

HCPC Classified Staff Performance Appraisal Training



Course Objectives

- Understand the performance appraisal process
- Learn how to access Perform2Achieve
- Understand the HCPC 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

Appraisal Requirements

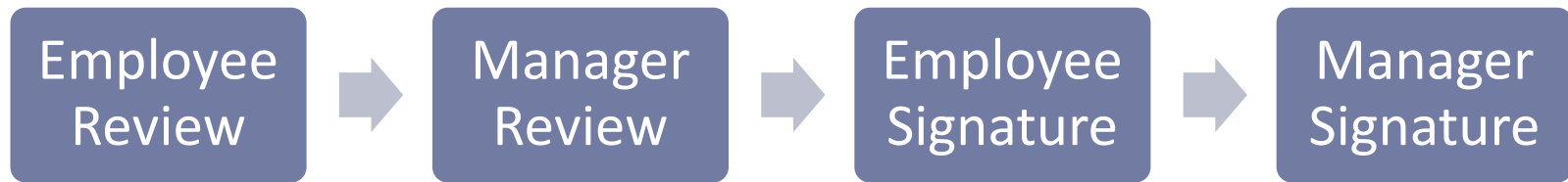
Required

- All HCPC Classified Employees not in their probationary period are required to complete an annual appraisal at this time.

Probationary Employees - Not Required

- Employees hired March 1 – August 31 are in their probationary period
- Managers should follow the probationary review process for these employees.

Performance Appraisal Process



HCPC Classified Staff Appraisals

Overview

HCPC Classified employees are evaluated on the criteria below using a weighted appraisal form that calculates the overall rating.

UTHealth
Performance
Standards

• 40%

Job Specific
Competencies

• 60%

UTHealth Performance Standards

The UTHealth performance standards account for 40% of the overall evaluation score.

All Employees

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 

     Not Applicable

Job Specific Competencies

- The job specific competencies account for 60% of the overall evaluation score.
- Job specific competencies are defined for each job code.
- All employees have been provided with a list of the job specific competencies for their job.
- If you have questions regarding your job specific competencies, talk to your manager.

Rating Scale

1.0 – 1.49	Unsatisfactory
1.5 – 2.49	Improvement Needed
2.5 – 3.49	Fully Meets Expectations
3.5 – 4.49	Exceeds Expectations
4.5 – 5.00	Exceptional

HCPC CLASSIFIED APPRAISAL FORM

HCPC Classified Staff Appraisal

Form Layout



Employee	Incomplete Items	Information Bar	Support Information
Route Map			
UTHealth Performance Standards – 40%			
Job Specific Competencies – 60%			
Manager Summary of Overall Performance – Overall Rating Calculated			
Signatures			

HCPC Appraisal Form


Performance Forms ▾

Amy Dobson on behalf of Brooke Brown ▾


Perform2Achieve

[Reviews](#) [Team Overview](#) [Help & Tutorials](#)

FY16 HCPC Annual Appraisal Form for Classified Staff for Brooke Brown



unrated
Overall Score

 0
Incomplete Items

Route Map

Hide

Assessment

Signature

Completed

Employee Review
Brooke Brown: Employee

Manager Review
Manager

Employee Signature
Employee

Manager Signature
Manager

Completion

Introduction

Please use this form to evaluate performance for this performance period. HCPC classified employees are evaluated on UTHealth Performance Standards and job specific competencies. After the manager rates the employee for each performance standard and job specific competency, the overall rating will be calculated. Below is the rating scale used to determine the employee's overall rating.

Rating Scale

- 1.0 - 1.49 = Unsatisfactory
- 1.5 - 2.49 = Improvement Needed
- 2.5 - 3.49 = Fully Meets Expectations
- 3.5 - 4.49 = Exceeds Expectations
- 4.5 - 5.00 = Exceptional

Hide Instruction

UTHealth Performance Standards (40%)

Rate each of the UTHealth Performance Standards below. Comments are required for all ratings except "Fully Meets Expectations."

Hide Instruction

Job Specific Competencies (60%)

Rate each of the job specific competencies below. Comments are required for all ratings except "Fully Meets Expectations."

Hide Instruction

Save and Finish Later

Send to Manager Review

Information Bar

Incomplete Items

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.

