

Classified Staff Performance Appraisal Training for Employees



Course Objectives

- Learn how to access Perform2Achieve
- Understand the layout of the 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
- Understand how to enter your performance goals 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) which is powered by SuccessFactors
- 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](#)

MANAGING PERFORMANCE GOALS

1

Update/Enter Performance Goals for Current Year

Performance Goals

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

- If you are new to the system, you will need to enter your goals before capturing your performance results for the goal.
 - You can enter goals from your performance appraisal form once it has been launched.
 - If you want to enter goals before the appraisal form is launched, from the “**Home**” menu go to “**Performance Goals**”
- If you already have goals entered for the current fiscal year, you can go directly to your performance appraisal to update and capture your results.

Entering Performance Goals Appraisal Form



Open your appraisal form from
"To Do"

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



Alex's Comment

Comments not provided

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

Performance Goals

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.

+ Add Goal

[Hide Instruction](#)

Performance Goals

Editing Goal Details from Appraisal Form

Click on "Edit" at the end of the goal name to display the goal details box.

1

The screenshot shows a web interface for editing a performance goal. On the left, under 'Service Excellence', there is a goal: 'Increase % of projects completed on time to from 70% to 90 %.' with an 'Edit' link circled in red. Below this is a 'Rating' section with five empty circles and 'unrated', and an 'Alex's Comment' section with 'Comments not provided'. On the right, a 'Goal Details' box is open, showing the goal's name, measurement, weight, and completion status. A large blue arrow points from the 'Edit' link to the 'Goal Details' box.

Service Excellence

Increase % of projects completed on time to from 70% to 90 %. [Edit](#)

CPP Project Database, monthly measure.

Rating unrated

Alex's Comment
Comments not provided

Goal Details

Completed

Goal Details

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

Update goal details as needed.

2

The screenshot shows the 'Add Goal' form in a browser window. The form has several sections: 'Category' (Service Excellence), 'Goal Name' (with a text area and a 'spell check' button), 'Measurement' (with a text area and a 'spell check' button), 'Weight-HCPC Only' (0.0%), 'Percent Complete' (0.0%), 'Start' (09/01/2013), 'Due' (08/31/2014), 'Status' (Not Started), 'Milestone' (Add Tasks), and 'Comments, Results, Accomplishments or Feedback' (with a text area and a 'spell check' button). At the bottom, there are 'Back', 'Save Changes', and 'Cancel' buttons.

sf 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:

Comments, Results, Accomplishments or Feedback:

Click on "Save Changes"

3

Postponed and/or Cancelled Goals

If a goal on your 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

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


Performance Goals

Entering Comments and Results

Service Excellence

Increase % of projects completed on time to from 70% to 90 %. [Edit](#)

CPP Project Database, monthly measure.

Rating  unrated

Alex's Comment
Comments not provided

Click here to enter comments and results.

Completed

Goal Details

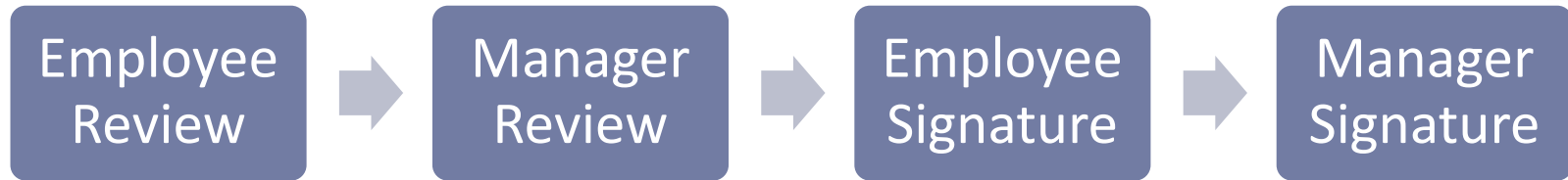
Goal Name	Increase % of projects completed on time to from 70% to 90 %.
Measurement	CPP Project Database, monthly measure.
Weight-HCPC Only	-999999.0
Percent Complete	100.0
Start	09/01/2013
Due	08/31/2014
Status	Completed

CLASSIFIED PERFORMANCE APPRAISAL

2

Complete Annual Performance Appraisal

Performance Appraisal Process



UTHealth Performance Standards

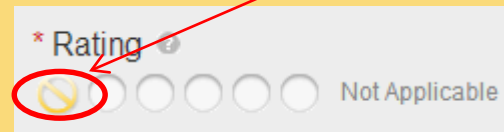
All Employees


- 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

A red circle highlights the first radio button, which is checked. A red arrow points from the text above to this radio button.

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.

