ePerformance Review Process - Staff

Agenda

- What is ePerformance?
- Why Change?
- New ePerformance Advantages
- Establishing & Weighting Criteria
- ePerformance Tour
What is ePerformance?

- An electronic PCD:
  - Automated evaluation process for both manager and employee managed via PeopleSoft
  - Job Descriptions / Responsibilities
  - Goals
  - UH Initiatives
  - Competencies

Why Change?
Advantages of ePerformance

- Administratively efficient
- Promotes ongoing feedback
- Encourages consistency
- Will align with training & development opportunities
- Is flexible
What is the Performance Criteria?

- **Criteria**: a standard on which a judgment or decision may be made (Merriam Webster)

- **ePerformance Criteria**
  - Section 1: Mission Statement
  - Section 2: Initiatives
  - Section 3: Employee Goals
  - Section 4: Responsibilities
  - Section 5: Customer Service
  - Section 6: Competencies
How is Criteria Weighted?

- Not Weighted:
  - Mission Statement
  - Initiatives

- Weighted:
  - Goals
  - Responsibilities
  - Customer Service
  - Competencies
    - 100%

- Minimums:
  - 10%
  - 40%
  - 10%
  - 10%
  - 70%

Weighting Items within Sections

- Within certain sections, the manager can add items.
  - Goals Section
    - Goal # 1
    - Goal # 2
    - Goal # 3

- All sections items need to total 100% within that section.
**Weightings Example**

- **Goals** 25% (min. 10%)
  - Goal #1 50%
  - Goal #2 50%

- **Responsibilities** 50% (min. 40%)
  - Responsibility #1 20%
  - Responsibility #2 70%
  - Responsibility #3 10%

- **Customer Service** 15% (min. 10%)
  - Section Item N/A

- **Competencies** 10% (min. 10%)
  - Competency #1 40%
  - Competency #2 60%

**ePERFORMANCE PROCESS**

1. HR creates Performance Documents
2. Manager attends training
   - HR & Manager partner to communicate ePerformance transition to employees
3. Manager establishes Performance Criteria
4. Workflow notification sent to employees with link to document
Example Email to Employee

Subject: Performance Criteria Completed

Greetings from HR,

In an effort to improve and enhance our performance management at UH/HSC, our annual performance review process has experienced a complete transformation. The former PCP process has been retired and replaced with the more flexible, convenient and paperless ePerformance system.

This auto-mated email is to notify you that your manager has completed the first step in the process: establishing your performance criteria. (Please do not respond to this auto-mated email.)

And now, you have the opportunity to view the document and to become familiar with the criteria established.

Please review by navigating to the following link:


COMPLETE

Thank you,
Human Resources

(Please do not respond to this automatic notification.)

ePerformance Tour
Employee View

- P.A.S.S.
  - Main Menu
    - Self Service
      - Performance Management
        - My Performance Documents
          - Current Documents

Employee View

Document Details
Thomas Lapaglia, Coord, Dept HR/Payroll 2
Performance Document: 01/01/2010 - 12/31/2010

<table>
<thead>
<tr>
<th>Performance Document Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee: Thomas Lapaglia</td>
</tr>
<tr>
<td>Document Type: Performance Document</td>
</tr>
<tr>
<td>Manager: Zagu Parades</td>
</tr>
<tr>
<td>Template Name: UH Staff Performance CY2010</td>
</tr>
</tbody>
</table>

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<th></th>
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<tbody>
<tr>
<td>Document Progress</td>
<td></td>
</tr>
<tr>
<td>Step</td>
<td>Status</td>
</tr>
<tr>
<td>Establish Performance Criteria</td>
<td>Completed</td>
</tr>
<tr>
<td>Review Manager Evaluation</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

View
Section 2 – Initiatives

National Competitiveness

**Details**

**Description:** UH will become a nationally competitive public research university as measured by the Top American Public Research University analyst and/or Carnegie Foundation for the Advancement of Teaching.

Student Success

**Details**

**Description:** UH will have a student profile consistent with a nationally competitive public research university by creating an environment in which student success can be ensured.
Section 3 – Employee Goals

Employee Goals will be evaluated by: Manager

Increase Customer Satisfaction

<table>
<thead>
<tr>
<th>Description: Increase customer satisfaction ratings to 80% satisfactory or above for student assistance. Distribute customer service survey by 07/15/10 and redistribute by 11/15/20 to evaluate progress.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Maintain Monthly Reports:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Description: Compile data for and run Allocation Report by the 5th of every month and distribute appropriately. Reconcile errors and communicate status to clients.</th>
</tr>
</thead>
</table>

