

# 2022 Performance Evaluation

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## MANAGER PROCESS GUIDE

**UH Human Resources - Compensation**

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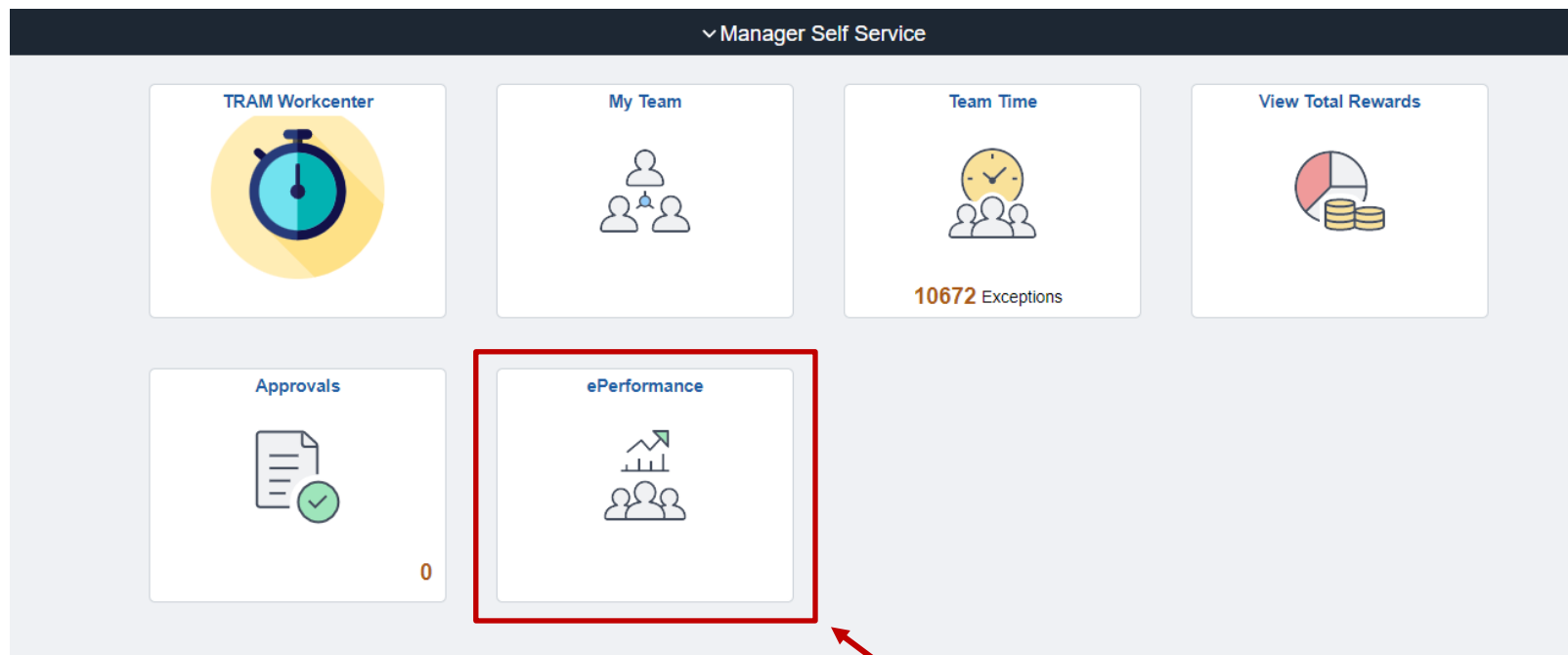
Step 4 Finalize Criteria

**To view a topic directly, click on the title above.**

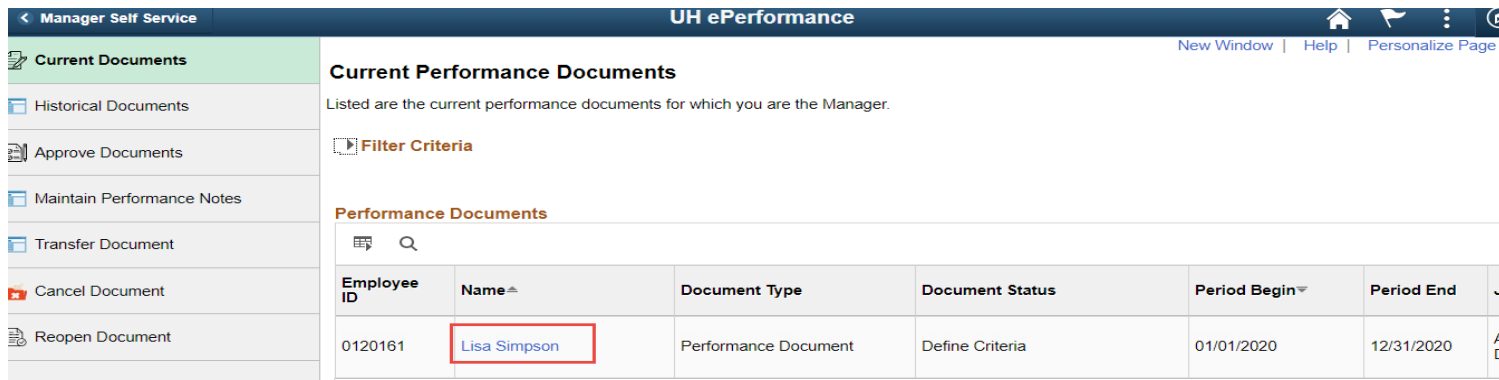
## STEP 1:

### Establishing Criteria

From the PeopleSoft Home Screen select the ePerformance icon.



The screen will display a list of your current employees' performance documents.



UH ePerformance							
<b>Current Documents</b>		<b>Current Performance Documents</b>					
Historical Documents		Listed are the current performance documents for which you are the Manager.					
Approve Documents		<b>Filter Criteria</b>					
Maintain Performance Notes		<b>Performance Documents</b>					
Transfer Document							
Cancel Document							
Reopen Document							
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	J	
0120161	Lisa Simpson	Performance Document	Define Criteria	01/01/2020	12/31/2020	A D	

Click on the employees name and their document will open up to begin establishing criteria.



**ORACLE**

Performance Process

Steps and Tasks

Lisa Simpson  
Performance Document  
01/01/2020 - 12/31/2020

Establish Performance Criteria  
Due Date 04/09/2020

Update and Approve

Review Self Evaluation  
Due Date 12/09/2020

Complete Manager Evaluation  
Due Date 02/09/2021

Performance Document

Define Criteria - Update and Approve

Lisa Simpson

Job Title Adminstr, Business, Department

Document Type Performance Document

Template UH Mgmt Performance

Status In Progress

Manager Dory Fish

Period 01/01/2020 - 12/31/2020

Document ID 43151

Due Date 04/09/2020

Select the tabs below to review and update the employee's Goals, Responsibilities, and Competencies for the evaluation period. The **Established** 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 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

## Select Add Goal

### ▼ 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%)

As the manager, you can select to either Add your Own Goal, Copy a Goal from your own Document, or Copy a goal from My Team's Documents. Goals must be created in another evaluation prior to using the copy functions.

### Performance Document

#### Add Goal

You have chosen to add a new goal.

You can either enter a new goal on your own, or copy a goal from another evaluation. To copy a goal from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☐ Add your own goal
- ☐ Copy goal from My Document
- ☐ Copy Goal from My Team's Documents

Next

[Return](#)

Select Add your own goal and click Next

## Performance Document

### Add Goal

You have chosen to add a new goal.

You can either enter a new goal on your own, or copy a goal from another evaluation. To copy a goal from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☐ Add your own goal
- ☐ Copy goal from My Document
- ☐ Copy Goal from My Team's Documents

Next

[Return](#)

Here you will add your employee's goal by entering the Title, Description and Employee Measurement.

The screenshot shows a web form titled "Performance Document" with a sub-header "Add Your Own Goal". Below this, there are three main input areas: "Title", "Description", and "Employee Measurement". Each area has a text input field and a rich text editor toolbar. The "Title" field contains the placeholder text "Add your Goal Title here". The "Description" field contains the placeholder text "Add your Goal Description here. Remember SMART Goals." followed by a list of SMART criteria: S - Smart, M - MEASURABLE, A - ACHIEVABLE, R - REALISTIC, and T - TIME SENSITIVE, and an example sentence. The "Employee Measurement" field contains the placeholder text "Add how you plan to measure the employee's performance coming this goal here." followed by an example sentence. At the bottom left, there is a yellow "Add" button and a blue "Return" link. Red arrows point from the text above to each of these elements: the "Add Your Own Goal" section, the "Title" field, the "Description" field, the "Employee Measurement" field, and the "Add" button.

