

# 2022 Performance Evaluation

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## EMPLOYEE PROCESS GUIDE

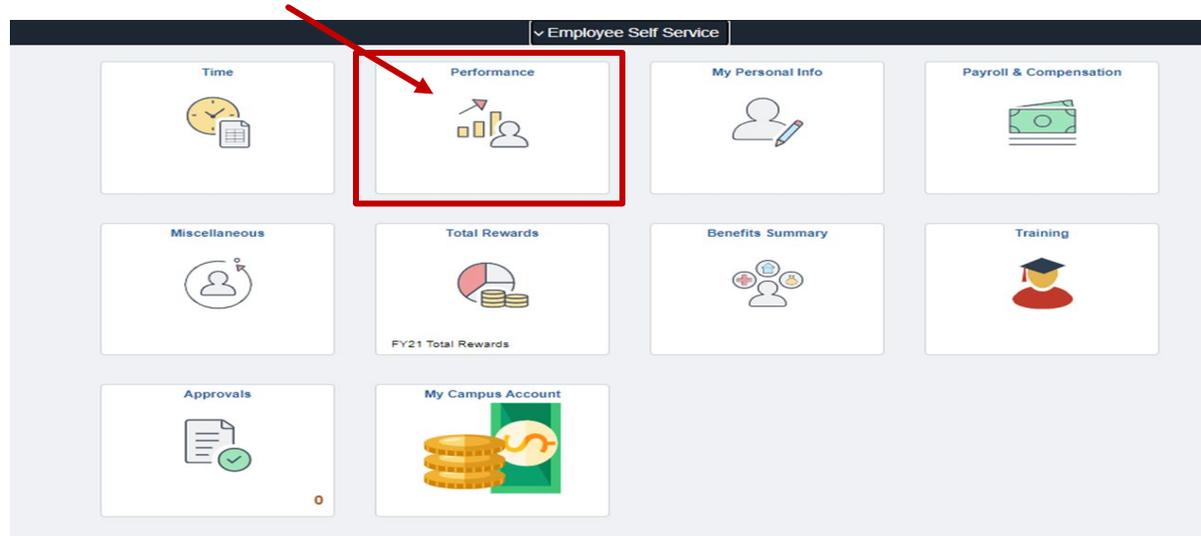
(UH Staff, Trades, and Research Staff)

# ***ESTABLISHING GOALS***

# ESTABLISHING GOALS AS THE EMPLOYEE

## STEP 1:

From the PeopleSoft home screen, select the ePerformance icon.

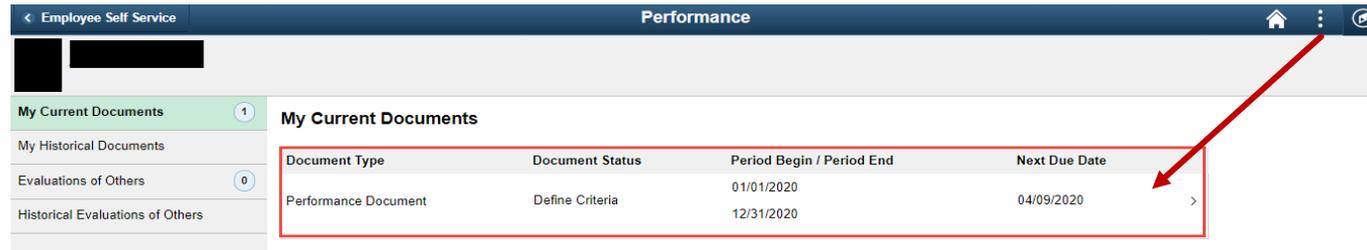


The screen will display your current performance document.

Document Type	Document Status	Period Begin / Period End	Next Due Date
Performance Document	Define Criteria	01/01/2020 12/31/2020	04/09/2020 >

