

Performance Appraisal Training for Managers



Course Objectives

- Understand the performance appraisal process and timeline
- Understand how to access Perform2Achieve
- Understand the steps and workflow of the performance appraisal process in Perform2Achieve
- Understand the layout of the appraisal form
- Understand how to use the Team Overview to manage appraisals for your direct reports
- Understand how to use the Team Rater to rate UTHealth Performance Standards for your direct reports

Course Objectives

Continued

- Understand how to complete the manager review
- Learn appraisal form print options
- Understand how to move the form from the Manager Review step to the Employee Signature step
- Understand how to complete the Manager Signature step
- Understand how to enter performance goals for your direct reports for next year

Appraisal Requirements

Required

- All non-probationary, benefits eligible UHealth 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

- UTHHealth uses an online performance management tool called Perform2Achieve (P2A)
- 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.

[HOME](#) ➔ [PERFORMANCE GOALS](#)

2

Complete Annual Performance Appraisal

Complete the annual performance appraisal process using Perform2Achieve.

[TO DO](#) ➔ [EMPLOYEE REVIEW](#)

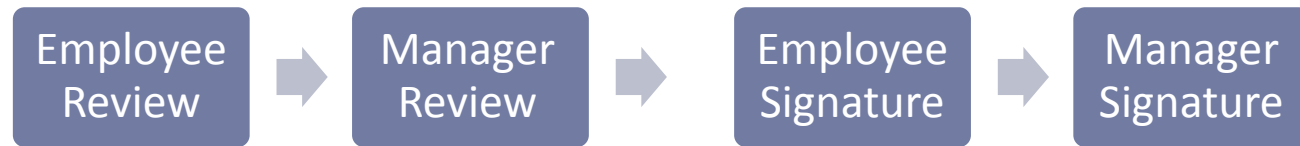
3

Enter Performance Goals for Next Year

Enter performance goals in the performance plan for next year in Perform2Achieve.

[HOME](#) ➔ [PERFORMANCE GOALS](#)

Performance Appraisal Process



Evaluation Criteria

UTHealth employees are evaluated on:

- UTHealth Performance Standards
- Performance Goals as assigned by Manager

UTHealth Performance Standards

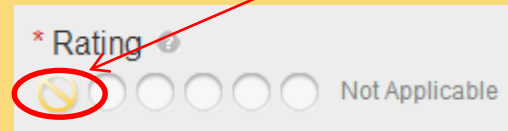
All Employees

- 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

Not Applicable

Performance Goals

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

- If an employee is new to the system, performance goals will need to be entered before they can be rated.
 - Goals can be entered directly from the performance appraisal form once it has been launched by either the employee or the manager.
 - To enter goals before the appraisal form is launched, from the “**Home**” menu go to “**Performance Goals**” and select the current fiscal year.
- If goals have already been entered, you can go directly to the performance appraisal to rate and enter feedback.

UTHealth Rating Scale

Unsatisfactory	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.
Improvement Needed	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.
Fully Meets Expectations	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.
Exceeds Expectations	Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met.
Exceptional	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.

ACCESSING PERFORM2ACHIEVE

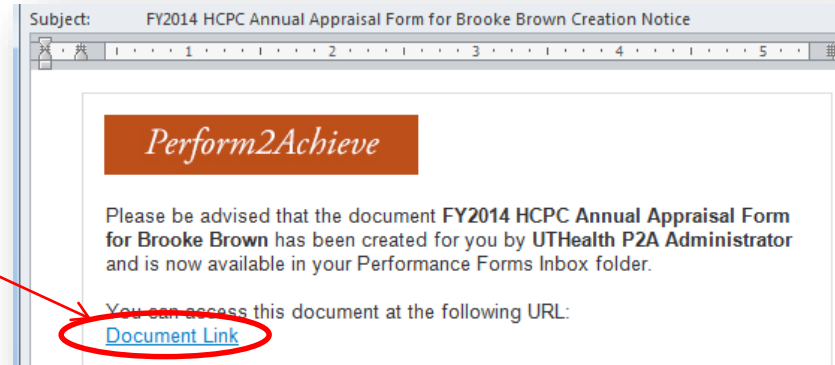
Accessing Perform2Achieve

Method 1

1. Login to P2A:
<https://go.uth.edu/perform2achieve>
 2. Enter your UTHHealth username and password
-

Method 2

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



EMPLOYEE REVIEW: MANAGER ACTIVITIES

Employee Review:

Manager Activities & Tools

Managers can begin rating their employees using the Team Overview once appraisal forms have been launched.

