UNIVERSITY of HOUSTON

HUMAN RESOURCES

2022 Performance Evaluation

MANAGER PROCESS GUIDE

UH Human Resources - Compensation

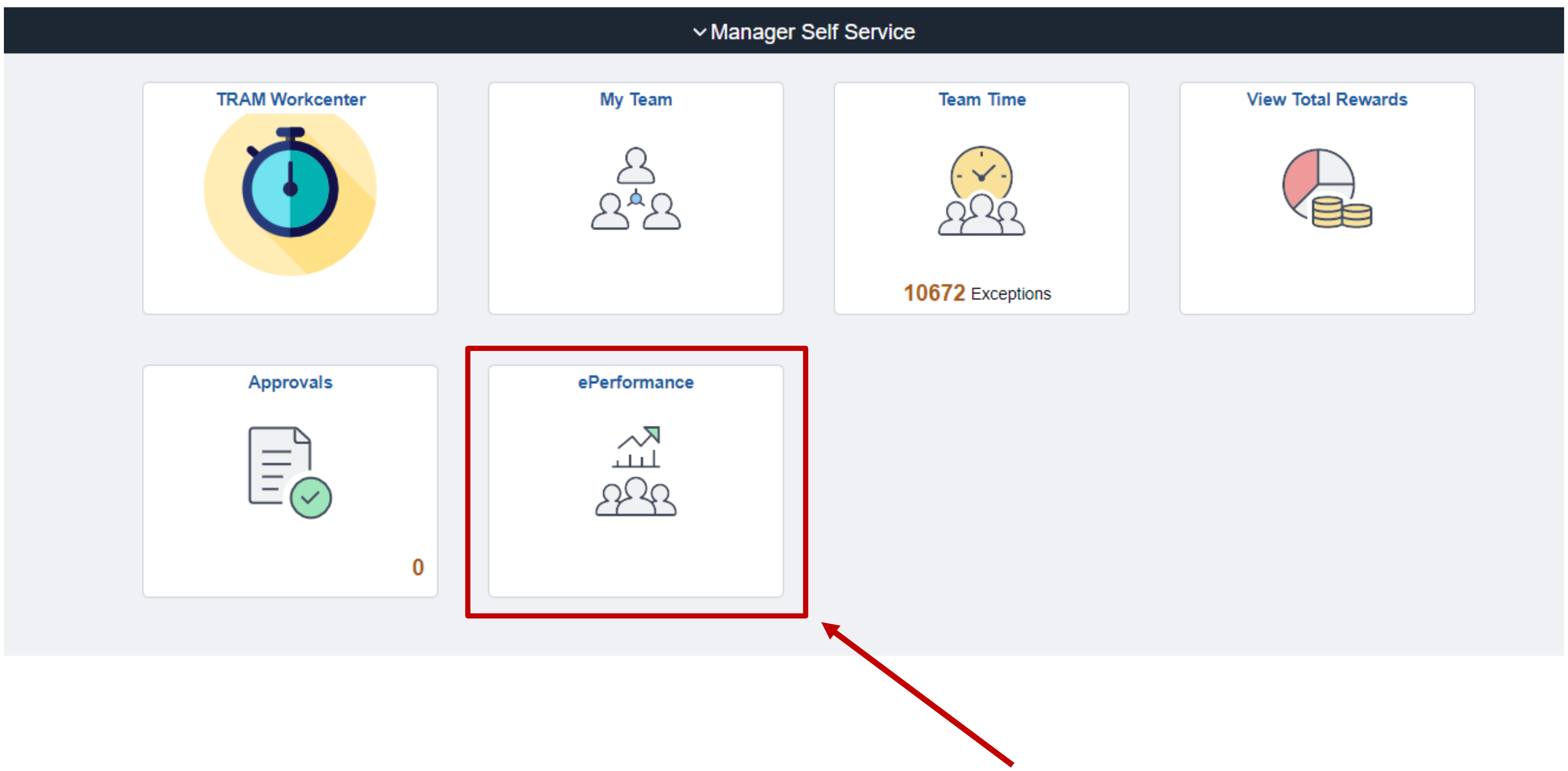
TABLE OF CONTENTS