Performance Document

Add Your Own Goal

\*Title Add your Goal Title here

Description

Add your Goal Description here. Remember SMART Goals.  
S - Smart  
M - MEASURABLE  
A - ACHIEVABLE  
R - REALISTIC  
T - TIME SENSITIVE  
Example: Streamline ePerformance process to better assist with the community throughout the calendar year.

Employee Measurement

Add how you plan to measure the employee's performance coming this goal here.  
Example: Notify departments/managers about documents that have been added/cancelled each week to help managers stay on task of making sure employees have documents completed on time.

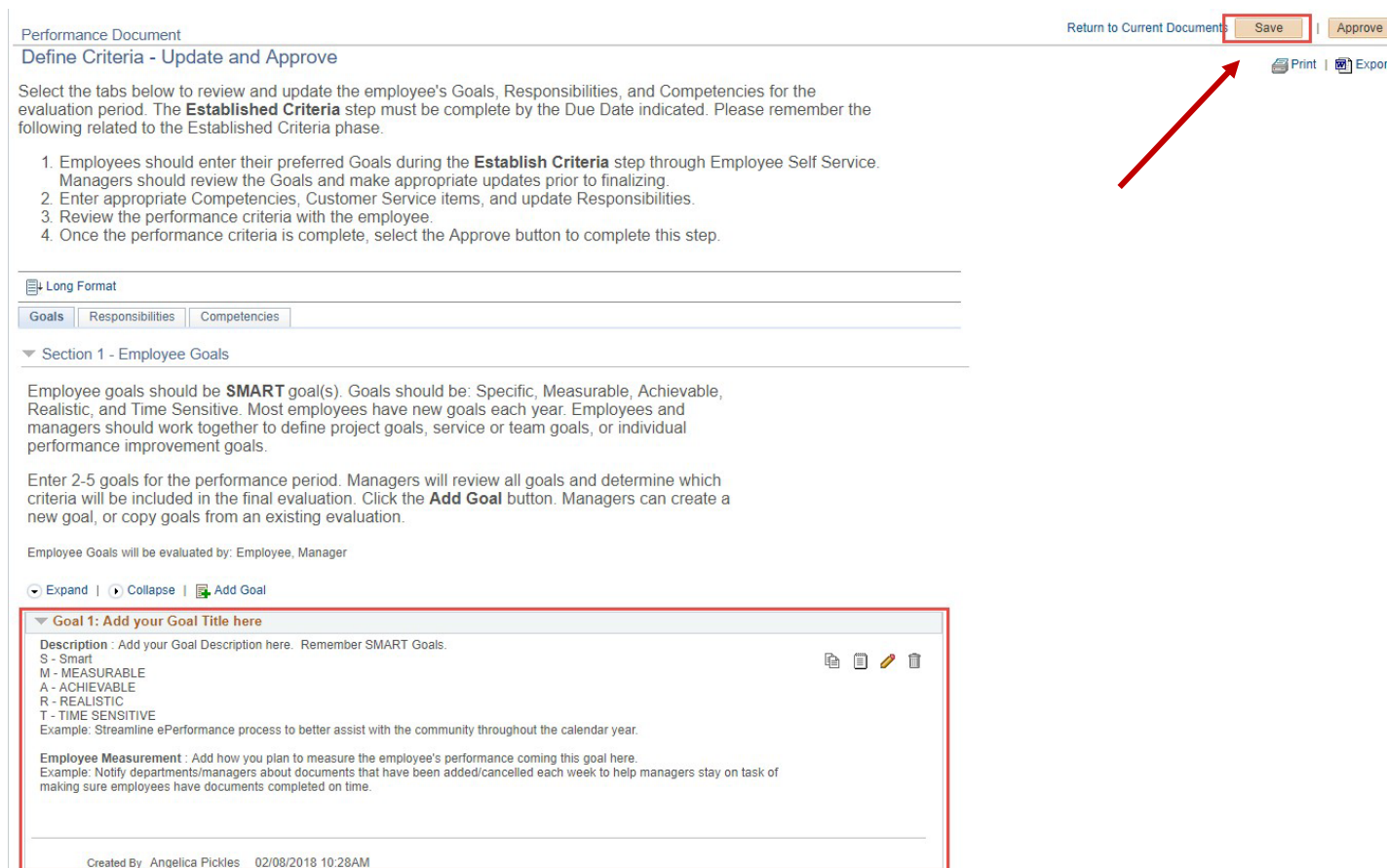
Add

Return

Any goals added should be SMART and must be attainable by the end of the year.  
After entering each goal, click Add.

This will take you back to your employee's document where you will now see your employee's goal displayed.

Click Save



Performance Document

Return to Current Documents | **Save** | Approve

Define Criteria - Update and Approve

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

Expand | Collapse | Add Goal

Goal 1: Add your Goal Title here

Description : Add your Goal Description here. Remember SMART Goals.

S - Smart  
M - MEASURABLE  
A - ACHIEVABLE  
R - REALISTIC  
T - TIME SENSITIVE

Example: Streamline ePerformance process to better assist with the community throughout the calendar year.

Employee Measurement : Add how you plan to measure the employee's performance coming this goal here.  
Example: Notify departments/managers about documents that have been added/cancelled each week to help managers stay on task of making sure employees have documents completed on time.

Created By: Angelica Pickles 02/08/2018 10:28AM

To add additional goals repeat this same process.

After all goals have been entered, you will now need to complete the Responsibilities section.



## STEP 2a:

### Responsibilities

A list of your employee's responsibilities is displayed in Section 2 (or Section 3 if they had no Managerial Responsibilities). These responsibilities are pulled directly from your employee's job description. These duties are built into the document so there is no option to edit them, only delete them. To see the description under each of these duties select Expand.

Select the Responsibilities Tab where additional sections can be found.

**Section 2** – **Managerial Responsibilities**: If your employee is a manager or has management responsibilities, they will have an additional section called Managerial Responsibilities.

**Section 3** – **Responsibilities**: A list of your employee's current job duties pulled directly from their job description.

Performance Document

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**Define Criteria - Update and Approve**

Document type	Performance Document	Period	01/01/2020 - 12/31/2020
Template	UH Mgmt Performance	Document ID	43151
Status	In Progress	Due Date	04/09/2020

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.

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[Long Format](#)

Goals **Responsibilities** Competencies

**Section 2 - Managerial Responsibilities**

A manager responsibility is a task, action, or obligation that is a part of a management position or assignment. This section should contain leadership and managerial responsibilities such as sets objectives, organizes, motivates and communicates, measures, and develops employees.

Enter 2-4 manager responsibilities for the performance period. Click the **Add Item** button. Managers can create a new responsibility, or copy responsibilities from an existing evaluation.

Managerial Responsibilities will be evaluated by: Employee, Manager

[Add Item](#)

**Section 3 - Responsibilities**

A responsibility is a task, action, or obligation that is part of your specific position or assignment and most often has a frequency and quality associated with it. This section of the evaluation comes directly from the job description. If the job duties in this section have changed, or are not specific enough, managers should edit by adding and deleting criteria to fit the employee's actual job duties. Ideally employees should be evaluated on 4-6 responsibilities.

Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Responsibility](#)

► **Responsibility 1: Business Administration- Duty**

► **Responsibility 2: Business Administration- Duty**

## ATTENTION

*If your employee has no Managerial Responsibilities section, skip to Responsibilities section starting on page 18.*

### Managerial Responsibilities Section

#### Select Add Item

##### ▼ Section 2 - Managerial Responsibilities

A manager responsibility is a task, action, or obligation that is a part of a management position or assignment. This section should contain leadership and managerial responsibilities such as sets objectives, organizes, motivates and communicates, measures, and develops employees.

Enter 2-4 manager responsibilities for the performance period. Click the **Add Item** button. Managers can create a new responsibility, or copy responsibilities from an existing evaluation.

Managerial Responsibilities will be evaluated by: Employee, Manager

 **Add Item**

As the manager, you can select to either Add your own item, Copy items from your own documents, or Copy items from another one of your employee's documents. Please note, Responsibilities must be created in another evaluation prior to using the copy functions.

##### Performance Document

#### **Add Item**

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☐ Add your own Item
- ☐ Copy item from my Documents
- ☐ Copy Item from My Team's Documents

**Next**

[Return](#)

## To Add Your Own Item

Select Add your own Item and click Next

### Performance Document

#### Add Item

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- 
- ☒ Add your own Item
  - ☐ Copy item from my Documents
  - ☐ Copy Item from My Team's Documents

Next

[Return](#)

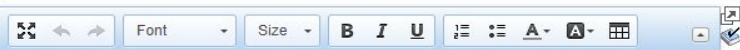
You'll be automatically directed to the Add Your Own Item screen.

### Performance Document

#### Add Your Own Item

\*Title

Description



Add

**Enter the title and description** of the Managerial Responsibility you are establishing. The responsibility set here should be separate from the employees regular responsibilities outlined in the Responsibilities section. After entering your information click, **Add**.

