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 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)

• 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.
Performance Appraisal Process

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

<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>
ACCESSING PERFORM2ACHIEVE
Accessing Perform2Achieve

Method 1

1. Login to P2A: https://go.uth.edu/perform2achieve
2. Enter your UTHealth 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.

<table>
<thead>
<tr>
<th>Team Overview</th>
<th>The <strong>Team Overview</strong> 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.</th>
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<tr>
<td>Team Rater</td>
<td>The <strong>Team Rater</strong> allows managers to rate all their employees for each UTHealth performance standard at one time from one central location.</td>
</tr>
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</table>
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 UTHealth username and password
3. Click on “Team Overview” from the Links tile
TEAM RATER TOOL
The Team Rater allows managers to rate all their employees for each UTHealth 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

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
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 MANAGER REVIEW

Employee Review

Manager Review

Employee Signature

Manager Signature
Steps for Completing the Manager Review

1. Access the Appraisal Form

2. Rate and enter comments for UTHealth 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

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.

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

Scroll down to the performance goal section and click on “Add Goal”
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.
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”
MANAGER SIGNATURE

Employee Review → Manager Review → Employee Signature → 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
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.
Copying a Goal from the Previous Year

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

2. Click on the “Copy From Other Goal Plan” button.

3. Select the plan that contains the goal you want to copy.

4. Click on the “Next” button.

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

6. Click the “Copy” button.
Congratulations!

You have now completed this course.