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

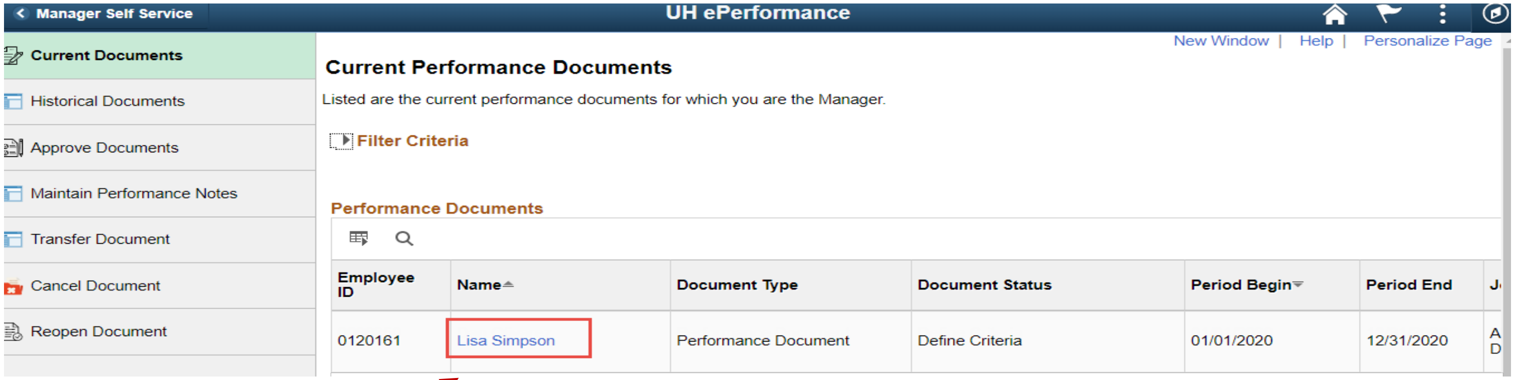
STEP 1:

Establishing Criteria

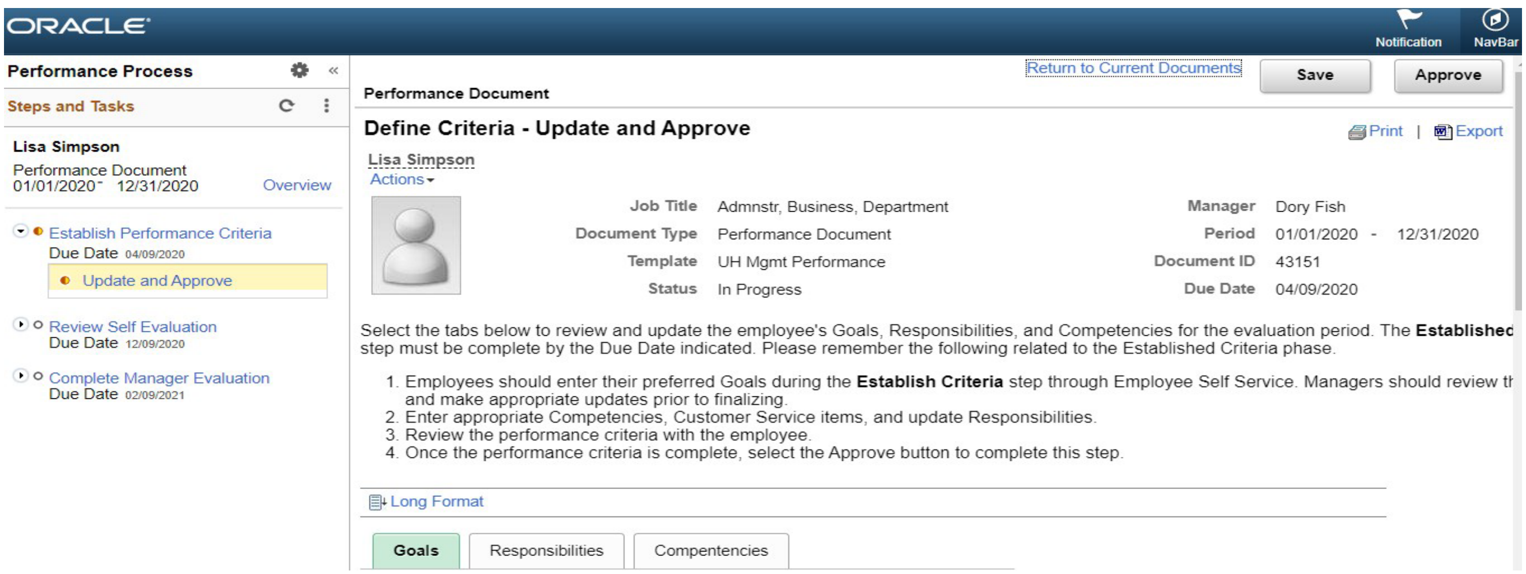
From the PeopleSoft Home Screen select the ePerformance icon.