Performance Document

**Add Your Own Item**

\*Title

Description 

Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate

**Add**

[Return](#)

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

Performance Document

[Return to Current Documents](#) **Save** **Approve**

**Define Criteria - Update and Approve**

Enter 2-4 manager responsibilities for the performance period. Click the **Add Item** button. Managers can create a new responsibility, or copy responsibilities from an existing evaluation.

Managerial Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Item](#)

**Managerial Responsibility 1**





**Description** : Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate

Created By Dory Fish 06/10/2020 9:24AM

To **add** additional managerial responsibilities repeat these steps.

- To *edit* the responsibility, select the pencil icon





▼ **Managerial Responsibility 1**

**Description** : Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate    

Created By Dory Fish 06/10/2020 9:24AM

- To *delete* the responsibility, select the trash can icon

▼ **Managerial Responsibility 1**

**Description** : Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate    

Created By Dory Fish 06/10/2020 9:24AM

## To Copy from Another Document

Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

Select Copy item from my Documents or Copy item from My Team's Documents (whichever is needed) and click **Next**.

### Performance Document

---

#### Add Item

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☐ Add your own Item
- ☐ Copy item from my Documents
- ☐ Copy Item from My Team's Documents

**Next**

[Return](#)

If there are not any items to copy, you will receive a pop-up telling you that there are no items found. Click **OK**.

The screenshot shows the 'Performance Document' 'Add Item' interface. A pop-up message states: 'No Items were found to be copied. (4601,359). There are no items found matching your criteria that could be copied.' The 'OK' button in the pop-up is highlighted with a red box and a red arrow. In the background, the 'Add Item' screen has three radio button options: 'Add your own Item', 'Copy item from my Documents' (which is selected), and 'Copy Item from My Team's Documents'. There are 'Next' and 'Return' buttons at the bottom of the form.

If there are items to copy, you'll be re-directed to a screen that automatically populates the beginning of the current year(Example: 01/01/2020).

- If you've already established items on an employee's document, you can leave this date as is.
- If you need to select items from a prior years document, you'll update this date to 01/01/YYYY and select Filter.

#### Performance Document

##### Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

The screenshot shows the 'Filter Criteria' section of the 'Select a Document' screen. It includes input fields for 'First Name' and 'Last Name', a 'Document Type' dropdown menu, and a 'Document Status' dropdown menu. A 'Period Between' section contains two date pickers, with the first one set to '01/01/2019'. The 'Filter' button is highlighted with a red box and a red arrow. A 'Clear' button is also present.

Click **Select** on the employee's document you want to copy items from.

Select	Name	Document Type	Document Status	Period Begin▲	Period End
<b>Select</b>	Lisa Simpson	Performance Document	Completed	01/01/2019	12/31/2019

Previously established items will automatically populate.

#### Performance Document

##### Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

##### Copy from Document

Name	Lisa Simpson	Document Type	PERFORM
Section	Managerial Responsibilities	Content Type	
Begin Date	01/01/2019	End Date	12/31/2019

##### Managerial Responsibilities to be copied

<input type="checkbox"/>	Managerial Responsibilities
<input type="checkbox"/>	<a href="#">DBA Leadership</a>

Select All

Deselect All

Copy

Cancel

To view the description of this item select the name hyperlinked in blue.

You'll be re-directed to a description of the item. Once finished viewing the description, select Return.

<input type="checkbox"/>	Managerial Responsibilities
<input type="checkbox"/>	<a href="#">DBA Leadership</a>

##### Item Details

##### Managerial Responsibilities Section

##### DBA Leadership

**Description :** Oversee the business, financial, budget planning, oversight and monitoring for several departments with the Division of Administration & Finance (A&F). Provides supervision of department business services team members and serves as the liaison for senior leadership, directors and staff with other university departments and offices. Provide guidance, support, and development opportunities for all staff and students in your unit as a means of promoting higher levels of job satisfaction and employee loyalty. Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate.

[Return](#)



Select the box to the left of the populated item and click Copy.

#### Managerial Responsibilities to be copied

	<input type="text" value=""/>	<div>1-1 of 1</div>
<input type="checkbox"/>	Managerial Responsibilities	
<input checked="" type="checkbox"/>	DBA Leadership	

Select All

Deselect All

Copy

Cancel

You'll be re-directed back to your employee's current document where the copied item has been added.

Performance Document

[Return to Current Documents](#)

Save

Approve

#### Define Criteria - Update and Approve

 Print |  Export

##### ▼ Section 2 - Managerial Responsibilities

A manager responsibility is a task, action, or obligation that is a part of a management position or assignment. This section should contain leadership and managerial responsibilities such as sets objectives, organizes, motivates and communicates, measures, and develops employees.





Enter 2-4 manager responsibilities for the performance period. Click the **Add Item** button. Managers can create a new responsibility, or copy responsibilities from an existing evaluation.

Managerial Responsibilities will be evaluated by: Employee, Manager

 Expand |  Collapse |  Add Item

##### ► Managerial Responsibility 1

##### ▼ DBA Leadership

**Description :** Oversee the business, financial, budget planning, oversight and monitoring for several departments with the Division of Administration & Finance (A&F). Provides supervision of department business services team members and serves as the liaison for senior leadership, directors and staff with other university departments and offices. Provide guidance, support, and development opportunities for all staff and students in your unit as a means of promoting higher levels of job satisfaction and employee loyalty. Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate.    

- To **edit** the responsibility, select the pencil icon

#### ▼ DBA Leadership

**Description :** Oversee the business, financial, budget planning, oversight and monitoring for several departments with the Division of Administration & Finance (A&F). Provides supervision of department business services team members and serves as the liaison for senior leadership, directors and staff with other university departments and offices.

Provide guidance, support, and development opportunities for all staff and students in your unit as a means of promoting higher levels of job satisfaction and employee loyalty.

Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate.



- To **delete** the responsibility, select the trash can icon.

#### ▼ DBA Leadership

**Description :** Oversee the business, financial, budget planning, oversight and monitoring for several departments with the Division of Administration & Finance (A&F). Provides supervision of department business services team members and serves as the liaison for senior leadership, directors and staff with other university departments and offices.

Provide guidance, support, and development opportunities for all staff and students in your unit as a means of promoting higher levels of job satisfaction and employee loyalty.

Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate.



Select **Save**.

ORACLE®

Return to Current Documents **Save** **Approve**

Performance Document

**Define Criteria - Update and Approve**

▼ Section 2 - Managerial Responsibilities

A manager responsibility is a task, action, or obligation that is a part of a management position or assignment. This section should contain leadership and managerial responsibilities such as sets objectives, organizes, motivates and communicates, measures, and develops employees.

Enter 2-4 manager responsibilities for the performance period. Click the **Add Item** button. Managers can create a new responsibility, or copy responsibilities from an existing evaluation.

Managerial Responsibilities will be evaluated by: Employee, Manager

Expand | Collapse | Add Item

► Managerial Responsibility 1

▼ DBA Leadership

**Description :** Oversee the business, financial, budget planning, oversight and monitoring for several departments with the Division of Administration & Finance (A&F). Provides supervision of department business services team members and serves as the liaison for senior leadership, directors and staff with other university departments and offices.

Provide guidance, support, and development opportunities for all staff and students in your unit as a means of promoting higher levels of job satisfaction and employee loyalty.

Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate.

Print | Export

## **STEP 2b:**

### **Responsibilities Section**

A list of your employee's responsibilities is displayed in Section 3 (or Section 2 if they had no Managerial Responsibilities). These responsibilities are pulled directly from your employee's job description. These duties are built into the document so there is no option to edit them, only delete them.

To see the description under each of these duties select **Expand**.

- If you want to combine some of these duties into one, you will need to add a new responsibility and delete the ones you're combining.
- If some of the duties listed are repetitive or not applicable to this particular employee and you want to remove some of them, you certainly can. Please keep in mind that if you're deleting a majority of the duties because they aren't applicable, it's possible that your employee is in the incorrect job. You will need to reach out to Compensation if that is the case to discuss options.

**See next page for additional instructions.**

## To View Responsibilities

Expand the Responsibilities by 1 of 2 ways;

- Expand All – Select Expand

### Section 3 - Responsibilities

Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#)

#### Responsibility 1: Business Administration- Duty

Description : Serves as the department liaison with Central Payroll, Human Resources, OSP and other department business managers.

Created By Profile 02/07/2020 3:43PM

#### Responsibility 2: Business Administration- Duty

Description : Plans and manages the department's human and financial resources to support department objectives.

Created By Profile 02/07/2020 3:43PM

- Expand Individual Items – Select the arrow to the left of the individual responsibility listed

### Section 3 - Responsibilities

Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#)

#### Responsibility 1: Business Administration- Duty

Description : Serves as the department liaison with Central Payroll, Human Resources, OSP and other department business managers.