The screenshot displays the 'FY2014 HCPC Annual Appraisal Form for Brooke Brown'. At the top, there is a profile picture placeholder and a button labeled '* 19 Incomplete Items'. Below this is a 'Route Map' section. A modal window titled 'Incomplete Items' is open, showing a list of items. The list is organized into two sections: '(0) UTHealth Performance Standards' and '(0) Job Specific Competencies'. Each section contains a list of items, some of which are marked with a '(1)' indicating they are incomplete. The 'Rating Scale' section at the bottom indicates that 2.5 - 3.49 represents 'Fully Meets Expectations'.

FY2014 HCPC Annual Appraisal Form for Brooke Brown

* 19 Incomplete Items

Incomplete Items

- (0) **UTHealth Performance Standards**
 - (1) Promotes and Values Diversity (People Managers Only)
 - (1) Sets Vision, Strategy and Priorities for Areas of Responsibility (People Managers Only)
 - (1) Delivers Quality Student, Patient and Customer Services
 - (1) Exhibits Teamwork and Collaboration
 - (1) Adheres to All Work Environment, Health, Safety and Compliance Standards
 - (1) Leads and Develops Others (People Managers Only)
 - (1) Exemplifies Strong Ethics, Integrity and Respect for Others
 - (1) Demonstrates Personal Effectiveness and Accountability
- (0) **Job Specific Competencies**
 - (1) HCPC - 1055 - 08 - Patient Treatment Plans: Develops, implements, supervises and evaluates a plan of care for each assigned patient. Identifies and updates plan of care based on

Rating Scale

- 1.0 - 1.49 =
- 1.5 - 2.49 =
- 2.5 - 3.49 = Fully Meets Expectations

COMPLETING YOUR SELF-REVIEW

Steps for Completing Self-Review



1

Access Your Appraisal Form

2

Rate and enter comments for UTHHealth Performance Standards

3

Rate and enter comments for Job Specific Competencies

4

Optional: Print Form for Discussion with Manager

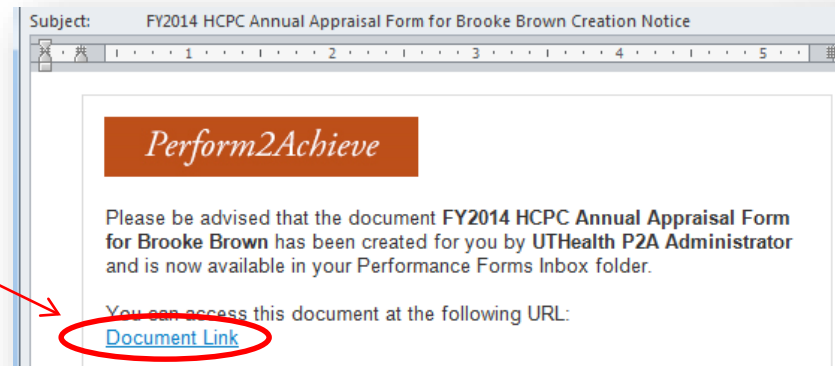
5

Save and Send to Manager Review

Accessing Your Appraisal

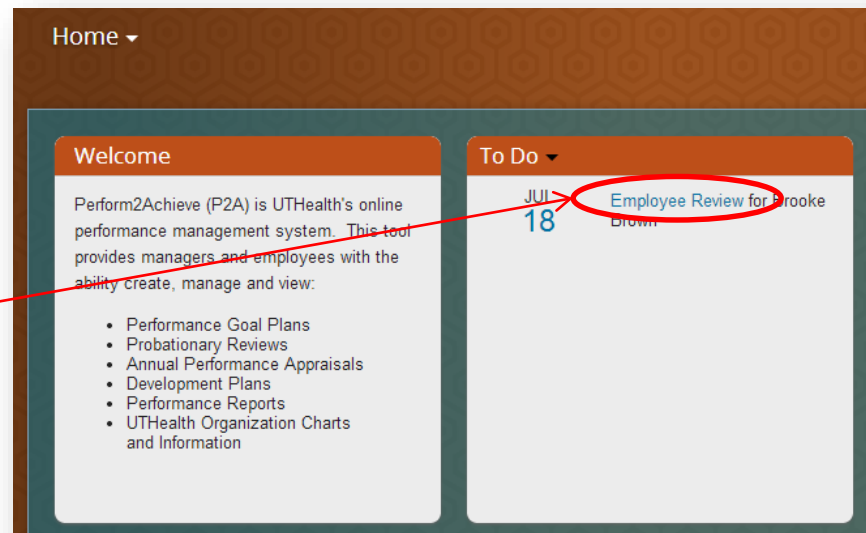
Method 1

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

UTHealth Performance Standards (40%)

Rate each of the UTHealth Performance Standards below. Comments are required for all ratings except "Fully Meets Expectations."