Classified Staff Appraisal

Form Layout

Employee
Review

Manager
Review

Employee
Signature

Manager
Signature

Employee

Incomplete
Items

Information Bar

Support
Information

Route Map

UTHealth Performance Standards

Performance Goals

Employee Summary of Overall Performance

Manager Summary of Overall Performance

Signatures

*Standard Annual Appraisal Form 2.0 for Alex Anderson

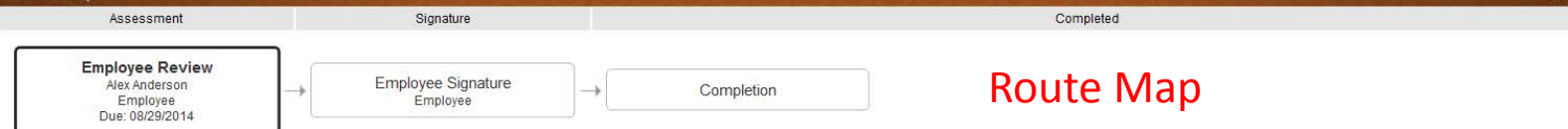


* 9
Incomplete Items

Information Bar

Route Map

Hide



Route Map

UTHealth Performance Standards

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

Performance Standards

Hide Instruction

Exhibits Required Job Knowledge

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

* Rating
 (5 circles, 1st is selected) unrated

Alex's Comment
Comments not provided

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.

Performance Goals

Hide Instruction

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

Rich text editor with toolbar (Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, Size, Color, Background Color)

Save and Finish Later

Send to Manager Review

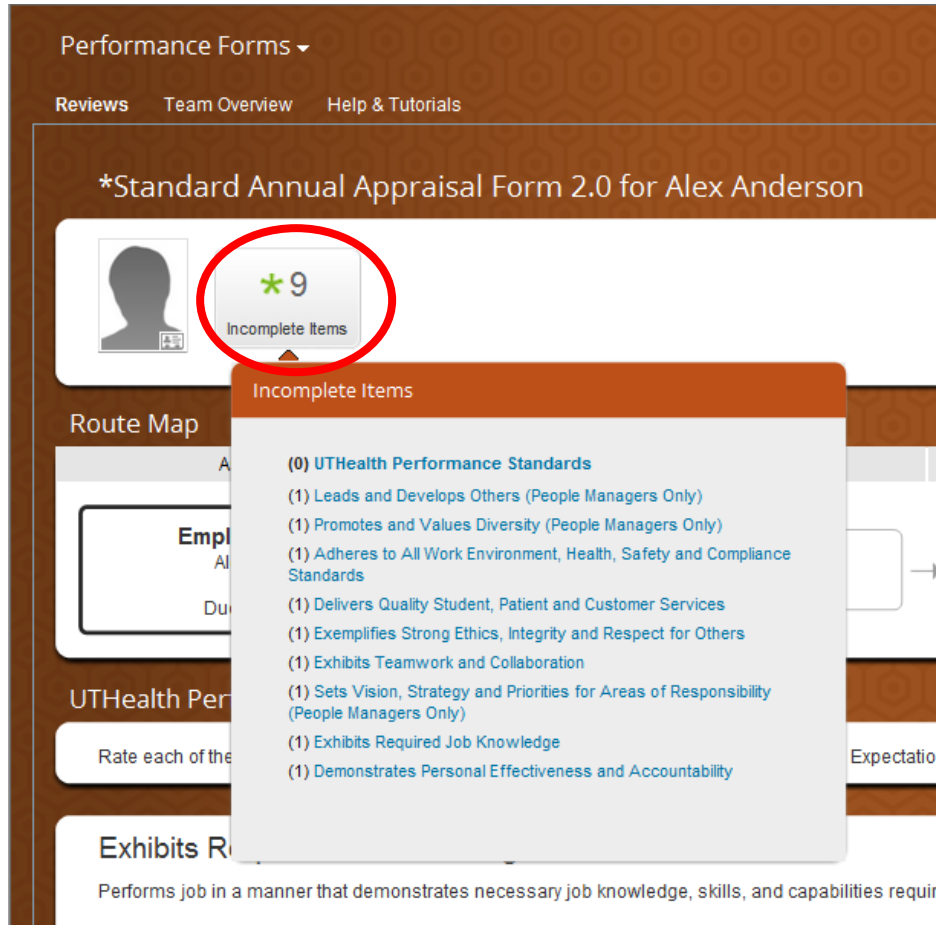
* To finalize, please complete 9 missed fields

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 a web interface for a performance appraisal form. At the top, there is a navigation bar with "Performance Forms" and sub-links for "Reviews", "Team Overview", and "Help & Tutorials". Below this, a title bar reads "*Standard Annual Appraisal Form 2.0 for Alex Anderson". A profile picture placeholder is visible on the left. A button labeled "Incomplete Items" with a green asterisk and the number "9" is circled in red. 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

Other visible text in the interface includes "Route Map", "Employment", "UTHealth Per", "Rate each of the", "Exhibits R", and "Expectatio".