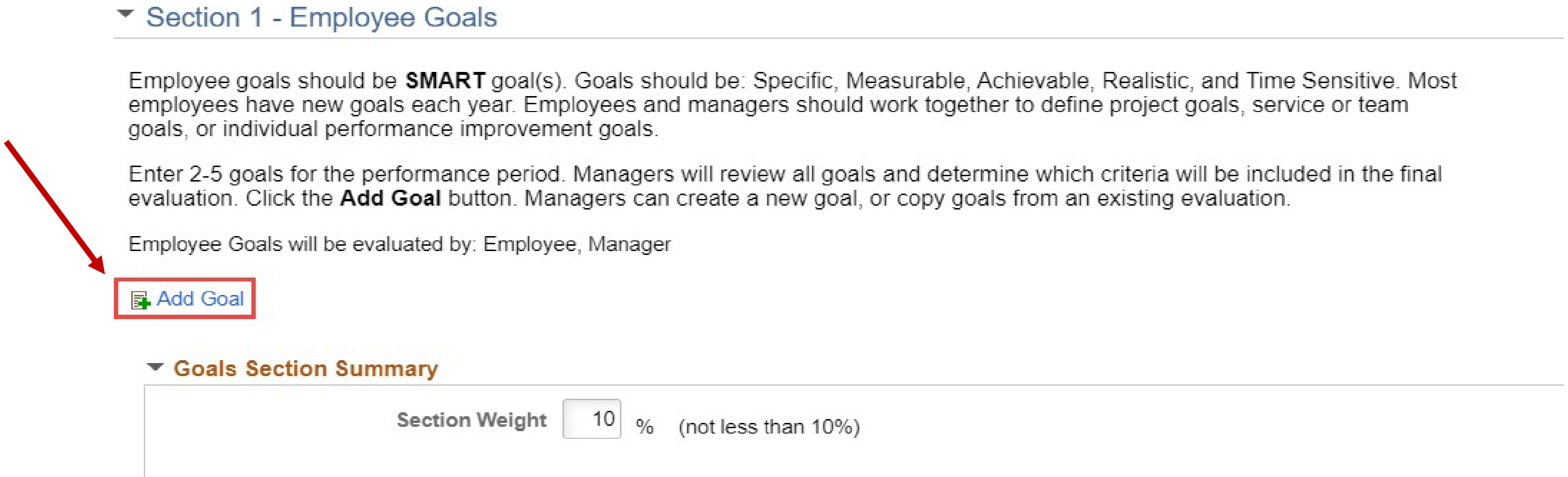
The screen will display a list of your current employees' performance documents.