Any ratings entered by the manager while the form is in the Employee Review step will not be visible to the employee.

Employee Review:

Manager Activities & Tools

During the Employee Review step Managers can use the following tools to begin the evaluation process for their employees.

Team Overview	The Team Overview is a dashboard that allows managers to quickly check the status and manage all performance appraisal evaluation tasks for each of their employees from one central location.
Team Rater	The Team Rater allows managers to rate all their employees for each UHealth performance standard at one time from one central location.

TEAM OVERVIEW

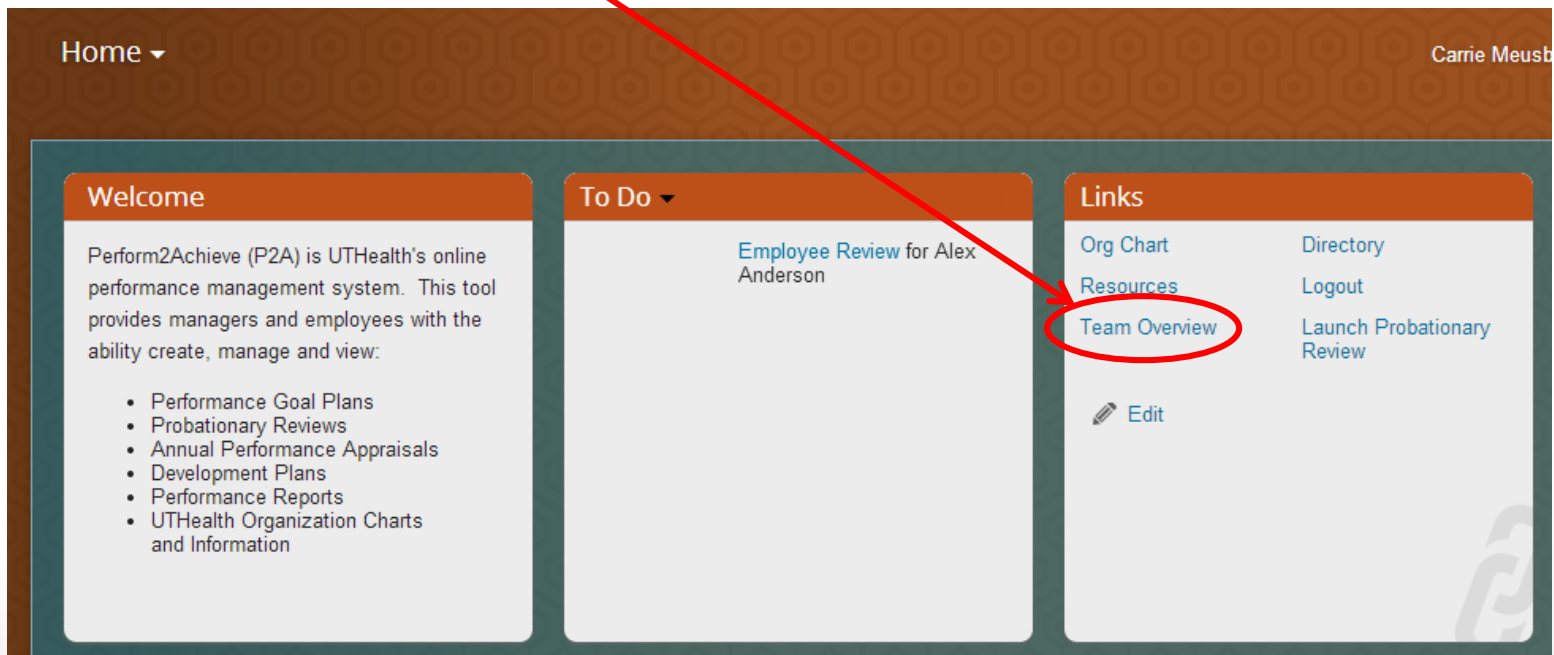
Team Overview

The Team Overview is a dashboard that allows managers to:

- View active appraisal forms in progress for all their direct reports (annual appraisals forms, probationary reviews, etc.)
- View what step each performance appraisal is in
- Open appraisal forms for direct reports to enter performance feedback
- Confirm the performance discussion and move the form to the Employee Signature step

Accessing the Team Overview

1. Login to P2A: <https://go.uth.edu/perform2achieve>
2. Enter your UTHHealth username and password
3. Click on “Team Overview” from the Links tile



TEAM RATER TOOL

The Team Rater Tool

The Team Rater allows managers to rate all their employees for each UTHHealth performance standard at one time from one central location.

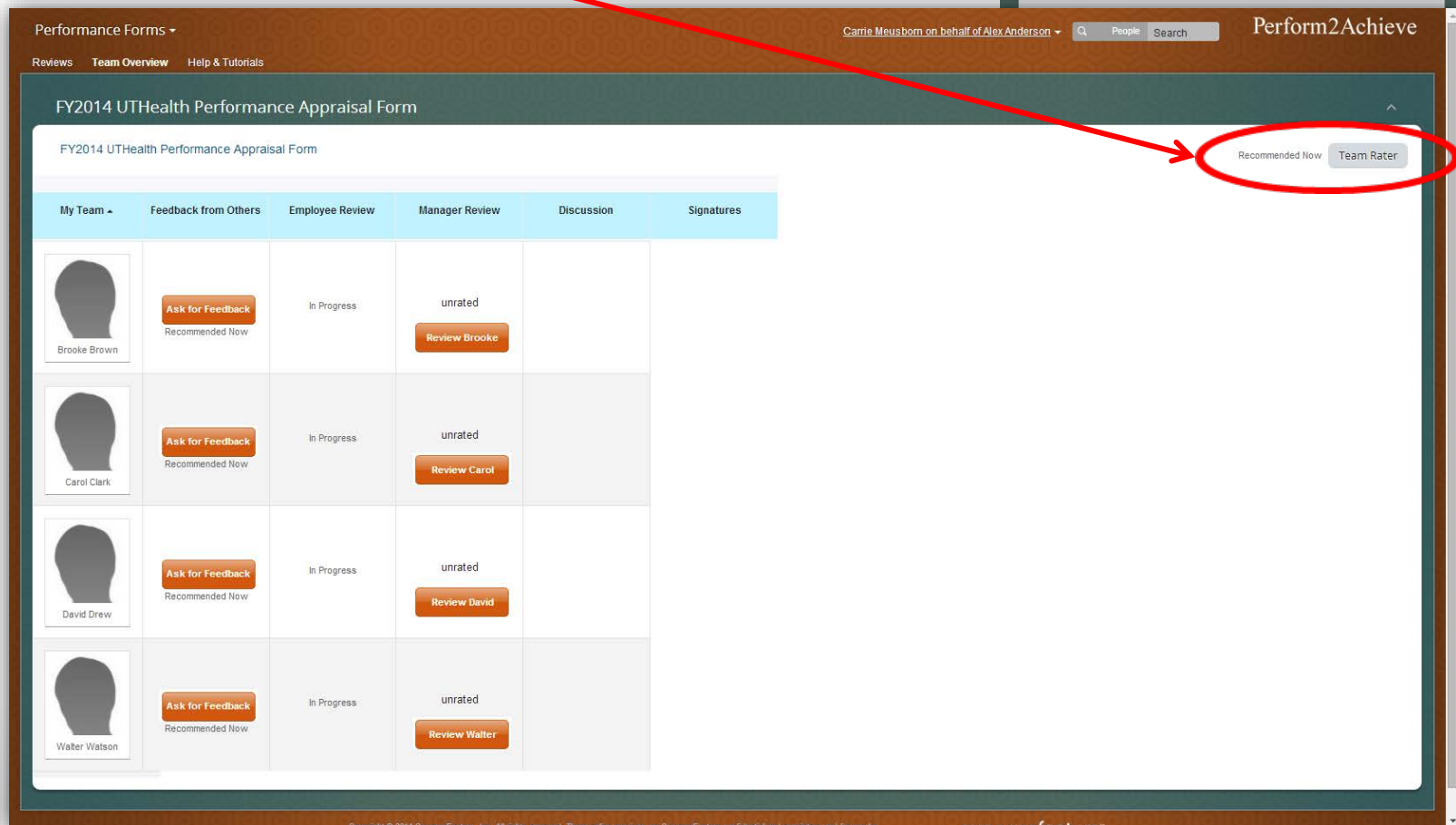
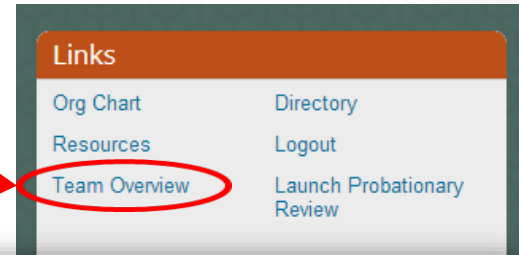
Managers can:

1. Select the rating for each performance standard
2. Enter comments for each performance standard

Any ratings and comments entered and saved using the Team Rater tool will appear in the employee's appraisal form when opened.

Accessing the Team Rater

1. Log in to P2A
2. Go to Team Overview
3. Click on “Team Rater”



Team Rater





Performance Forms ▾

Carrie Meusbom on behalf of Alex Anderson ▾ People Search

Reviews **Team Overview** Help & Tutorials

FY2014 UTHealth Performance Appraisal Form

UTHealth Performance Standards

	 Brooke Brown	 Carol	 David Drew	 Walter Watson
Adheres to All Work Environment, Health, Safety and Compliance Standards	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Delivers Quality Student, Patient and Customer Services	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Demonstrates Personal Effectiveness and Accountability	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Exemplifies Strong Ethics, Integrity and Respect for Others	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Exhibits Required Job Knowledge	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Exhibits Teamwork and Collaboration	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Leads and Develops Others (People Managers Only)	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Promotes and Values Diversity (People Managers Only)	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>
Sets Vision, Strategy and Priorities for Areas of Responsibility (People Managers Only)	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>	<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/>

1 Move your mouse over each number to see rating. Click to select rating.

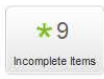
2 Click to enter comments.

3 Before closing the Team Rater, click "Save".

4 After you have clicked on "Save" click on "I'm Done" to exit the Team Rater and return to the Team Overview screen.

UTHEALTH PERFORMANCE APPRAISAL FORM

*Standard Annual Appraisal Form 2.0 for Alex Anderson



Information Bar

Route Map

Hide

Assessment

Signature

Completed

Employee Review

Alex Anderson
Employee
Due: 08/29/2014Employee Signature
Employee

Completion

Route Map

UTHealth Performance Standards

Rate each of the UTHealth Performance Standards below. Ratings other than "Fully Meets Expectations" require comments.

[Hide Instruction](#)

Exhibits Required Job Knowledge

Performs job in a manner that demonstrates necessary job knowledge, skills, and capabilities required for the position.

* Rating



Alex's Comment

Comments not provided

Performance Standards

Performance Goals

[Add Goal](#)

Use this section to rate each performance goal. Performance goals should be aligned to job responsibilities and organizational objectives. Ratings other than "Fully Meets Expectations" require comments. NOTE: Only managers can delete goals. Employees may indicate if a goal is postponed or cancelled by updating the status.

[Hide Instruction](#)

Performance Goals

Employee Summary of Overall Performance

This section may be used to summarize performance and include additional accomplishments.