Hide Instruction

Demonstrates Personal Effectiveness and Accountability

12.5% of total score

Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, meets attendance/punctuality requirements. Communicates well both verbally and in writing. Shares information and ideas with others. Demonstrates active listening skills and interpersonal savvy. Seeks and is receptive to feedback. Maintains current skills and proactively develops new knowledge and capabilities.

Manager Rating ⚠️ ⓘ

🚫

🟡

🟡

🟡

🟡

⬜

Exceeds Expectations

Brooke's Comment

Writing Assistant

B I U | ☰ ☲ ☱ | 🌐 📎 | S ▼ | 🔗 🖨️

|

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.

The screenshot shows the 'UTHealth Performance Standards (40%)' interface. At the top, a header bar contains the title and a 'Hide Instruction' link. Below this, a section titled 'Demonstrates Personal Effectiveness and Accountability' (12.5% of total score) provides a description of the standard. A 'Find a quote about Brooke's competency' button is circled with a red circle and a yellow star labeled '5'. Below this, a 'Your rating on Brooke's competency' section shows a rating of 'Exceeds Expectations' with a star labeled '2'. A 'Writing Assistant' button is circled with a red circle and a yellow star labeled '1'. Below the rating, a list of 'Exceeds' phrases is shown, with 'actively seeks feedback' circled with a red circle and a yellow star labeled '2'. A 'Describe Behavior' tab is selected, and a 'Preview Quote Below' section shows a sample quote. Below the quote, a 'Select a Narrative' section shows 'Brooke' selected, and an 'Adjust the positivity' section with minus, plus, and reset buttons is circled with a red circle and a yellow star labeled '3'. A 'Place Quote' button is circled with a red circle and a yellow star labeled '4'. A red arrow points from the 'Writing Assistant' button to the 'Exceeds' list.

UTHealth Performance Standards (40%)

Rate each of the UTHealth Performance Standards below. Comments are required for all ratings except "Fully Meets Expectations." [Hide Instruction](#)

Demonstrates Personal Effectiveness and Accountability 12.5% of total score

Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, meets attendance/punctuality requirements. Communicates well both verbally and in writing. Shares information and ideas with others. Demonstrates active listening skills and interpersonal savvy. Seeks and is receptive to feedback. Maintains current skills and proactively develops new knowledge and capabilities.

Find a quote about Brooke's competency

Demonstrates Personal Effectiveness and Accountability
Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, meets attendance/punctuality requirements. Communicates well both verbally and in writing. Shares information and ideas with others. Demonstrates active listening

Your rating on Brooke's competency

Exceeds Expectations

Select topics below

Improve

- appears bored or impatient
- assumes rather than confirming understanding
- be more willing to compromise
- could adapt more independently
- could be more flexible, open-minded
- could be more open to new work

Meets

- able to prioritize
- accepts additional work
- accountable for actions
- actively listens
- adjusts to new objectives
- asks clarifying questions
- can generate new ideas

Exceeds

- actively seeks feedback
- actively seeks new work
- actively solicits performance feedback
- aggressively overcomes weaknesses
- always accountable for actions
- always follows long-term plans

Describe Behavior **Give Advice**

Preview Quote Below
Brooke actively seeks feedback about her performance from co-workers, customers and management. She frequently acts on people's suggestions and maintains an open mind about things she could do to improve.

Select a Narrative:
Brooke ☒ You

Adjust the positivity: - +

Place Quote **Cancel**

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

Job Specific Competencies

Job Specific Competencies (60%)

Rate each of the job specific competencies below. Comments are required for all ratings except "Fully Meets Expectations." [Hide Instruction](#)

HCPC - 1055 - 01 - Age Specific Care: Provides age-appropriate care, including all aspects of the nursing process. Uses appropriate communication techniques for the patient's age and developmental level. Recognizes age-specific responses to treatment. 5% of total score