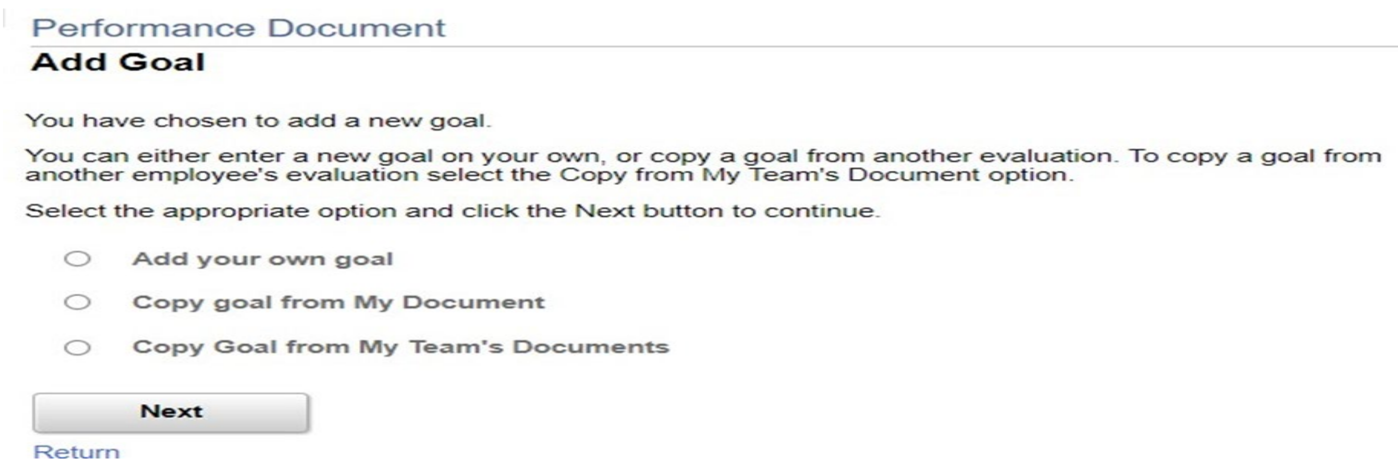
Click on the employees name and their document will open up to begin establishing criteria.