Employee Summary of Overall Performance

Employee Summary of Overall Performance Section Overall Comment

Alex's Comment

[Save and Finish Later](#)[Send to Manager Review](#)

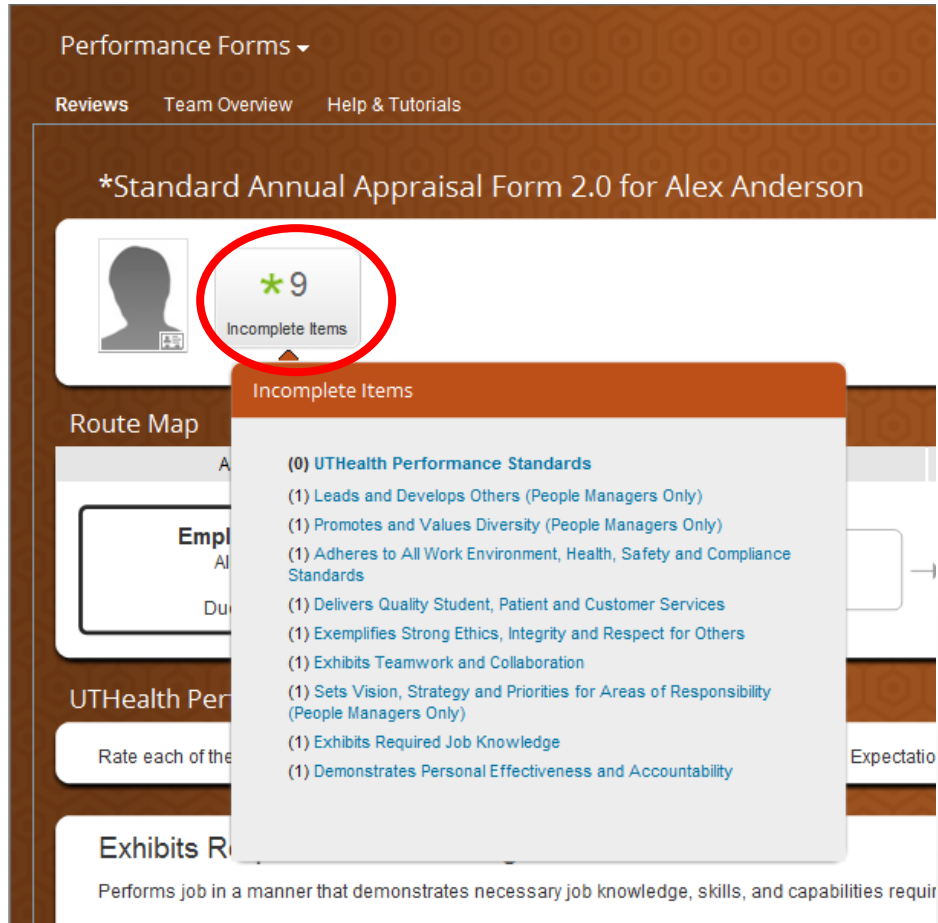
* To finalize, please complete 9 missed fields

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 'Performance Forms' interface for Alex Anderson. At the top, there are navigation links for 'Reviews', 'Team Overview', and 'Help & Tutorials'. Below this, the title '*Standard Annual Appraisal Form 2.0 for Alex Anderson' is shown. A red circle highlights the 'Incomplete Items' button, which features a green star icon and the number '9'. A dropdown menu is open, listing the following items:

- (0) UHealth Performance Standards
- (1) Leads and Develops Others (People Managers Only)
- (1) Promotes and Values Diversity (People Managers Only)
- (1) Adheres to All Work Environment, Health, Safety and Compliance Standards
- (1) Delivers Quality Student, Patient and Customer Services
- (1) Exemplifies Strong Ethics, Integrity and Respect for Others
- (1) Exhibits Teamwork and Collaboration
- (1) Sets Vision, Strategy and Priorities for Areas of Responsibility (People Managers Only)
- (1) Exhibits Required Job Knowledge
- (1) Demonstrates Personal Effectiveness and Accountability

The background shows a 'Route Map' section with a profile icon and a 'UTHealth Performance' section with a 'Rate each of the' button. The bottom of the form shows a section titled 'Exhibits R' with a description: 'Performs job in a manner that demonstrates necessary job knowledge, skills, and capabilities requir'.