* Rating  Fully Meets Expectations

Brooke's Comment Writing Assistant

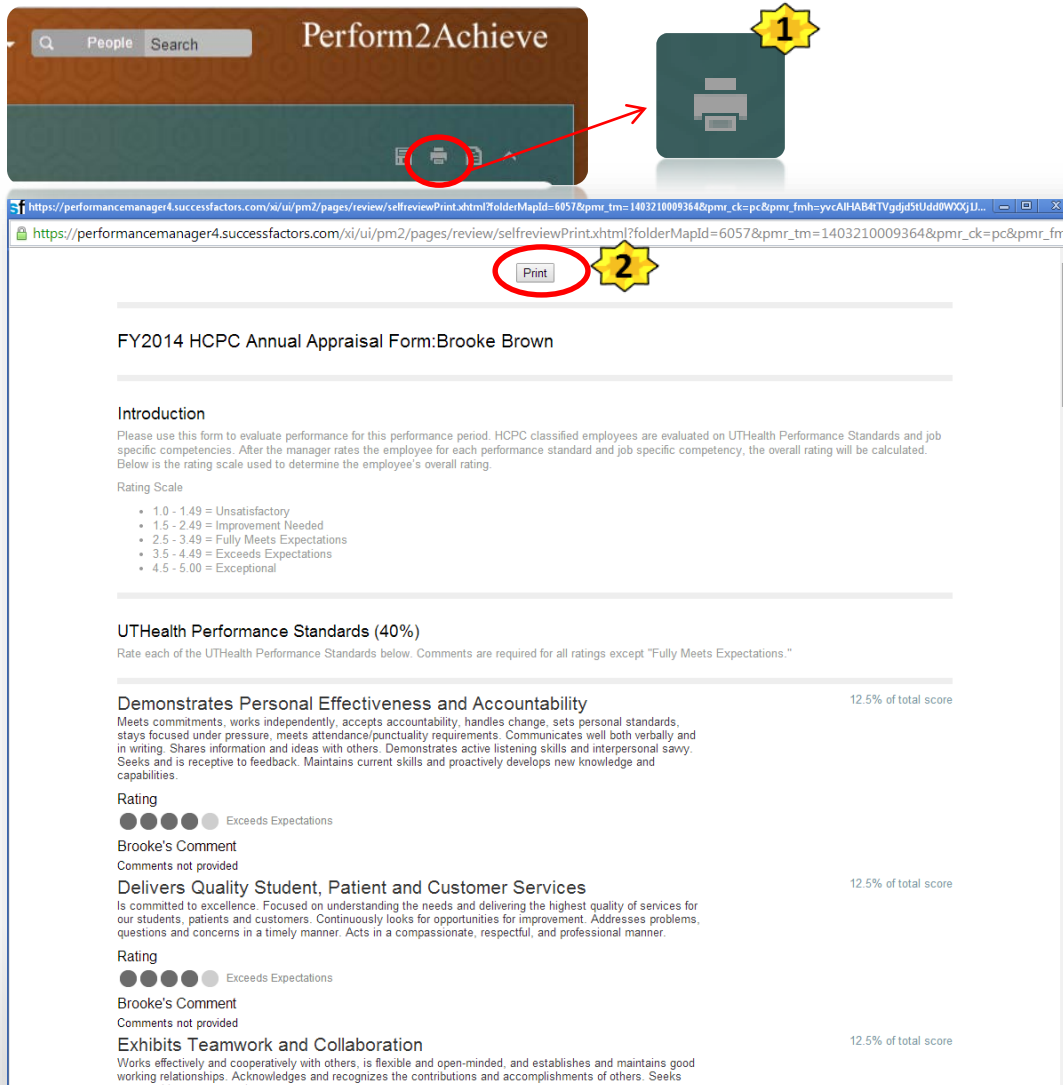
Click under "Employee Name Comment" to display text box to enter comments.

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

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"

Print
Total: 5 sheets of paper **5**
Print **Cancel**

Destination HP LaserJet Profession... **3**
Change...

4
Pages
☒ All
☐ e.g. 1-5, 8, 11-13

Copies
1 **+** **-**

Layout
☒ Portrait
☐ Landscape

Margins
Default

Options
☒ Headers and footers
☐ Two-sided
☐ Background colors and images

[Print using system dialog... \(Ctrl+Shift+P\)](#)

6/17/2014 https://performancemanager4.successfactors.com/fulprn2/pages/reviewselfreviewPrint.xhtml?folderMapId=6057&prn_tm=1403007504267&prn_cm=pc...

FY2014 HCPC Annual Appraisal Form: Brooke Brown

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UTHealth Performance Standards (40%)
Rate each of the UTHealth Performance Standards below. Comments are required for all ratings except "Fully Meets Expectations."

Demonstrates Personal Effectiveness and Accountability 12.5% of total score
Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, meets attendance/punctuality requirements, Communicates well both verbally and in writing. Shares information and ideas with others. Demonstrates active listening skills and interpersonal savvy. Seeks and is receptive to feedback. Maintains current skills and proactively develops new knowledge and capabilities.