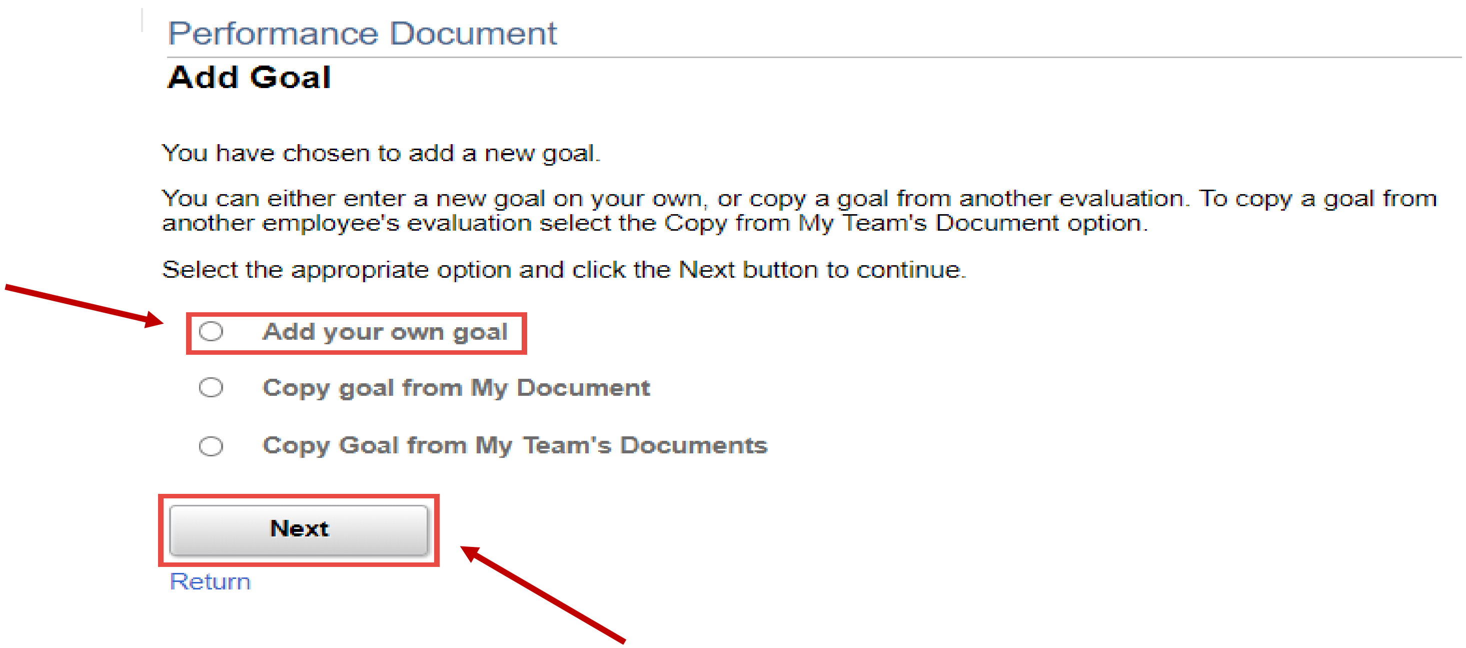
Select Add Goal



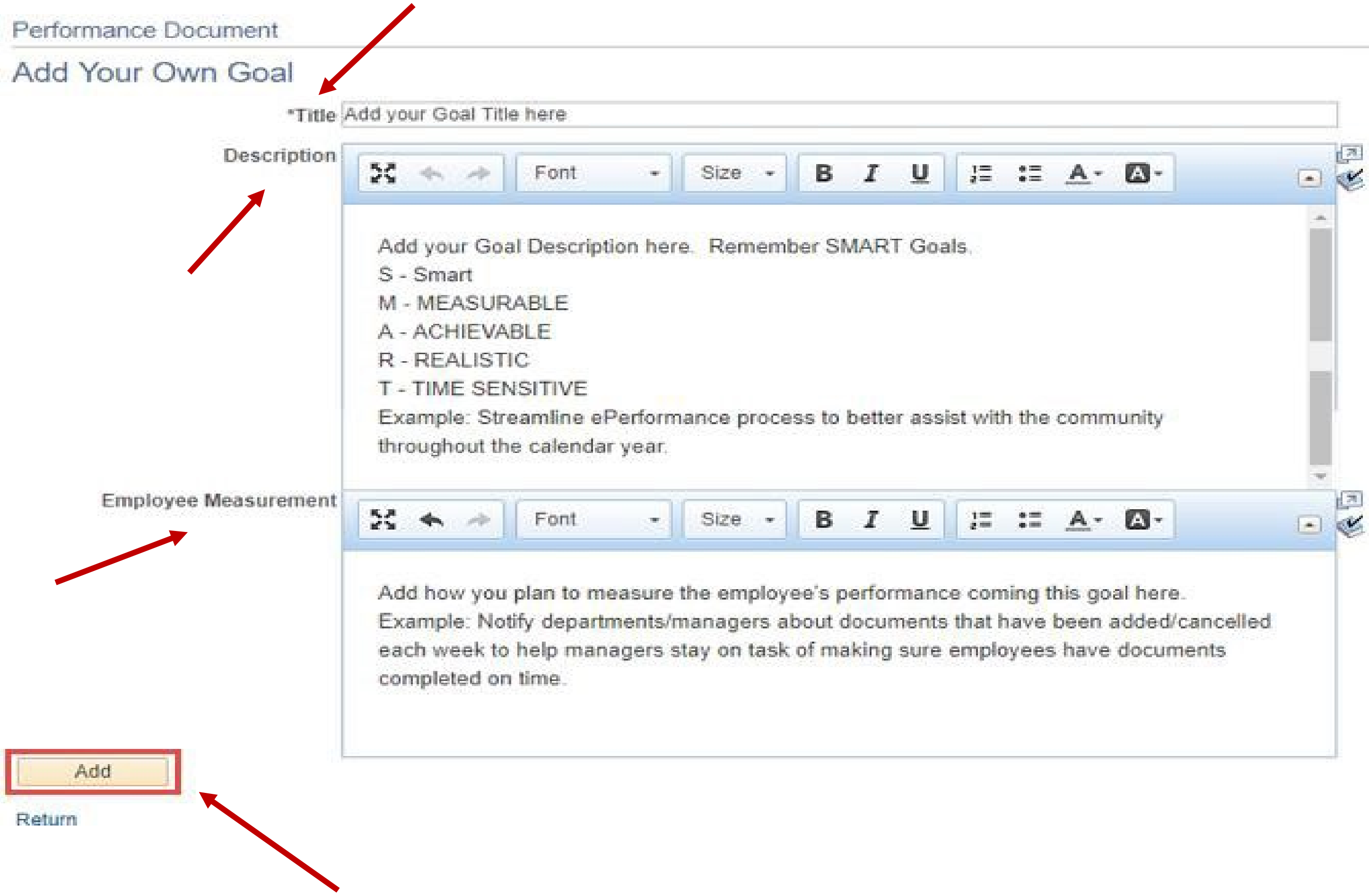
As the manager, you can select to either Add your Own Goal, Copy a Goal from your own Document, or Copy a goal from My Team's Documents. Goals must be created in another evaluation prior to using the copy functions.