Created By Profile 02/07/2020 3:43PM

#### Responsibility 2: Business Administration- Duty

## To Delete Responsibilities

To delete responsibilities, **click the trash can icon.**

### Section 3 - Responsibilities

Responsibilities will be evaluated by: Employee, Manager

 [Expand](#) |  [Collapse](#)

#### ▼ Responsibility 1: Business Administration- Duty

Description : Serves as the department liaison with Central Payroll, Human Resources, OSP and other department business managers.



Created By Profile 02/07/2020 3:43PM

#### ▼ Responsibility 2: Business Administration- Duty

Description : Plans and manages the department's human and financial resources to support department objectives.



Created By Profile 02/07/2020 3:43PM

You'll be asked to confirm you want to delete this responsibility, click Yes - Delete.

### Performance Document

#### Delete Confirmation



Are you sure you want to delete (Business Administration - Duty)?

**Yes - Delete**

No - Do Not Delete

After deleting, you'll be re-directed back to your employee's document.  
The deleted responsibilities will no longer be displayed.

### Define Criteria - Update and Approve

A responsibility is a task, action, or obligation that is part of your specific position or assignment and most often has a frequency and quality associated with it. This section of the evaluation comes directly from the job description. If the job duties in this section have changed, or are not specific enough, managers should edit by adding and deleting criteria to fit the employee's actual job duties. Ideally employees should be evaluated on 4-6 responsibilities.

Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Responsibility](#)

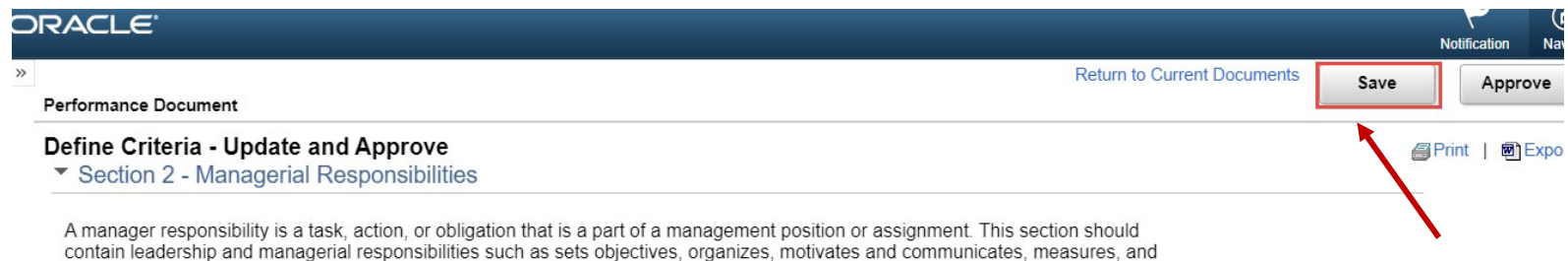
#### ▼ Responsibility 1: Business Administration - Duty

Description : Plans and manages the department's human and financial reasources to support department objectives.



Created By Profile 02/07/2020 3:43PM

Click **Save** in the top right corner once you've added an item to your employee's document.  
Repeat this process to delete any additional responsibilities.



## To Add Responsibilities

As the manager, you can select to either Add your own item, Copy items from your own documents, or Copy items from another one of your employee's documents. Please note, Responsibilities must be created in another evaluation prior to using the copy functions.

### Performance Document

---

#### Add Item

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☐ Add your own Item
- ☐ Copy item from my Documents
- ☐ Copy Item from My Team's Documents



Next

[Return](#)

This will take you back to your employee's document where you will now see your employee's responsibility displayed.

Click **Save** in the top right corner once you've added an item to your employee's document.

- Repeat this process to **add** additional responsibilities.
- To **edit** the responsibility, select the pencil icon

▼ Responsibility 2: Standard Operating Procedures

Description : Establish Standard Operating Procedures for 5 processes utilized in this office.



Created By Dory Fish, 06/10/2020 9:24AM

- To **delete** the responsibility, select the trash can icon

▼ Responsibility 2: Standard Operating Procedures

Description : Establish Standard Operating Procedures for 5 processes utilized in this office.



Created By Dory Fish, 06/10/2020 9:24AM



## To Copy from Another Document

Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

Select Copy item from my Documents or Copy item from My Team's Documents (whichever is needed) and click **Next**.

### Performance Document

---

#### Add Item

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee's evaluation select the Copy from My Team's Document option.

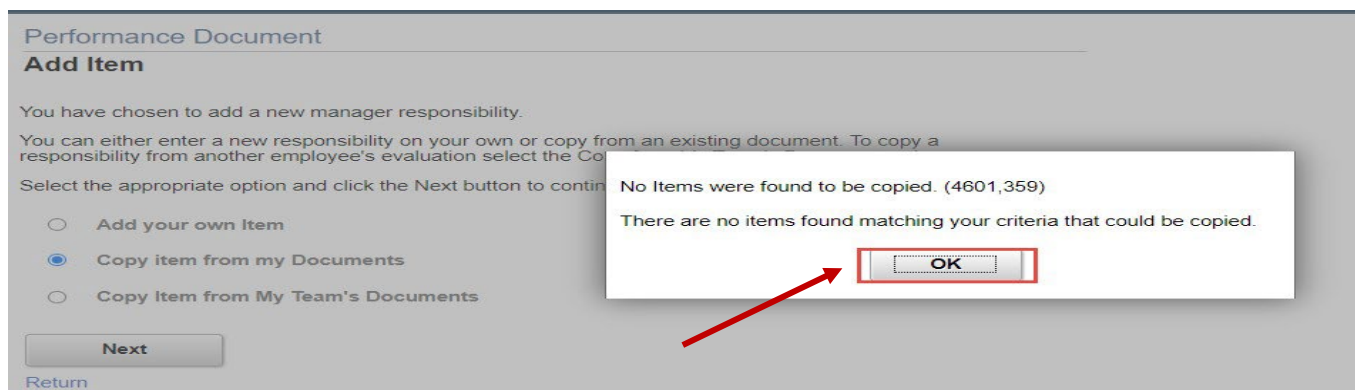
Select the appropriate option and click the Next button to continue.

- ☐ Add your own Item
- ☐ Copy item from my Documents
- ☐ Copy Item from My Team's Documents

**Next**

[Return](#)

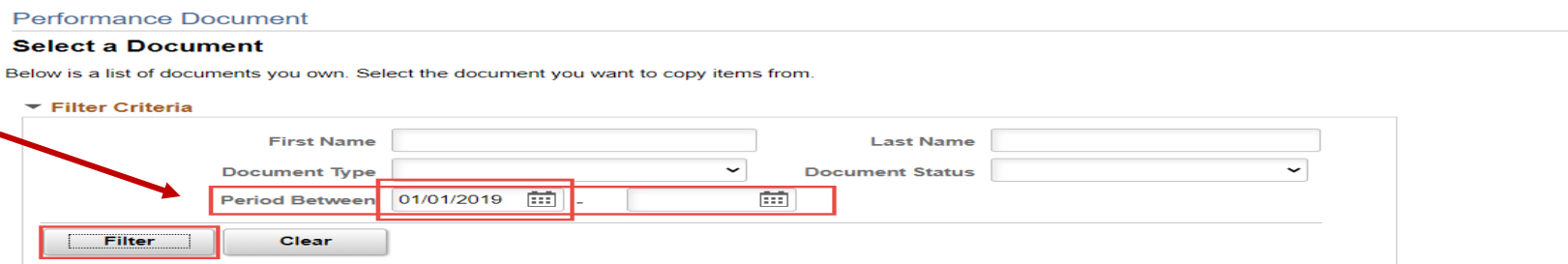
If there are not any items to copy, you will receive a pop-up telling you that there are no items found. Click **OK**.



The screenshot shows the 'Performance Document Add Item' screen. A pop-up message states: 'No Items were found to be copied. (4601,359) There are no items found matching your criteria that could be copied.' An 'OK' button is highlighted with a red box, and a red arrow points to it. In the background, the 'Add Item' screen has three radio buttons: 'Add your own Item', 'Copy item from my Documents' (which is selected), and 'Copy Item from My Team's Documents'. There is a 'Next' button and a 'Return' link at the bottom left.