Goals: Section Summary

| Section Weight: 20 % |
| (not less than 10%) |

Section 4 - Responsibilities

Finance-Duty

| Item Weight: 0 % |

| Details |
| Description: Oversees audits of all payroll paperwork which may include: timesheets, paychecks, payroll reports, and Personal Action Requests (PARs). |

Finance-Duty

| Item Weight: 15 % |

| Details |
| Description: Monitors payroll and human resource functions of a college, division, or unit within. |

Finance-Duty

| Item Weight: 25 % |

| Details |
| Description: May perform monthly verifications of funding for all salaries using various reports. |
Sections 5 & 6: Competencies

Section 5 & 6 – Competencies

• What is a competency? It is the specific...
  – Behavior (ex. adaptability)
  – Knowledge/Skills (ex. safety awareness)
  – Motivation (ex. passion for results)

that an employee must demonstrate in order to be effective in a given job.*

*Copyright DDI
**Section 5 & 6 – Competencies**

- What are advantages of incorporating competencies?
  - Creates a platform of consistent standards
  - Promotes relevant development opportunities

- How were competencies determined?
  - Partnered with DDI to build a library
  - Established a core competency: Customer Service
  - Established competency clusters according to job category.

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**Competency Matrix (partial screenshot)**

<table>
<thead>
<tr>
<th>Job Level</th>
<th>Core Competency</th>
<th>Job Competency</th>
<th>Coach and Develop Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director</td>
<td>Customer Service</td>
<td>Business Savvy</td>
<td>Building Org Talent</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Customer Service</td>
<td>Building Partnerships</td>
<td>Team Building</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>Customer Service</td>
<td>Planning and Organizing</td>
<td>Selecting Talent</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lead</td>
<td>Customer Service</td>
<td>Building Work Relationships</td>
<td>Team Building</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional</td>
<td>Customer Service</td>
<td>Building Work Relationships</td>
<td>Managing Conflict</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clerical</td>
<td>Customer Service</td>
<td>Managing Conflict</td>
<td>Collaboration</td>
</tr>
</tbody>
</table>

[http://www.uh.edu/hr/emprelations/eperformance.htm](http://www.uh.edu/hr/emprelations/eperformance.htm)
Customer Service (Core Competency)

- Supports the UH System-Wide Effort
  - To meet and surpass customers’ expectations

- Supports our road to Tier 1 Status
  - Delineates us from the competition
    “If we don’t take care of our customers, someone else will.” – unknown

ePerformance Tour
Section 5 - Customer Service
(core competency)

Customer Service will be evaluated by: Manager

Customer Focus

Details
Description: Ensuring that the customer perspective is a driving force behind business decisions and activities; crafting and implementing service practices that meet customers' and own organization's needs.

Section Summary

Section Weight: 10 %
(not less than 10%)

Section 6 – Job Competencies

Communication

Details
Description: Clearly conveying information and ideas through a variety of means to individuals or groups in a manner that enables the audience to understand and retain the message.

Decision Making

Details
Description: Identifying and understanding issues, problems, and opportunities; comparing data from different sources to draw conclusions; using effective approaches for choosing a course of action or developing appropriate solutions; taking action that is consistent with available facts, constraints, and probable consequences.
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<td>Completed</td>
<td>11/01/2010</td>
</tr>
<tr>
<td>Review Manager Evaluation</td>
<td>Not Started</td>
<td>03/31/2011</td>
</tr>
</tbody>
</table>

Return to Select Documents  Maintain Performance Notes

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Adding a New Note

Performance Notes

Instructions

<table>
<thead>
<tr>
<th>Selection Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID: 0942293</td>
</tr>
<tr>
<td>Earliest Note Date:</td>
</tr>
</tbody>
</table>

Add a New Note
Creating a Note

Subject: Resolved Issue with Upset Client
Note Text: Last Friday on 10/8/10 Mary transferred an upset client to me regarding a misrouted report. Initially, the client was verbally upset but I was able to reassure her that we could meet her needs. I gave her two options to choose from and she chose the have the report scanned. By the calls end she was at ease.

Save

Return To: Performance Note Selection

Returning to Notes

<table>
<thead>
<tr>
<th>Existing Performance Notes for this Employee</th>
<th>Customize</th>
<th>Find</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>Subject</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/11/2019 2:13PM</td>
<td>Resolved Issue with Upset Client</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>10/11/2019 2:05PM</td>
<td>Client Recognition</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Selected Note(s)
Delete

Select All Notes
Clear Selections
Next Steps and Q & A

- Watch for the automated email from HR.
  - DO NOT RESPOND!

- Familiarize yourself with your Established Criteria.

- Have questions about the criteria?
  - Ask your manager or HR.

- Keep notes on yourself. Document successes!

- Wait for more information in early 2011.