Select Add your own goal and click Next



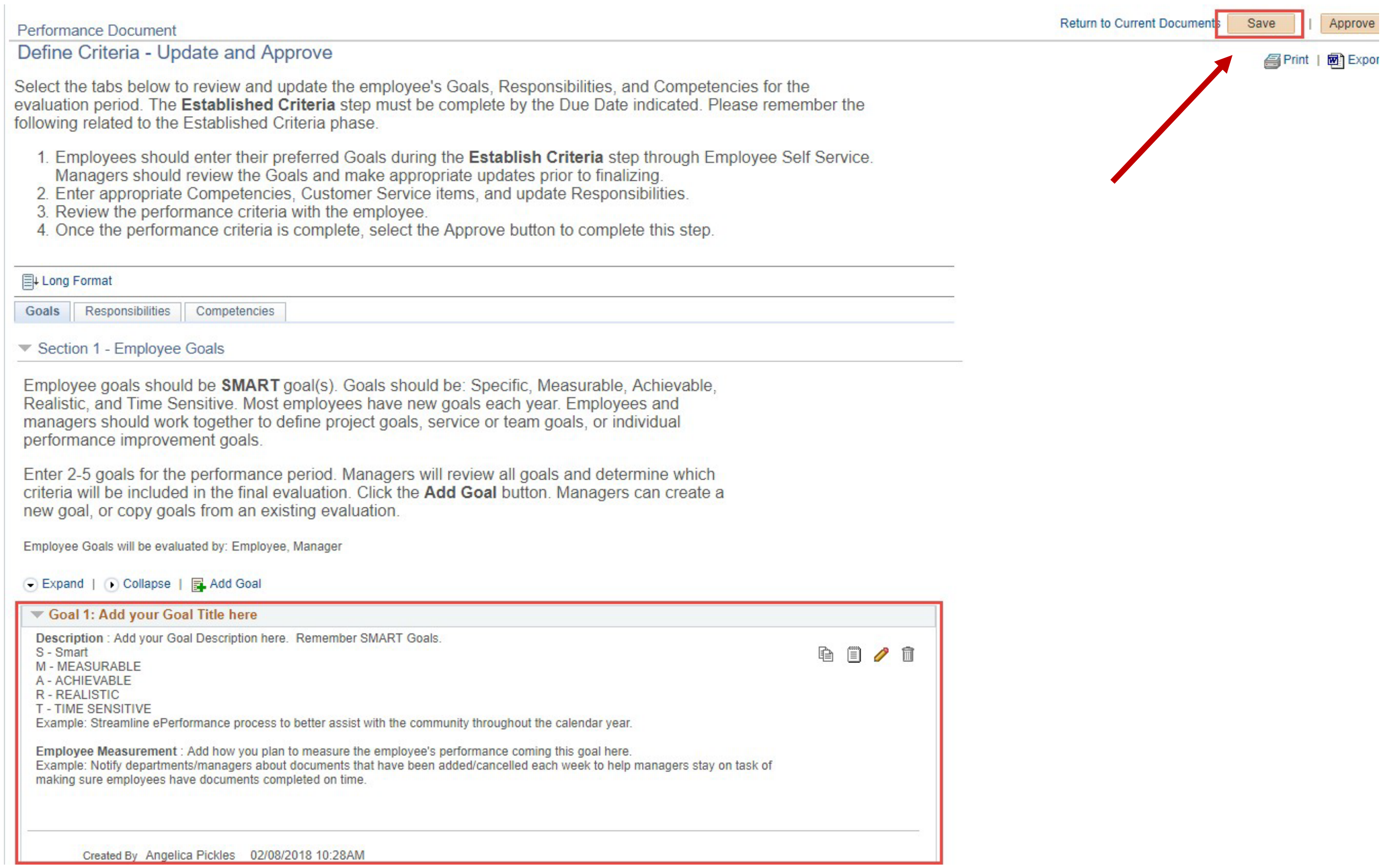
Here you will add your employee's goal by entering the Title, Description and Employee Measurement.