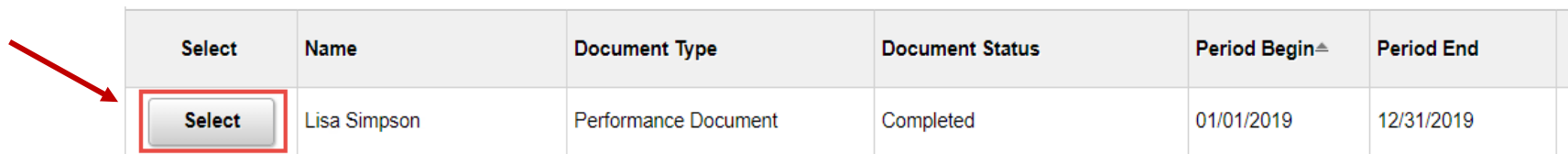
If there are items to copy, you'll be re-directed to a screen that automatically populates the beginning of the current year(Example: 01/01/2020).

- If you've already established items on an employee's document, you can leave this date as is.
- If you need to select items from a prior years document, you'll update this date to 01/01/YYYY and select Filter.



The screenshot shows the 'Performance Document Select a Document' screen. It includes a 'Filter Criteria' section with fields for 'First Name', 'Last Name', 'Document Type', and 'Document Status'. A 'Period Between' field is set to '01/01/2019'. A red arrow points to the 'Filter' button, which is highlighted with a red box. There is also a 'Clear' button.

Click **Select** on the employee's document you want to copy items from.



Select	Name	Document Type	Document Status	Period Begin <sup>▲</sup>	Period End
<b>Select</b>	Lisa Simpson	Performance Document	Completed	01/01/2019	12/31/2019

A red arrow points to the 'Select' button in the first row of the table, which is highlighted with a red box.

Previously established items will automatically populate.

Performance Document

Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Copy from Document

Name	Lisa Simpson	Document Type	PERFORM
Section	Managerial Responsibilities	Content Type	
Begin Date	01/01/2019	End Date	12/31/2019

Managerial Responsibilities to be copied

 		  1-1 of 1 
<input type="checkbox"/>	Responsibilities	
<input type="checkbox"/>	HR & AAO- Duty	
<input type="checkbox"/>	HR & AAO- Duty	

Select All

Deselect All

Copy

Cancel

To view the description of this item select the name hyperlinked in blue.

	Responsibilities	
<input type="checkbox"/>	<a href="#">HR &amp; AAO- Duty</a>	

You'll be re-directed to a description of the item. Once finished viewing the description, select **Return**.

**Item Details**

**Responsibility Section Section**

**HR & AAO- Duty**

**Description :** Analyzes and conducts classification reviews, and prepares recommendations; composes and writes new job descriptions.

**Return**

Select the box to the left of the populated item and click **Copy**.

**Manager Responsibility Section**

Q

1-12 of 12

	Responsibilities
<input checked="" type="checkbox"/>	HR & AAO- Duty

Select All

Deselect All

Copy

Cancel

You'll be re-directed back to your employees current document where the copied item will be displayed.

Performance Document [Return to Current Documents](#) [Save](#) [Approve](#)

**Define Criteria - Update and Approve** [Print](#) [Export](#)

Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Responsibility](#)

► **Responsibility 1: Business Administration - Duty**

▼ **Responsibility 2: Standard Operating Procedures**

Description : Establish Standard Operating Procedures for 5 processes utilized in this office. [Copy](#) [Paste](#) [Edit](#) [Delete](#)

Created By Dory Fish 06/10/2020 9:24AM

▼ **Responsibility 3: HR & AAO- Duty**

Description : Analyzes and conducts classification reviews, and prepares recommendations; composes and writes new job descriptions. [Copy](#) [Delete](#)

Created By Dory Fish 06/10/2020 9:24AM

- To *delete* the responsibility, select the trash can icon

▼ **Responsibility 3: HR & AAO- Duty**

Description : Analyzes and conducts classification reviews, and prepares recommendations; composes and writes new job descriptions. [Copy](#) [Delete](#)

Created By Dory Fish 06/10/2020 9:24AM

Because the prepopulated Responsibilities are automatically generated, there is not an option to edit.

Click **Save** in the top right corner once you've added an item to your employee's document.

The screenshot shows a web interface for a 'Performance Document'. At the top right, there are three buttons: 'Return to Current Documents', 'Save', and 'Approve'. The 'Save' button is highlighted with a red rectangular box, and a red arrow points from the bottom right towards it. Below the buttons, the section is titled 'Define Criteria - Update and Approve'. It contains instructions: '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.' followed by a numbered list of four steps. Below the instructions, there is a 'Long Format' link and three tabs: 'Goals', 'Responsibilities' (which is currently selected and highlighted in green), and 'Competencies'.

**After entering all Responsibilities, please move to the Competencies section.**

## Competencies Section

Select the Competencies Tab where additional sections can be found.

- Section 4 – Competencies: Describes “how” one does a job, as opposed to “what” someone does. The specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role.  
*Standard Competencies can be found [here](#).*
- Section 5 – Customer Service: Describes services to customers.  
*Customer Service Measures can be found [here](#).*



Goals Responsibilities **Competencies**

▼ Section 4 - Competencies

▼ Section 5 - Customer Service

# To Add A Competency

Select **Add Competency**.

---

Goals

Responsibilities

Competencies

## ▼ Section 4 - Competencies

A competency is the specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role. A competency is often described as "how" one does a job, as opposed to "what" someone does, although there may be some overlap.

Employees should have 2-4 competencies listed on the performance evaluation. Click the **Add Competency** button. Managers can select from a list of pre-defined competencies or copy from an existing evaluation.

Competencies will be evaluated by: Employee, Manager



### Performance Document

**Add Competency**

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☐ Add pre-defined competency
- ☐ Copy competency from my Document
- ☐ Copy Competency from My Team's Documents





From here, as the manager, you can select to either add a pre-defined competency, copy competency items from your own document, or copy items from another one of your employee's documents. Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

## Performance Document

---

### Add Competency

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☐ Add pre-defined competency
- ☐ Copy competency from my Document
- ☐ Copy Competency from My Team's Documents



Next

[Return](#)

## To Add a Pre-Defined Competency Item

Select Add pre-defined competency and click **Next**.

### Performance Document

---

#### Add Competency

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☒ Add pre-defined competency
- ☐ Copy competency from my Document
- ☐ Copy Competency from My Team's Documents

**Next**

[Return](#)

You'll be automatically directed to the screen where you can now **add** your own item.

## Performance Document

### Add Competency

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☒ Add pre-defined competency
- ☐ Copy competency from my Document
- ☐ Copy Competency from My Team's Documents

Next

[Return](#)

**Enter** the title and description of the Managerial Responsibility you are establishing. The responsibility set here should be separate from the employees regular responsibilities outlined in the Responsibilities section. Once you've established this item select **Add**.

#### Performance Document

##### Add Your Own Item

\*Title Managerial Responsibility 1

Description

Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate

Add

Return

This will take you back to your employees document where you will now see your employees managerial responsibility displayed.

Make sure you click **Save** in the top right hand corner once you've added an item to your employees document.

- To **add** additional managerial responsibilities repeat this same process

## To Add Pre-Defined Competency

Select Add pre-defined competency and click **Next**.

### Performance Document


---

#### Add Competency

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- 
- ☒ Add pre-defined competency
  - ☐ Copy competency from my Document
  - ☐ Copy Competency from My Team's Documents

**Next**

[Return](#)

You can search for a pre-defined competency by 1 of 2 ways;

- Enter the Competency name from the [list](#)
- Manually search for Competencies using the drop-down arrows in the Content Group Type OR Content Group sections.

---

## Performance Document

### Add a Pre-Defined Competency

To search for Competencies to add to the document, select the Content Group Type and click the Search button. To narrow the results further, select a Content Group.

#### Search Criteria

Competency

Content Group Type

Content Group

Search

Clear

[Return](#)

Based on the Standard Competency list, enter the Competency Item name in the Competency section and click **Search**. The Competency will populate at the bottom, **check the box to the left of the Competency**, click **Add**.

Standard Division/Department Competency Selections	
Competency Item	Competency Description
Adaptability	Maintaining effectiveness when experiencing major changes in work responsibilities or environment; adjusting effectively to work within new work structures, processes, requirements, or cultures.
Aligning Perform for Success	Focusing and guiding others in accomplishing work objectives.

#### Search Criteria

Competency

Adaptability

Content Group Type



Content Group



Search

Clear

#### Search Results



1-2 of 2

Competencies



Adaptability

Select All

Deselect All

Add



Return



To manually search for Competencies using the drop down arrows in the Content Group Type OR Content Group sections;

- Select the drop-down arrow next to the blank box in **Content Group Type** and select Competency Types.
- Select the drop-down arrow next to the blank box in **Content Group**. A list of different content groups will populate, select the one that best applies to your employees position.