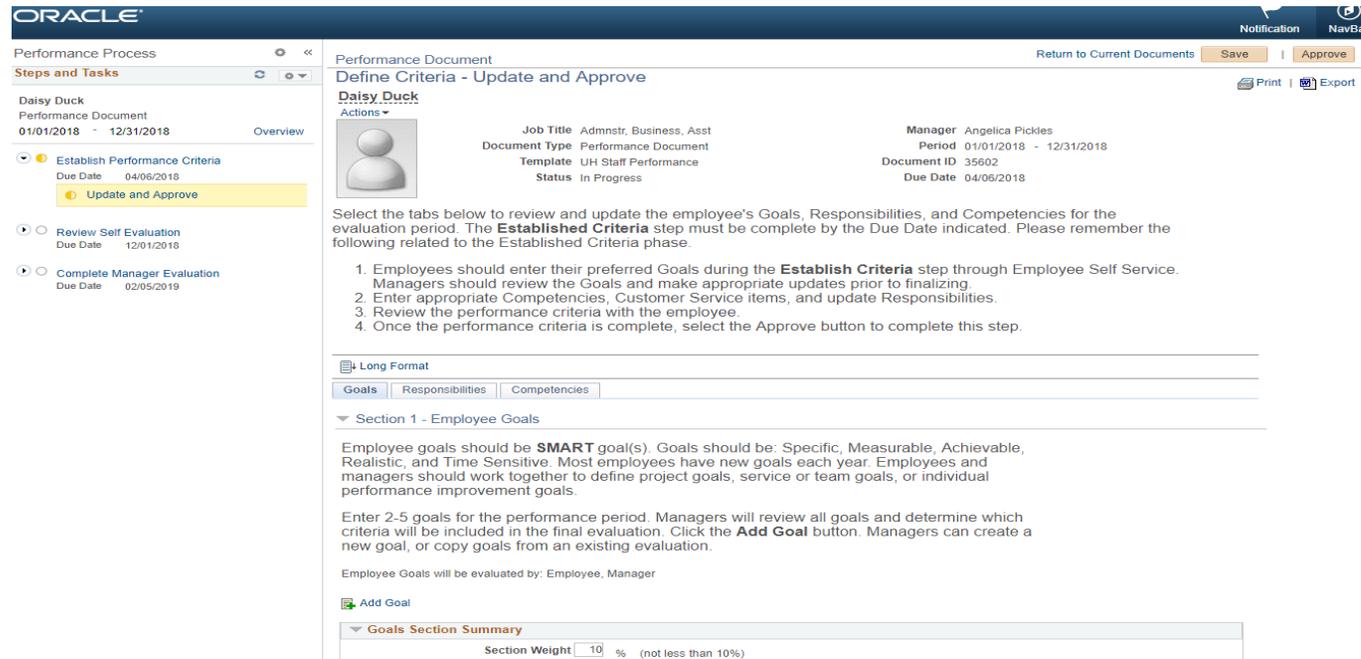
## STEP 2:

Click anywhere in the display box and your document will open up. You're ready to begin establishing your Goals.



Document Type	Document Status	Period Begin / Period End	Next Due Date
Performance Document	Define Criteria	01/01/2020 12/31/2020	04/09/2020

The screen will display your Define Criteria screen.



**ORACLE**

Performance Process Performance Document Return to Current Documents Save Approve

**Steps and Tasks**

- Establish Performance Criteria  
Due Date 04/06/2018  
**Update and Approve**
- Review Self Evaluation  
Due Date 12/01/2018
- Complete Manager Evaluation  
Due Date 02/05/2019

**Daisy Duck**  
Performance Document  
01/01/2018 - 12/31/2018 Overview

**Define Criteria - Update and Approve**

**Daisy Duck**  
Actions

**Job Title** Admnstr. Business, Asst  
**Document Type** Performance Document  
**Template** UH Staff Performance  
**Status** In Progress

**Manager** Angelica Pickles  
**Period** 01/01/2018 - 12/31/2018  
**Document ID** 35602  
**Due Date** 04/06/2018

Select the tabs below to review and update the employee's Goals, Responsibilities, and Competencies for the evaluation period. The **Established Criteria** step must be complete by the Due Date indicated. Please remember the following related to the Established Criteria phase.

1. Employees should enter their preferred Goals during the **Establish Criteria** step through Employee Self Service. Managers should review the Goals and make appropriate updates prior to finalizing.
2. Enter appropriate Competencies, Customer Service items, and update Responsibilities.
3. Review the performance criteria with the employee.
4. Once the performance criteria is complete, select the Approve button to complete this step.

Long Format

**Goals** | Responsibilities | Competencies

Section 1 - Employee Goals

Employee goals should be **SMART** goal(s). Goals should be: Specific, Measurable, Achievable, Realistic, and Time Sensitive. Most employees have new goals each year. Employees and managers should work together to define project goals, service or team goals, or individual performance improvement goals.

Enter 2-5 goals for the performance period. Managers will review all goals and determine which criteria will be included in the final evaluation. Click the **Add Goal** button. Managers can create a new goal, or copy goals from an existing evaluation.

Employee Goals will be evaluated by: Employee, Manager

**Add Goal**

**Goals Section Summary**

Section Weight  % (not less than 10%)

## Under the Goals Tab select Add Goal

### Define Criteria - Update

Select the tabs below to review and/or update your Goals, Responsibilities, and Competencies for the evaluation period. The **Established Criteria** step must be completed by the Due Date indicated. Please remember the following related to the Established Criteria phase.

1. Employees should enter their preferred Goals during the **Establish Criteria** step.
2. Click the Save button.
3. Managers will review preferred Goals, Responsibilities, and Competencies.
4. Once the performance criteria is approved by your manager, it will be available for review.

 Long Format

Goals

Responsibilities

Competencies

#### ▼ Section 1 - Employee Goals

Employee goals should be **SMART** goal(s). Goals should be: Specific, Measurable, Achievable, Realistic, and Time Sensitive. Most employees have new goals each year. Employees and managers should work together to define project goals, service or team goals, or individual performance improvement goals.