Rating
● ● ● ● ● Exceeds Expectations

Brooke's Comment
Comments not provided

Delivers Quality Student, Patient and Customer Services 12.5% of total score
Is committed to excellence. Focused on understanding the needs and delivering the highest quality of services for our students, patients and customers. Continuously looks for opportunities for improvement. Addresses problems, questions and concerns in a timely manner. Acts in a compassionate, respectful, and professional manner.

Rating
● ● ● ● ● unrated

Brooke's Comment
Comments not provided

Exhibits Teamwork and Collaboration 12.5% of total score
Works effectively and cooperatively with others, is flexible and open-minded, and establishes and maintains good working relationships. Acknowledges and recognizes the contributions and accomplishments of others. Seeks opportunities to support the team.

Rating
● ● ● ● ● unrated

Brooke's Comment
Comments not provided

Exemplifies Strong Ethics, Integrity and Respect for Others 12.5% of total score
Deals with others in a straightforward and honest manner, is accountable for actions, maintains confidentiality, supports institutional values. Complies with the ethics and standards of their professional license. Promotes a culture of inclusion built on trust, respect and dignity for all.

Rating
● ● ● ● ● unrated

Brooke's Comment
Comments not provided

Adheres to All Work Environment, Health, Safety and Compliance 12.5% of total score

https://performancemanager4.successfactors.com/fulprn2/pages/reviewselfreviewPrint.xhtml?folderMapId=6057&prn_tm=1403007504267&prn_cm=pc&... 1/5

Sending Your Appraisal to Manager Review

Once you have rated and enter comments for each UTHealth Performance Standard and Job Specific competency, click on “Send to Manager Review”.

FY2014 HCPC Annual Appraisal Form for Brooke Brown

Changes saved

* Rating Exceeds Expectations

Brooke's Comment
Comments not provided

HCPC - 1055 - 11 - Mentoring: Provides direction for licensed and unlicensed staff. Includes staff in planning for the shift and patient care. Takes responsibility for the activities of staff. Ensures that the unit program schedule and/or activities, etc. are implemented consistently. 10% of total score

* Rating Exceeds Expectations

Brooke's Comment
Comments not provided

HCPC - 1055 - 12 - Hand Washing Hygiene: As applicable, washes hands between each patient encounter. Washes hands before medication administration. Washes hands before and after glove use. Washes hands following handling of soiled or contaminated items. Washes hands before and after eating and drinking or passing patient food trays. Washes hands after using the restroom. 5% of total score

* Rating Exceeds Expectations

Brooke's Comment
Comments not provided

Send to Manager Review

Save and Finish Later Send to Manager Review

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SIGNING YOUR APPRAISAL FORM

Signing Your Appraisal Form



1

Log in to P2A

2

From “To Do”, click on Employee Signature

3

Optional: add comments

4

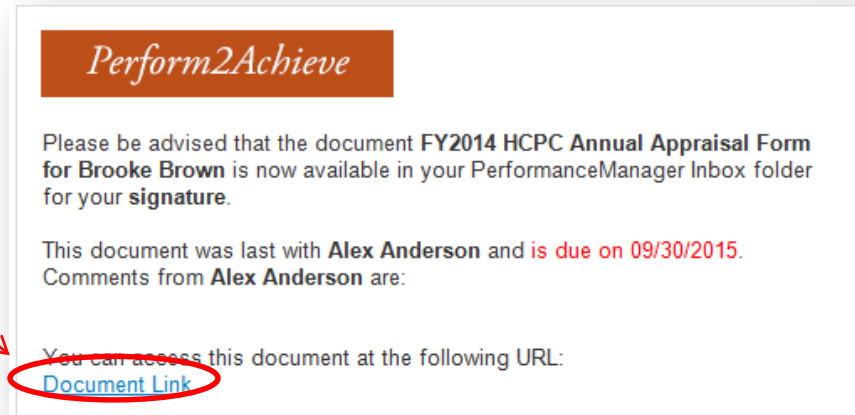
Click on the “Sign and Send to Manager Signature” button