**Search Criteria**

Competency

Content Group Type   

Content Group   

**Search Results**

 1-2 of 2 

	Competencies
<input type="checkbox"/>	Adaptability
<input type="checkbox"/>	Adaptability

[Select All](#) [Deselect All](#)

Athletics  
Clerical  
DSAES  
Director  
Executive  
Lead  
Manager  
Professional  
Public Safety  
Public Safety Manager  
Research  
Succession Planning  
Supervisor  
Trades



The Competency will populate at the bottom, **check the box to the left of the Competency** and click **Add**.

Search Criteria

Competency

Content Group Type Competency Types ▼

Content Group Professional ▼

Search

Clear

Search Results

1-2 of 2 ▼

	Competencies	
<input checked="" type="checkbox"/>	Adaptability	

Select All

Deselect All

Add

Return

Once added, you'll be re-directed back to your document where the Competency will now be added. Don't forget to click **Save** in the top Right corner of your document.

[Return to Current Documents](#) **Save** **Approve**

Performance Document

**Define Criteria - Update and Approve**

Goals

Responsibilities

Competencies

[Print](#) | [Export](#)

▼ **Section 4 - Competencies**

A competency is the specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role. A competency is often described as "how" one does a job, as opposed to "what" someone does, although there may be some overlap.

Employees should have 2-4 competencies listed on the performance evaluation. Click the **Add Competency** button. Managers can select from a list of pre-defined competencies or copy from an existing evaluation.

Competencies will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Competency](#)

▼ **Competency 1: Adaptability**

Description : Maintaining effectiveness when experiencing major changes in work responsibilities or environment; adjusting effectively to work within new work structures, processes, requirements, or cultures.

Created By Dory Fish 06/10/2020 9:24AM

## Customer Service Section

Select the Competencies Tab where additional sections can be found.

- Section 4 – **Competencies**: Describes “how” one does a job, as opposed to “what” someone does. The specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role.  
*Standard Competencies can be found [here](#).*
- Section 5 – **Customer Service**: Describes services to customers.  
*Customer Service Measures can be found [here](#).*



# To Add A Customer Service Measure

## Select Add Item.

Goals	Responsibilities	Competencies
-------	------------------	--------------

### Section 4 - Competencies

#### Section 5 - Customer Service

Customer Service is the commitment to providing value added services to customers, including attitude, knowledge, technical support and quality of service in a timely manner.

Employees should have 2-4 Customer service measures listed on the performance evaluation. Click the **Add Item** button. Managers can select from a list of pre-defined items or copy from an existing evaluation.

Customer Service will be evaluated by: Employee, Manager

 **Add Item**



### Performance Document

#### Add Item

You have chosen to add a new customer service item.

You may select an item already defined in the system or copy from an existing document. To copy an item from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☒ Add pre-defined item
- ☐ Copy item from my Documents
- ☐ Copy Item from My Team's Documents

**Next**

[Return](#)

From here, as the manager, you can select to either add a pre-defined customer service item, copy customer service items from your own document or copy items from another one of your employee's documents. Please note that in order to copy items from another evaluation (yours or another employee), the customer service items must have already been set. Click **Next**.

## Performance Document

---

### Add Item

You have chosen to add a new customer service item.

You may select an item already defined in the system or copy from an existing document. To copy an item from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☒ Add pre-defined item
- ☐ Copy item from my Documents
- ☐ Copy Item from My Team's Documents

Next

[Return](#)

## Add a Pre-Defined Customer Service (CS) Measure

Select Add pre-defined item and click **Next**.

### Performance Document

---

#### Add Item

You have chosen to add a new customer service item.

You may select an item already defined in the system or copy from an existing document. To copy an item from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- ☒ Add pre-defined item
- ☐ Copy item from my Documents
- ☐ Copy Item from My Team's Documents

**Next**

[Return](#)

You can search for a pre-defined CS Measure by 1 of 2 ways;

- Enter the CS Measure name from the [list](#)
- Click **Search** and a list of the CS Measures will populate.

## Performance Document

### Add a Pre-Defined Item

To search for Customer Service items to add to the document, click the **Search** button. Leave the Title field blank to view all Customer Service items.

#### Search Criteria

Title

**Search**

**Clear**

[Return](#)

Based on the Customer Service Measures list, enter the CS Measure name in the Title section and click Search. The CS Measure will populate at the bottom, **check the box to the left of the item and click Add.**

Standard Division/Department		
Customer Service Measures		
Customer Service Measure		Customer Service Measure Description
CUST01	Responsiveness	Responsiveness - the ability to build and maintain customer satisfaction through providing timely responses to inquiries, assignments and other deliverables.
CUST02	Availability	Availability – the individual person is accessible and open to assist whenever when needed.

Search Criteria

Title Responsiveness

Search

Clear

Search Results

		1-1 of 1
	Customer Service	
<input checked="" type="checkbox"/>	Responsiveness	

Select All

Deselect All

Add



To view the full list of CS Measures, click **Search**.

- The full CS Measures list will automatically populate below the Search.
- From the list of CS Measures, select the one(s) you would like to apply to your employees document. Click **Add**.

#### Performance Document

#### Add a Pre-Defined Item

To search for Customer Service items to add to the document, click the **Search** button. Leave the Title field blank to view all Customer Service items.

#### Search Criteria

Title

**Search**

Clear

#### Search Results

		1-6 of 6
Customer Service		
<input checked="" type="checkbox"/>	Responsiveness	
<input type="checkbox"/>	Availability	
<input type="checkbox"/>	Quality of Work	
<input type="checkbox"/>	Knowledge of Work	
<input type="checkbox"/>	Courtesy and Professionalism	
<input checked="" type="checkbox"/>	Proactive in providing solutions	

Select All

Deselect All

**Add**

Once added, you'll be re-directed back to your document where the CS Measure will now be added. Don't forget to click **Save** in the top right corner of your document.

Performance Document

Return to Current Documents **Save** Approve

Define Criteria - Update and Approve [Print](#) | [Export](#)

▼ Section 5 - Customer Service

Customer Service is the commitment to providing value added services to customers, including attitude, knowledge, technical support and quality of service in a timely manner.

Employees should have 2-4 Customer service measures listed on the performance evaluation. Click the **Add Item** button. Managers can select from a list of pre-defined items or copy from an existing evaluation.

Customer Service will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Item](#)

▼ **Responsiveness**

**Description :** Responsiveness - the ability to build and maintain customer satisfaction through providing timely responses to inquiries, assignments and other deliverables. [Edit](#) [Delete](#)

---

Created By Dory Fish 06/15/2020 10:06AM

▼ **Proactive in providing solutions**

**Description :** Proactive in providing solutions - the individual displays result and action oriented behavior to identify and capitalized on opportunities to provide commendable solutions in a timely manner. [Edit](#) [Delete](#)

---

Created By Dory Fish 06/15/2020 10:06AM

## To Copy from another Document

Please note that in order to copy items from another evaluation (yours or another employee), the CS Measures must have already been set.

Select **Copy item from my Documents** OR **Copy item from My Team's Documents** (whichever one you're wanting to copyfrom) and click **Next**.

### Performance Document

---

#### Add Item

You have chosen to add a new customer service item.

You may select an item already defined in the system or copy from an existing document. To copy an item from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

☐ Add pre-defined item

☒ Copy item from my Documents

☒ Copy Item from My Team's Documents

Next

If you try copying items from a document that doesn't already have items established you'll receive a pop-up notification when you select **Next**. Click **OK** on the pop-up and try to copy from a document the other way.

*(Example: No items were found when trying to copy from "My Documents", try copying items from "My Teams Documents" instead).*

The screenshot shows a web interface for adding a new customer service item. The main form has a title 'Performance Document' and a sub-header 'Add Item'. It contains instructions and three radio button options: 'Add pre-defined item', 'Copy item from my Documents' (which is selected), and 'Copy Item from My Team's Documents'. At the bottom of the form are 'Next' and 'Return' buttons. A red arrow points to the 'Next' button. A white pop-up box with a red border is overlaid on the right side of the form. It contains the text 'No Items were found to be copied. (4601,359)' and 'There are no items found matching your criteria that could be copied.' Below this text is an 'OK' button, which is also highlighted with a red rectangle. A red arrow points from the bottom right of the pop-up box towards the bottom right of the page.

Performance Document

**Add Item**

You have chosen to add a new customer service item.

You may select an item already defined in the system or copy from an existing document. To copy an item from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

☐ Add pre-defined item

☒ Copy item from my Documents

☐ Copy Item from My Team's Documents

Next

Return

No Items were found to be copied. (4601,359)

There are no items found matching your criteria that could be copied.

OK

If there are items already set that can be copied, you'll be re-directed to a screen that automatically populates the beginning of the current year (Example: 01/01/2022).

- If you've already established items on an employees document, you can leave this date as is.