THE MANAGER REVIEW



Steps for Completing the Manager Review



1

Access the Appraisal Form

2

Rate and enter comments for UTHHealth Performance Standards

3

Rate and enter comments for each Performance Goal

4

Print – print now to display both employee and manager entries

5

Schedule performance discussion with your employee


Rating and Entering Comments

Performance Goals

Service Excellence

Increase % of projects completed on time to from 70% to 90 % Completed

CPP Project Database, monthly measure.

Rating  Exceeds Expectations

Alex's Comment
Comments not provided

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

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

Goal Name	Increase % of projects completed on time to from 70% to 90 %.
Measurement	CPP Project Database, monthly measure.
Weight-HCPC Only	-999999.0
Percent Complete	100.0
Start	09/01/2013
Due	08/31/2014
Status	Completed

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

Adding Performance Goals

Sets Vision, Strategy and Priorities for Areas of Responsibility (People Managers Only)

Develops realistic plans, sets goals aligned with priorities, manages resources efficiently, and creates contingency plans. Select "Not Applicable" if the person being evaluated is not a people manager.

* Rating 

      unrated

Alex's Comment

Comments not provided

Scroll down to the performance goal section and click on "Add Goal"

1

Performance Goals

 Add Goal

Use this section to rate each performance goal. Performance goals should be aligned to job responsibilities and organizational objectives. Ratings other than "Fully Meets Expectations" require comments. NOTE: Only managers can delete goals. Employees may indicate if a goal is postponed or cancelled by updating the status.

[Hide Instruction](#)

Postponed and/or Cancelled Goals

If a goal on the 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.

Goal Details

Add Goal - Google Chrome

https://performancemanager4.successfactors.com/tgmEdit?t=3&u=bbbb&editCom

Add Goal

Edit your goal below.

Fields marked with * are required.

Category : Service Excellence

* Goal Name:

* Measurement:

Weight-HCPC Only: 0.0%

Percent Complete: 0.0%

* Start: 09/01/2013

* Due: 08/31/2014

Status: Not Started

Milestone: Add Tasks

Comments, Results, Accomplishments or Feedback:

Back Save Changes Cancel

Goal Status Options

Not Started

Behind/At Risk

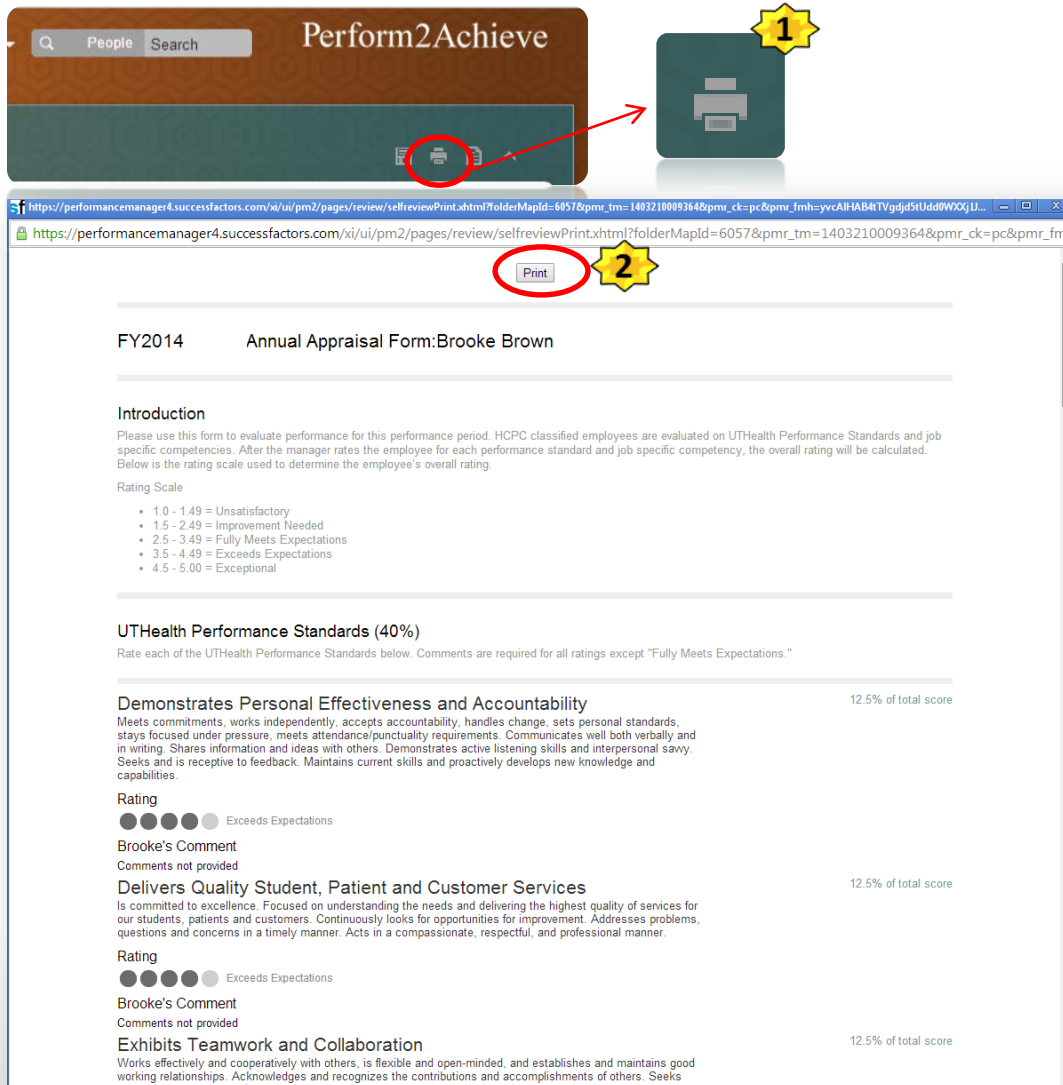
On Track

Completed

Postponed

Cancelled

Printing the Appraisal Form for Performance Discussion



With the form open:

1. Click on the Print Icon
2. Click on the Print button at the top of the form

Printing the 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/ful/pn2/pages/reviewselfreviewPrint.xhtml?folderMapId=6057&pmr_tm=1403007504267&pmr_cm=pc...

FY2014 Annual Appraisal Form: 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
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/ful/pn2/pages/reviewselfreviewPrint.xhtml?folderMapId=6057&pmr_tm=1403007504267&pmr_cm=pc&... 1/5

MANAGER SIGNATURE



Manager Signature Steps



1

Log in to P2A

2

From “To Do”, click on Manager Signature

3

Optional: add comments

4

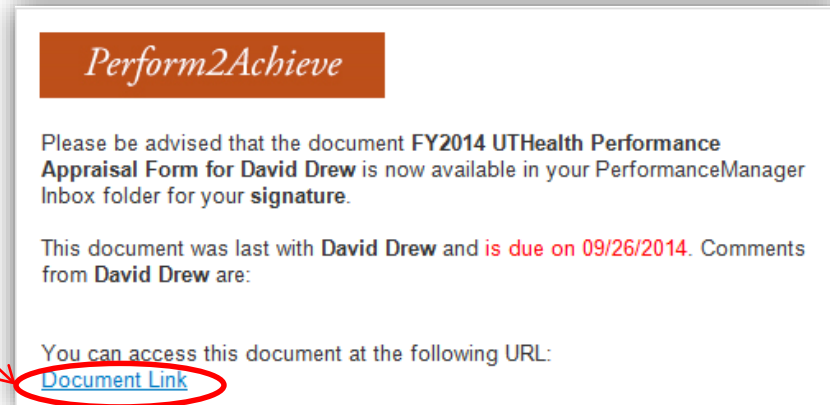
Click on the “Sign and Complete” button

Signing the 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>
- From the “To Do” list, click on
“Manager Signature”



Signing the Appraisal Form

1. Scroll to the bottom of the form and review any employee comments entered in the Employee Signature step
2. OPTIONAL: enter comments
3. Click on the “Sign and Complete Annual Review” button
4. The performance appraisal is now complete

FY2014 UTHHealth Performance Appraisal Form for David Drew

Exceeds Expectations Manager Rating
★ 0
Incomplete Items

Route Map

Assessment			Signature		Hide
					Compl
✓ Employee Review Employee	→	✓ Manager Review Manager	→	✓ Discussion Manager	→
			→	✓ Employee Signature Employee	→
				Manager Signature Alex Anderson Manager	→
					Compl

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.