Signing Your Appraisal Form

2 Methods for Accessing Your Form

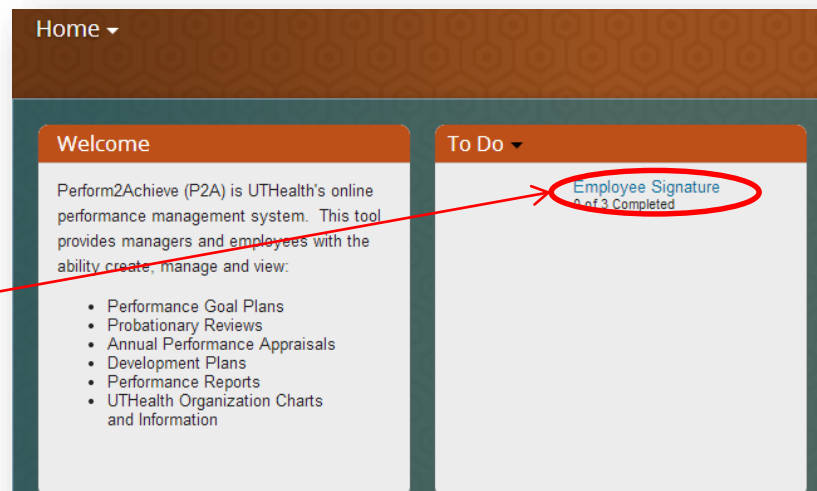
Method 1

Click on “Document Link”
in the P2A email
notification from you
UTHealth Outlook Inbox.



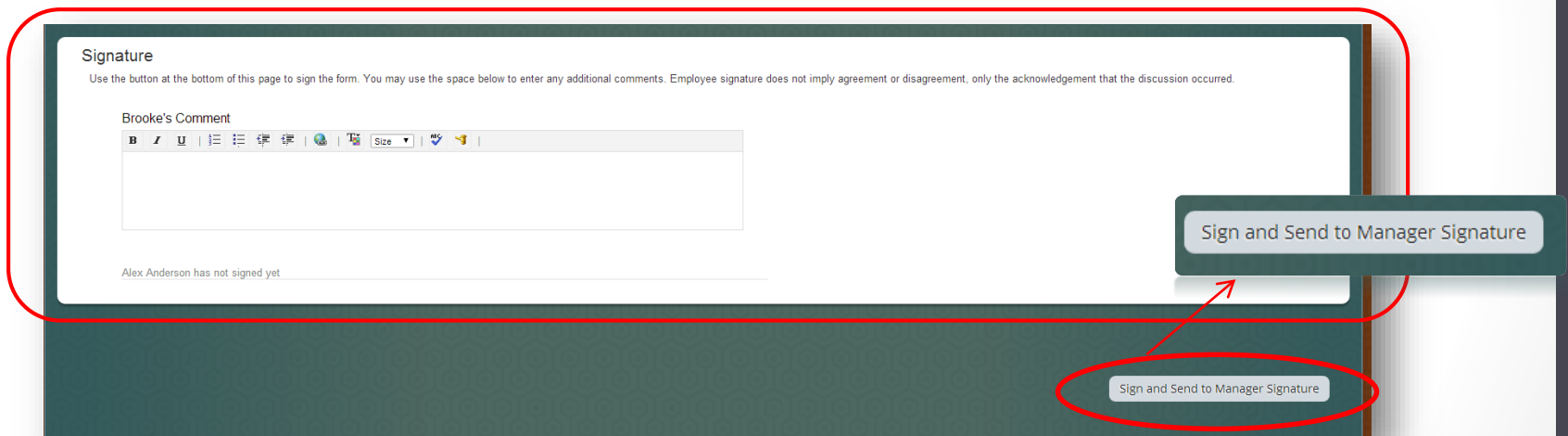
Method 2

- Log in to P2A
<https://go.uth.edu/perform2achieve>
- From the “To Do” list, click on
“Employee Signature”



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.



The screenshot shows a web interface for signing an appraisal form. A red rounded rectangle highlights the main content area, which includes the 'Signature' section. Inside this section, there is a text area for 'Brooke's Comment' with a rich text editor toolbar. Below the text area, a status message reads 'Alex Anderson has not signed yet'. To the right of the main content area, there is a dark green sidebar. In this sidebar, the button 'Sign and Send to Manager Signature' is highlighted with a red circle. A red arrow points from this button to a larger, semi-transparent version of the same button that is overlaid on the right side of the main content area.

Signature

Use the button at the bottom of this page to sign the form. You may use the space below to enter any additional comments. Employee signature does not imply agreement or disagreement, only the acknowledgement that the discussion occurred.

Brooke's Comment

B *I* U | | Size ▾

Alex Anderson has not signed yet

Sign and Send to Manager Signature

Sign and Send to Manager Signature

Congratulations!

You have now completed your
performance appraisal activities.