Performance Document

Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

▼ Filter Criteria

First Name

Last Name

Document Type

Document Status

Period Between

01/01/2020

-

Filter

Clear

Performance Documents

<div><div></div><div></div></div>		<div><div>1-3 of 3</div><div></div><div></div></div>			
Select	Name	Document Type	Document Status	Period Begin▲	Period End



If you need to select items from a prior years document, you'll update this date to 01/01/YYYY and select **Filter**.

## Performance Document







### Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

#### ▼ Filter Criteria

First Name	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text" value="▼"/>	Document Status	<input type="text" value="▼"/>
Period Between	<input type="text" value="01/01/2019"/> 	-	<input type="text"/> 
<input type="button" value="Filter"/>		<input type="button" value="Clear"/>	

#### Performance Documents

 		  1-6 of 6  			
Select	Name	Document Type	Document Status	Period Begin▲	Period End
<input type="button" value="Select"/>	Lisa Simpson	Performance Document	Completed	01/01/2019	12/31/2019

Click **Select** on the employees document you want to copy items from.

Select	Name	Document Type	Document Status	Period Begin▲	Period End	
<div>Select</div>	Lisa Simpson	Performance Document	Completed	01/01/2019	12/31/2019	

Previously established items will automatically populate.

Performance Document

Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Copy from Document

Name	Lisa Simpson	Document Type	PERFORM
Section	Customer Service	Content Type	CUSTSVC
Begin Date	01/01/2019	End Date	12/31/2019

Customer Service to be copied

<div><div></div><div>Q</div></div>		<div>1-2 of 2</div>	<div></div>
	Customer Service		
<input type="checkbox"/>	Quality of Work		
<input type="checkbox"/>	Courtesy and Professionalism		

Select All      Deselect All

Copy

Cancel

To view the description of an item, select the name hyperlinked in **blue**.

	Customer Service
<input type="checkbox"/>	<a href="#">Quality of Work</a>

You'll be re-directed to a description of the item. Once finished viewing the description, select **Return**.

### Item Details

#### Customer Service Section

##### Quality of Work

Description : Quality of Work - the deliverable(s) that are produced are of quality and thoroughly worked on to reach a final product or solution.

[Return](#)

Select **the box to the left** of the populated item and click **Copy**.

Customer Service to be copied

	Customer Service
	<a href="#">Quality of Work</a>
<input type="checkbox"/>	<a href="#">Courtesy and Professionalism</a>

Select All Deselect All

[Copy](#) [Cancel](#)



You'll be re-directed back to your employees current document where the copied item will now be available.

Performance Document Return to Current Documents Save Approve

**Define Criteria - Update and Approve** Print Export

▼ Section 5 - Customer Service

Customer Service is the commitment to providing value added services to customers, including attitude, knowledge, technical support and quality of service in a timely manner.

Employees should have 2-4 Customer service measures listed on the performance evaluation. Click the **Add Item** button. Managers can select from a list of pre-defined items or copy from an existing evaluation.

Customer Service will be evaluated by: Employee, Manager

Expand | Collapse | Add Item

► Responsiveness

► Proactive in providing solutions

▼ Quality of Work

Description : Quality of Work - the deliverable(s) that are produced are of quality and thoroughly worked on to reach a final product or solution. 📄 🗑️

Created By	Dory Fish	06/15/2020 10:33AM
Last Modified By	Dory Fish	01/30/2020 9:19AM

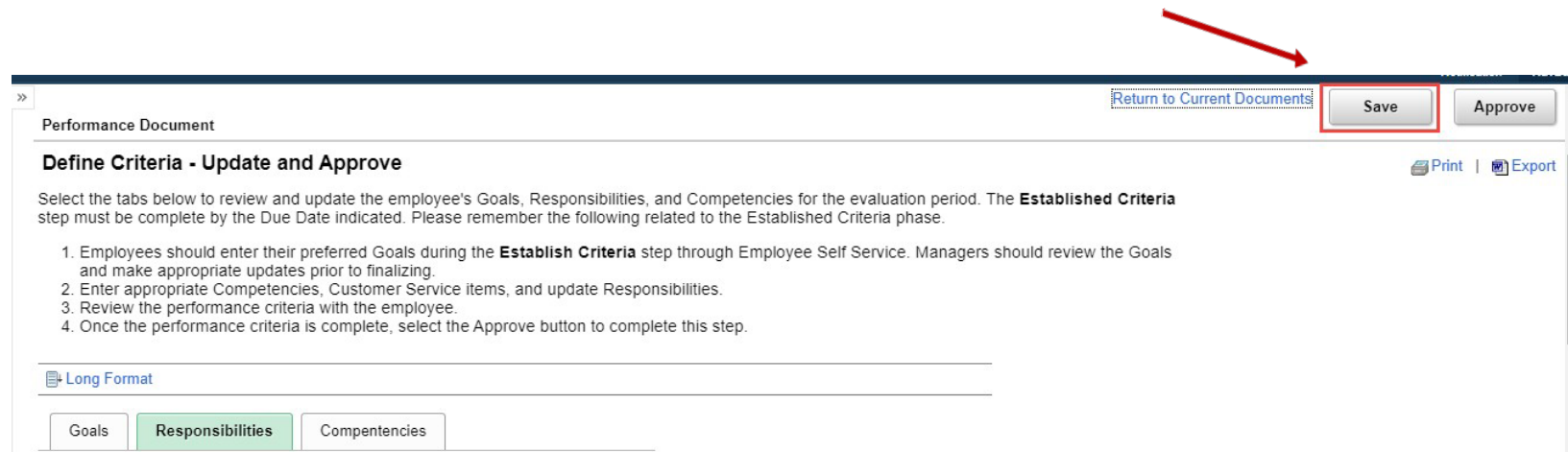
- To **delete** the responsibility, select the **trash can icon**.

▼ Quality of Work

Description : Quality of Work - the deliverable(s) that are produced are of quality and thoroughly worked on to reach a final product or solution. 📄 🗑️

- Because the items pulled in are automatically generated from the pre-populated Responsibilities, there is no option to edit.

Make sure you click **Save** in the top right hand corner once you've added an item to your employee's document.



The screenshot shows a web application interface for a "Performance Document". At the top right, there is a navigation bar with three buttons: "Return to Current Documents" (a link), "Save" (highlighted with a red box and a red arrow pointing to it from above), and "Approve". Below the navigation bar, the main content area is titled "Performance Document" and "Define Criteria - Update and Approve". It contains instructions for selecting tabs to review and update employee goals, responsibilities, and competencies. A list of four steps is provided: 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. Below the instructions, there is a "Long Format" link and a tabbed interface with three tabs: "Goals", "Responsibilities" (which is currently selected and highlighted in green), and "Competencies".

## **FINALIZE CRITERIA**

Now that you've set criteria for your employee you're ready to finalize it. Before finalizing, go through each section to ensure that you have set an item for everything.

**This is imperative as you'll have to assign ratings to each of these sections. If there is nothing established in one of the sections, there is nothing to evaluate your employee on and therefore nothing to rate. In order to finalize the evaluation and close it out you MUST rate every section in the document.**

Each section of the document has Section Summaries that include a Section Weight Percentage. These percentages are what determine the overall ePerformance rating for your employee. Each section has a minimum weight that must be assigned, but you as the Manager can determine how much value a section should have. (Example: You want Responsibilities to hold more value than the employee's Goals).

- **Minimum Section Weights (section screen shots included on pages directly following step by step instructions)**
  - Goals – 10%
  - Managerial Responsibilities – 10% (N/A for employees in Non-Manager roles)
  - Responsibilities – 40%
  - Competencies – 10%
  - Customer Service – 10%

The total overall weight for the document MUST equal 100%. The minimum section weights only account for 70% - 80% (depending on if the document has the additional Managerial Responsibilities section), so as the Manager you will have to assign an additional 20% - 30% weight to the sections. You can assign the entire percentage to one section or you can split it up over as many sections as you want. **The system will NOT let you finalize the criteria until the overall weight equals 100%.**

## CHANGING SECTION WEIGHTS

Under **Goals Tab**, scroll down to the Goals Summary Section and update the **Section Weight** to the percentage you want (can't be less than 10%).

The screenshot shows a web interface with three tabs: 'Goals', 'Responsibilities', and 'Competencies'. The 'Goals' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Section 1 - Employee Goals'. Underneath this, there is a 'Goals Section Summary' box. Inside this box, the 'Section Weight' is set to '10' in a text input field, followed by a '%' sign and the text '(not less than 10%)'. A red arrow points from the 'Goals' tab to the 'Goals Section Summary' box, and another red arrow points from the '10' in the 'Section Weight' input field to the text '(not less than 10%)'.

Under **Responsibilities Tab**, scroll down to the Managerial Responsibilities Summary Section and update the **Section Weight** to the percentage you want (can't be less than 10%). If this section isn't on the document, skip to the Responsibilities section.