COMPLETING YOUR EMPLOYEE REVIEW



Steps for Completing the Employee Review



1

Access Your Appraisal Form

2

Rate and enter comments for UHealth Performance Standards

3

Rate and enter comments for each Performance Goal

4

Optional: Print Form for Discussion with Manager

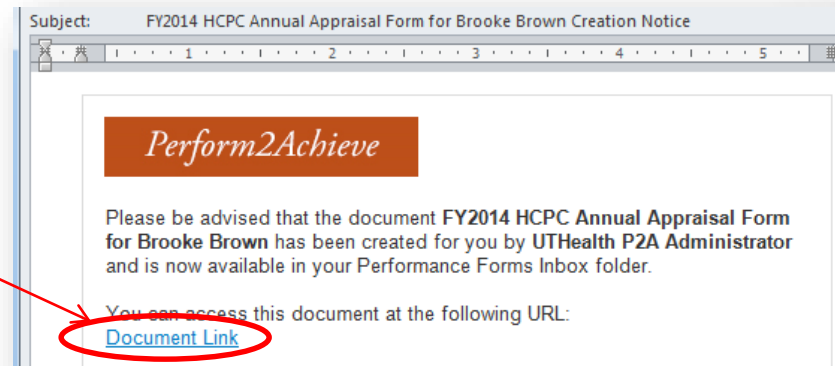
5

Save and Send to Manager Review

Accessing Your Appraisal

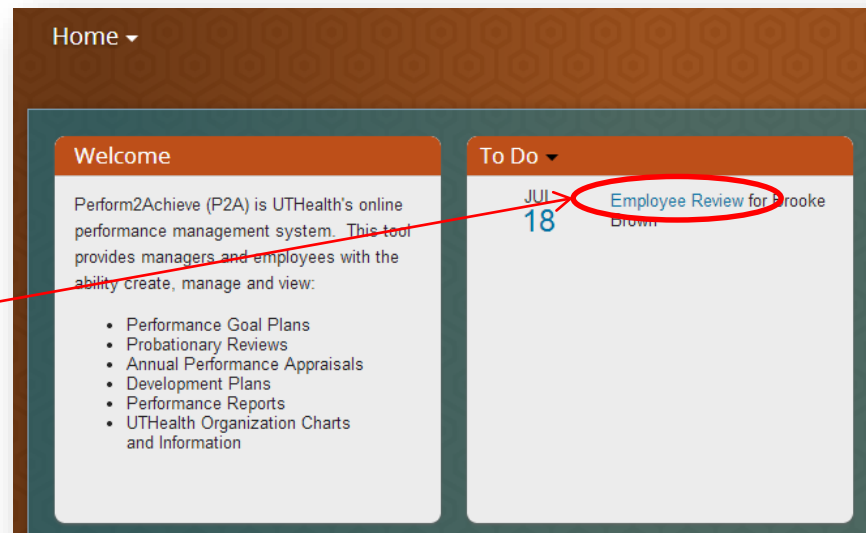
Method 1

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”



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 'Writing Assistant' tool interface. At the top, a performance standard is displayed: 'Demonstrates Personal Effectiveness and Accountability'. Below this, a description of the standard is provided. The main area is titled 'Your rating on Brooke's competency' and features a 5-point rating scale. A 'Writing Assistant' button is circled in red and labeled with a yellow star and the number 1. Below the rating scale, there are three columns of competency phrases: 'Improve', 'Meets', and 'Exceeds'. The 'Exceeds' column is circled in red and labeled with a yellow star and the number 2. A red arrow points from the 'Exceeds' column to the 'Preview Quote Below' section. In this section, there is a 'Select a Narrative' dropdown with 'Brooke' selected and 'You' as an option. Below this, there is an 'Adjust the positivity' slider with a minus sign, a plus sign, and a yellow star with the number 3. At the bottom right, there is a 'Place Quote' button circled in red and labeled with a yellow star and the number 4. In the top right corner of the tool, there is a close button (an 'x' in a circle) circled in red and labeled with a yellow star and the number 5.

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

Performance Goals

Service Excellence

Increase % of projects completed on time to from 70% to 90 %. [Edit](#)

CPP Project Database, monthly measure.

