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

Employee Review → Manager Review → Employee Signature → Manager Signature
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.
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

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 – 1.49</td>
<td>Unsatisfactory</td>
</tr>
<tr>
<td>1.5 – 2.49</td>
<td>Improvement Needed</td>
</tr>
<tr>
<td>2.5 – 3.49</td>
<td>Fully Meets Expectations</td>
</tr>
<tr>
<td>3.5 – 4.49</td>
<td>Exceeds Expectations</td>
</tr>
<tr>
<td>4.5 – 5.00</td>
<td>Exceptional</td>
</tr>
</tbody>
</table>
HCPC Classified Staff Appraisal

Form Layout

Employee Review  Manager Review  Employee Signature  Manager Signature

Information Bar

Route Map

UTHealth Performance Standards – 40%

Job Specific Competencies – 60%

Manager Summary of Overall Performance – Overall Rating Calculated

Signatures
HCPC Appraisal Form

FY16 HCPC Annual Appraisal Form for Classified Staff for Brooke Brown

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

UTHealth Performance Standards (40%)

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

Job Specific Competencies (60%)

Rate each of the job specific competencies below. Comments are required for all ratings except "Fully Meets Expectations."
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.
COMPLETING YOUR SELF-REVIEW
Steps for Completing Self-Review

1. Access Your Appraisal Form
2. Rate and enter comments for UTHealth 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 You 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](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

Job Specific Competencies

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 enter comments for each UTHealth Performance Standard and Job Specific competency, click on “Send to Manager Review”.
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 your UTHealth Outlook Inbox.

**Method 2**

- Log in to P2A [https://go.uth.edu/perform2achieve](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.
Congratulations!

You have now completed your performance appraisal activities.