The screenshot shows a web interface with three tabs: 'Goals', 'Responsibilities', and 'Competencies'. The 'Responsibilities' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Section 2 - Managerial Responsibilities'. Underneath this, there is a 'Managerial Responsibilities Summary' box. Inside this box, the 'Section Weight' is set to '10' in a text input field, followed by a '%' sign and the text '(not less than 10%)'. A red arrow points from the 'Responsibilities' tab to the 'Managerial Responsibilities Summary' box.

Under **Responsibilities Tab**, scroll down to the Responsibilities Summary Section and update the **Section Weight** to the percentage you want (can't be less than 40%).

▼ Section 3 - Responsibilities

▼ Responsibility Section Summary

Section Weight  % (not less than 40%)

Under the **Competencies Tab**, scroll down to the Competencies Summary Section and update the Section Weight to the percentage you want (can't be less than 10%). *(The section weight was changed to 20%)*

Goals

Responsibilities

Competencies

▼ Section 4 - Competencies

▼ Competency Section Summary

Section Weight  % (not less than 10%)

Under the **Competencies Tab**, scroll down to the Customer Service Section and update the Section Weight to the percentage you want (can't be less than 10%). *(The section weight was changed to 20%)*

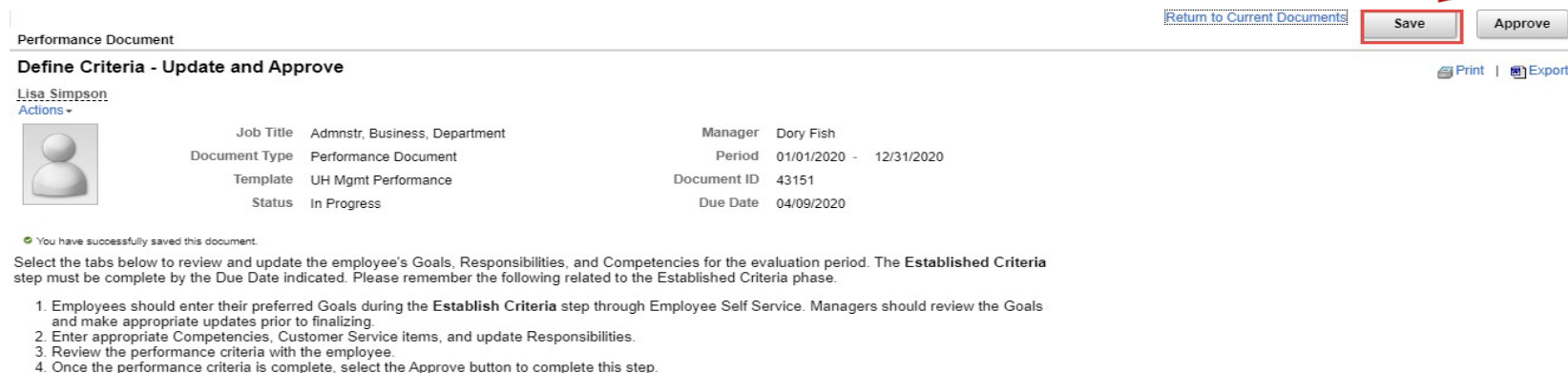
▼ Section 5 - Customer Service

▼ Customer Service Summary

Section Weight  % (not less than 10%)

Once you've updated all section weights, you're ready to finalize your criteria. Before finalizing, take one final look at your employees document to ensure there are no additional changes you want to make.

To finalize the criteria, select **Save** on the top right hand of the document.




Performance Document

[Return to Current Documents](#) **Save** **Approve**

Define Criteria - Update and Approve

[Lisa Simpson](#)  
Actions



Job Title	Admnstr, Business, Department	Manager	Dory Fish
Document Type	Performance Document	Period	01/01/2020 - 12/31/2020
Template	UH Mgmt Performance	Document ID	43151
Status	In Progress	Due Date	04/09/2020

✔ You have successfully saved this document.

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.

Once you've selected **Save**, select **Approve**. If all of your section weights don't total up to 100%, you'll receive an error message indicating there was a problem completing your request. The error message also includes how much % needs to be adjusted.



Performance Document

[Return to Current Documents](#) **Save** **Approve**

Define Criteria - Update and Approve

[Lisa Simpson](#)  
Actions



Job Title	Admnstr, Business, Department	Manager	Dory Fish
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⚠ Problem(s) completing your request:

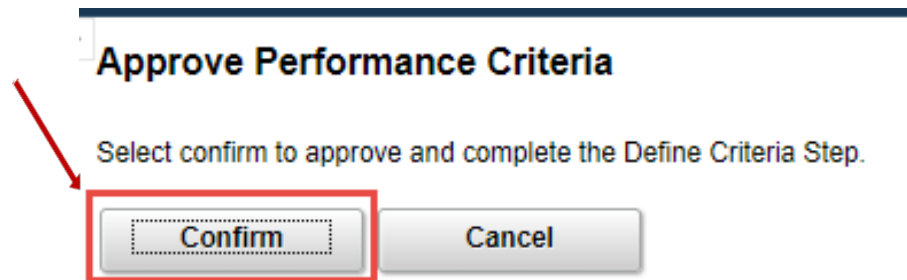
- Please adjust the section weighting by 10%, so that the total section weight adds up to 100%.

[Long Format](#)

**Goals** Responsibilities Competencies

Once you've selected **Save**, select **Approve**. If all of your section weights total up to 100% you'll be re-directed to a confirm request page to confirm you want to approve your established criteria.

Select **Confirm**.



Once confirmed, you'll be redirected to a confirmation page that you've successfully finalized your employee's criteria. Select **Return Current Documents** to return back to your employee ePerformance queue.



✔ You have successfully approved and completed the Define Criteria Step.



## Section Weight Screen Shots

### GOALS SECTION -- Minimum 10% *(Section Weight kept at 10%)*

Performance Document

#### Define Criteria - Update and Approve

 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

 Expand |  Collapse |  Add Goal

► Goal 1: Add your Goal Title here (Example: ePerformance Process)

#### ▼ Goals Section Summary

Section Weight  % (not less than 10%)

## Section Weight Screen Shots

### RESPONSIBILITIES SECTIONS:

- **Managerial Responsibilities – Minimum 10%** *(Section Weight kept at 10%)*

Goals **Responsibilities** Competencies

Section 2 **Managerial Responsibilities**

A manager responsibility is a task, action, or obligation that is a part of a management position or assignment. This section should contain leadership and managerial responsibilities such as sets objectives, organizes, motivates and communicates, measures, and develops employees.

Enter 2-4 manager responsibilities for the performance period. Click the **Add Item** button. Managers can create a new responsibility, or copy responsibilities from an existing evaluation.

Managerial Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Item](#)

► **Managerial Responsibility 1**

▼ **Managerial Responsibilities Summary**

Section Weight  % (not less than 10%)

- **Responsibilities – Minimum 40%** *(Section Weight kept at 40%)*

Section 3 **Responsibilities**

A responsibility is a task, action, or obligation that is part of your specific position or assignment and most often has a frequency and quality associated with it. This section of the evaluation comes directly from the job description. If the job duties in this section have changed, or are not specific enough, managers should edit by adding and deleting criteria to fit the employee's actual job duties. Ideally employees should be evaluated on 4-6 responsibilities.

Responsibilities will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Responsibility](#)

► **Responsibility 1: Business Administration- Duty**

► **Responsibility 2: Admnstr, Business, Department- Summary**

▼ **Responsibility Section Summary**

Section Weight  % (not less than 40%)

## COMPETENCIES SECTIONS:

- **Competencies – Minimum 10%** (*Section Weight changed to 20%*)

Goals

Responsibilities

Competencies

▼ Section 4 - Competencies

A competency is the specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role. A competency is often described as "how" one does a job, as opposed to "what" someone does, although there may be some overlap.

Employees should have 2-4 competencies listed on the performance evaluation. Click the **Add Competency** button. Managers can select from a list of pre-defined competencies or copy from an existing evaluation.

Competencies will be evaluated by: Employee, Manager

Expand | Collapse | Add Competency

► Competency 1: Adaptability

▼ Competency Section Summary

Section Weight 20 % (not less than 10%)

- **Customer Service Measures – Minimum 10%** (*Section Weight changed to 20%*)

▼ Section 5 - Customer Service

Customer Service is the commitment to providing value added services to customers, including attitude, knowledge, technical support and quality of service in a timely manner.

Employees should have 2-4 Customer service measures listed on the performance evaluation. Click the **Add Item** button. Managers can select from a list of pre-defined items or copy from an existing evaluation.

Customer Service will be evaluated by: Employee, Manager

Expand | Collapse | Add Item

► Responsiveness

► Quality of Work

▼ Customer Service Summary

Section Weight 20 % (not less than 10%)