David Drew 07/15/2014

Alex's Comment

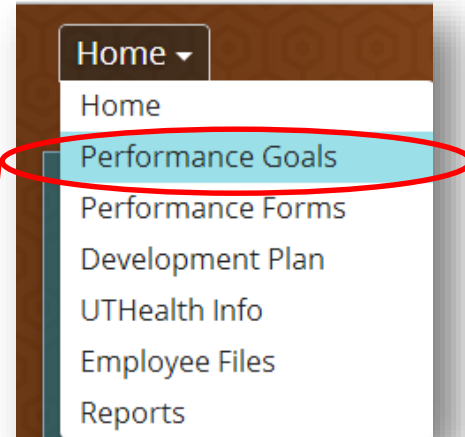
B *I* U | | Size |

Sign and Complete Annual Review

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 next fiscal year performance goal plan.


Moving to an Employee's Performance Goal Form

Click on the magnifying glass next to the employee's name to move to their performance goal form



Performance Goals ▾



FY 2016 Performance Goals for Alex Anderson



Performance goals are goals aligned to an employee's job responsibilities, work assignments and the organization goal category for each goal is accurate. Use the "Add New Goal" button at the bottom of each section to add any postpone a goal update the "Status" field using the "Edit" button. Rate and add comments as appropriate for each

 Cascade Selected...

☐ Employee Hierarchy

 Alex Anderson 

 Brooke Brown 

 Carol Clark 

☐ Display Options

Displaying 0–0 of 0 Performance Goals

Service Excellence

Financial and Operations

People Development

Research, Clinical and Academic

Copying a Goal from the Previous Year

Performance Goals ▾

Amy

FY 2016 Performance Goals for Brooke Brown

Performance goal categories and priorities. Ensure that all employee's performance goals are currently not listed. Use the "Edit" button to update a goal, change the status of a goal, update the % complete, or make additional changes to the goal. To cancel or postpone a goal, use the "Cancel" button. Comments are REQUIRED for any goal rated "Exceptional", "Improvement Needed" or "Unsatisfactory".

Click on "Copy From Other Goal Plan" button

Click on the drop-down arrow next to the Switch Plan box and select the goal plan which you want to copy to

Switch Plan: FY 2016 Performance Goals ▾

Copy From Other Goal Plan

Select the plan that contains the goal you want to copy

Click in the check box next to the goal you want to copy

Click on the "Next" button

Click the "Copy" button

Copy Performance Goals - Google Chrome

<https://performancemanager4.successfactors.com/tgmCopy?t=4&pt=08>

Step 1. Select Goal Plan

1 Step 1 of 2. Select the goal plan with the goal(s) you want to copy.

	Goal Plan Name
<input checked="" type="radio"/>	FY 2015 Performance Goals
<input type="radio"/>	FY 2014 Performance Goals
<input type="radio"/>	FY 2013 Performance Goals
<input type="radio"/>	FY 2012 Performance Goals

Back Next Cancel

Performance Goals - Google Chrome

<https://performancemanager4.successfactors.com/tgmCopy?t=3&pt=08&su=bbbb>

Select Goal

2 Step 2 of 2. Select Goal

Service Excellence	Visibility	Goal Name	Status	Percent Complete	Start	Due
<input checked="" type="checkbox"/>	Public	1.1 Increase patient satisfaction by 3% from previous year.	On Track	0.0%	09/01/2013	08/31/2014

Financial and Operations

People Development

Research, Clinical and Academic

Back Copy Cancel

Congratulations!

You have now completed this
course.