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

Alex's Comment
Comments not provided

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

Goal Name	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"

Printing Your Appraisal Form

Optional

The image shows a browser window displaying the Perform2Achieve system. The browser's address bar shows the URL: https://performancemanager4.successfactors.com/xi/ui/pm2/pages/review/selfreviewPrint.xhtml?folderMapId=6057&pmr_tm=1403210009364&pmr_ck=pc&pmr_fmh=yvcAlHAB4tVgjd5Udd0W0XqJ.... The browser window has a search bar with "People Search" and a "Print" icon in the top right corner, highlighted with a yellow star and the number "1". A red arrow points from this icon to the print button on the appraisal form. The appraisal form is titled "FY2014 Annual Appraisal Form: Brooke Brown" and has a "Print" button at the top, highlighted with a red circle and a yellow star and the number "2". The form content includes an introduction, a rating scale, and three performance standards: "Demonstrates Personal Effectiveness and Accountability", "Delivers Quality Student, Patient and Customer Services", and "Exhibits Teamwork and Collaboration". Each standard has a rating scale and a "Brooke's Comment" section.

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"

The image shows a printing dialog box on the left and an appraisal form on the right. The dialog box has several sections with yellow callout boxes:

- 5**: The "Print" button in the top right corner.
- 3**: The printer selection "HP LaserJet Professional" in the "Destination" section.
- 4**: The "Pages" section, which includes radio buttons for "All" and "e.g. 1-5, 8, 11-13", a "Copies" field set to 1, and "Layout" options for "Portrait" and "Landscape".

The appraisal form on the right is titled "FY2014 Annual Appraisal Form: Brooke Brown". It includes an "Introduction" section with a "Rating Scale" from 1.0 to 5.00. Below that are "UTHealth Performance Standards" with sections for "Demonstrates Personal Effectiveness and Accountability", "Delivers Quality Student, Patient and Customer Services", "Exhibits Teamwork and Collaboration", "Exemplifies Strong Ethics, Integrity and Respect for Others", and "Adheres to All Work Environment, Health, Safety and Compliance". Each section has a "Rating" and "Brooke's Comment" field.

Sending Your Appraisal to Manager Review

Once you have rated and entered comments for each UHealth Performance Standard and Performance Goal, 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

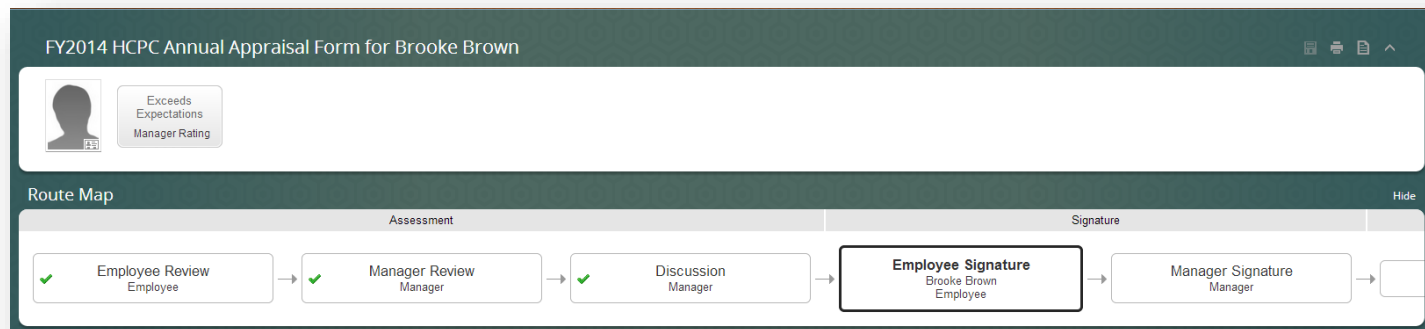
4

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

Signing Your Appraisal Form

1. Scroll to the bottom of the form
2. OPTIONAL: enter comments
3. Click on the “Sign and Send to Manager Signature” button.

You have not completed your performance appraisal activities.



The screenshot shows the 'Signature' section of the appraisal form. It is titled 'Signature' and contains the following text: '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.' Below this text is a text area labeled 'Brooke's Comment' with a rich text editor toolbar. At the bottom of the form, there is a button labeled 'Sign and Send to Manager Signature' (highlighted with a red box). Below the button, there is a note: 'Alex Anderson has not signed yet'. At the bottom of the page, there is another button labeled 'Sign and Send to Manager Signature' (highlighted with a red box).

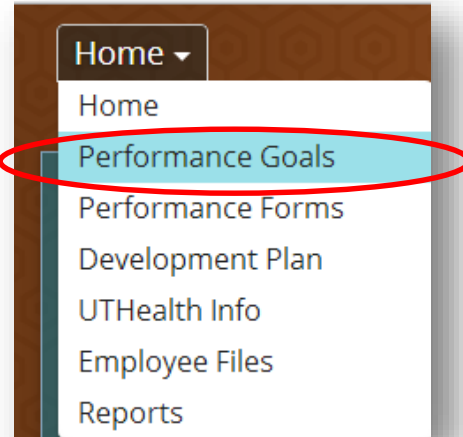
ENTERING PERFORMANCE GOALS FOR NEXT YEAR

3

Enter 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 goal plan for the next fiscal year.