Enter 2-5 goals for the performance period. Managers will review all goals and determine which criteria will be included in the final evaluation. Click the **Add Goal** button.

Employee Goals will be evaluated by: Employee, Manager

 Add Goal

#### ▼ Goals Section Summary

Section Weight  % (not less than 40%)

### STEP 3:

Here you will add your goal. Enter the title, description and employee measurement.

Performance Document

#### Add Your Own Goal

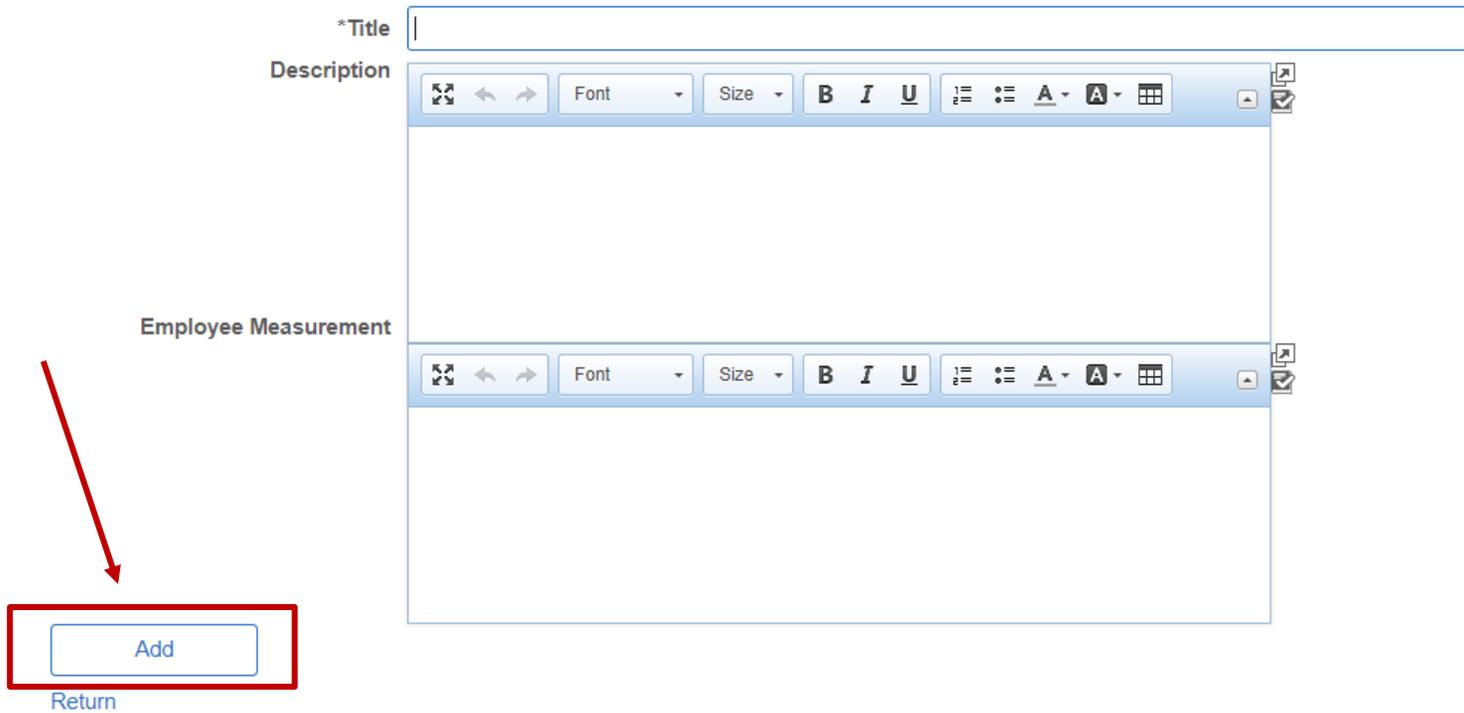
\*Title

Description

Employee Measurement

**Add**

[Return](#)



Once you've entered your goal, click Add.

**This will take you back to your document where you will now see your goal displayed.**  
**Click Save in the top right corner once you've added an item to your document.**

Performance Document

Define Criteria - Update

Enter 2-5 goals for the performance period. Managers will review all goals and determine which criteria will be included in the final evaluation. Click the **Add Goal** button.

Employee Goals will be evaluated by: Employee, Manager

Expand | Collapse | Add Goal

Goal 1: Add your Goal Title here

Description : Add your Description here. Remember SMART Goals.

SMART  
Measurable  
Attainable  
Relevant  
Timely

Employee Measurement : Add how you plan to measure your performance on this goal here.

Example: Notify department managers about documents that have been added/canceled each week, to help managers stay on task of making sure employees have documents completed on time.

Created By Carolyn Allen 02/28/2022 9:43AM  
Last Modified By Carolyn Allen 02/28/2022 9:52AM

Goals Section Summary

Section Weight  % (not less than 40%)



Print | Export

**You'll repeat this process for each goal.**

**The Establishing Goals process is now complete.**