

Getting Started	
<input type="checkbox"/>	Access Perform2Achieve
Employee Review	
<i>Manager Actions</i> (Available once forms are launched) Manager can complete manager review step while the performance appraisal resides in the Employee Review step; follow the steps below.	
<input type="checkbox"/>	Go to Team Overview to access performance appraisal activities for direct reports
<input type="checkbox"/>	Use Team Rater to rate UTHealth Performance Standards for all direct reports at one time (Note: Ratings and comments will be saved and visible to the manager only when viewing the appraisal form.)
<input type="checkbox"/>	Click on the Save and Finish Later button (Note: You will not be able to send the appraisal form to the next step until the employee has completed the Employee Review.)
<input type="checkbox"/>	Open the next appraisal form from Team Overview and repeat the steps above, if applicable.
Employee Actions	
Employee completes employee review and prints appraisal form (<i>optional</i>).	
Save and Send to Manager Review	
(Note: Managers will receive an email notification in their UTHealth Outlook inbox when an employee has sent his or her appraisal form to the Manager Review step.)	
Employee Overall Summary of Performance	
<input type="checkbox"/>	Enter overall summary (<i>optional</i>)
<input type="checkbox"/>	Print appraisal form (<i>optional</i>)
<input type="checkbox"/>	Click on Save and Send to Manager Review
Manager Review	
<input type="checkbox"/>	Open the employee's appraisal form and review employee ratings and comments
<input type="checkbox"/>	Ensure you have rated and entered comments for all UTHealth Performance Standards, performance goals, and selected the overall performance rating. Make any adjustments as needed. Tip: Use the Incomplete Items button at the top of the appraisal form to quickly identify and move to incomplete items.
<input type="checkbox"/>	Print the appraisal form with employee and manager feedback. Tip: If you want to print both the employee and manager ratings and comments, you must print while the form is in the Manager Review step.
<input type="checkbox"/>	Manager schedules discussion with employee
<input type="checkbox"/>	Manager prints appraisal form with manager ratings and comments
<input type="checkbox"/>	Employee and manager meet to discuss performance and establish performance goals for next year
<input type="checkbox"/>	Manager sends appraisal to Employee Signature .
Employee Signature	
<input type="checkbox"/>	Employee signs appraisal form and sends to Manager Signature (Note: The manager will receive an email notification in their UTHealth Outlook inbox that the form is ready for their signature.)
Manager Signature	
<input type="checkbox"/>	Manager accesses and signs appraisal. The appraisal form is now complete.
Plan and Enter Performance Goals for Next Fiscal Year - Use the Performance Goals job aid as a guide. Make sure to select the next fiscal year goal plan.	