “Employee Review”
Rating and Entering Comments
UTHealth Performance Standards

Move your mouse over each circle to see rating. Click circle to select rating.

Click under “Employee Name Comment” to display text box to enter comments.

Text Box Tools:

Note: Comments are required for all ratings except “Fully Meets Expectations”
UTHealth Performance Standards

Writing Assistant Tool

Writing Assistant data exists for each UTHealth performance standard and is designed to help employees and managers write their feedback.

1. Click on “Writing Assistant”
2. Click on a phrase to display writing assistant data
3. **Adjust the Positivity** as needed
4. Click on “Place Quote”
5. Click on the “x” in the upper right-hand corner to close the window
6. Modify the text in the comments field below the rating as needed
Rating and Entering Comments

Performance Goals

Move your mouse over each circle to see rating. Click circle to select rating.

Click under “Employee Name Comment” to display text box to enter comments.

Note: Comments are required for all ratings except “Fully Meets Expectations”
Printing Your Appraisal Form
Optional

With the form open:
1. Click on the Print Icon
2. Click on the Print button at the top of the form
Printing Your Appraisal Form

Continued

3. Select printer
4. Set print options
5. Click “Print”
Sending Your Appraisal to Manager Review

Once you have rated and entered comments for each UTHealth Performance Standard and Performance Goal, click on “Send to Manager Review”.

![Appraisal Form Example](image)
SIGNING YOUR APPRAISAL FORM

- Employee Review
- Manager Review
- Employee Signature
- Manager Signature
Signing Your Appraisal Form

1. Log in to P2A

2. From “To Do”, click on Employee Signature

3. Optional: add comments

4. Click on the “Sign and Send to Manager Signature” button
Signing Your Appraisal Form

1. Scroll to the bottom of the form
2. OPTIONAL: enter comments
3. Click on the “Sign and Send to Manager Signature” button.

You have not completed your performance appraisal activities.
ENTERING PERFORMANCE GOALS FOR NEXT YEAR
Accessing the Performance Goal Form for Next Year

1. Log in to P2A
   https://go.uth.edu/perform2achieve

2. From the “Home” menu, click on the drop-down arrow and select “Performance Goals”

3. Click on the drop-down arrow next to “Switch Plan” and select the goal plan for the next fiscal year.