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



To add additional goals repeat this same process.

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

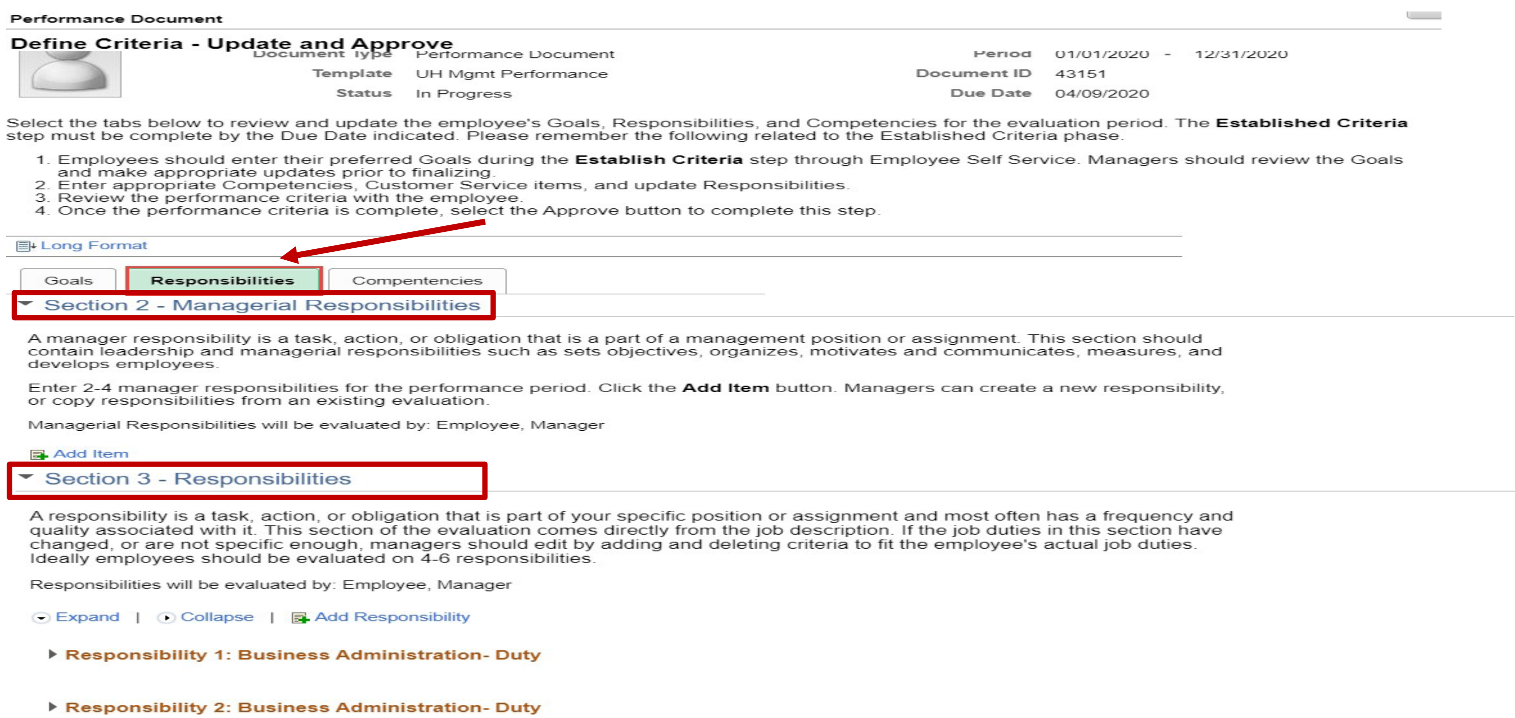
STEP 2a:

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.

> **<u>Section 2</u>** – <u>Managerial Responsibilities</u>: If your employee is a manager or has management responsibilities, they willhave an additional section called Managerial Responsibilities.
> **<u>Section 3</u>** – <u>Responsibilities</u>: A list of your employee's current job duties pulled directly from their job description.



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.

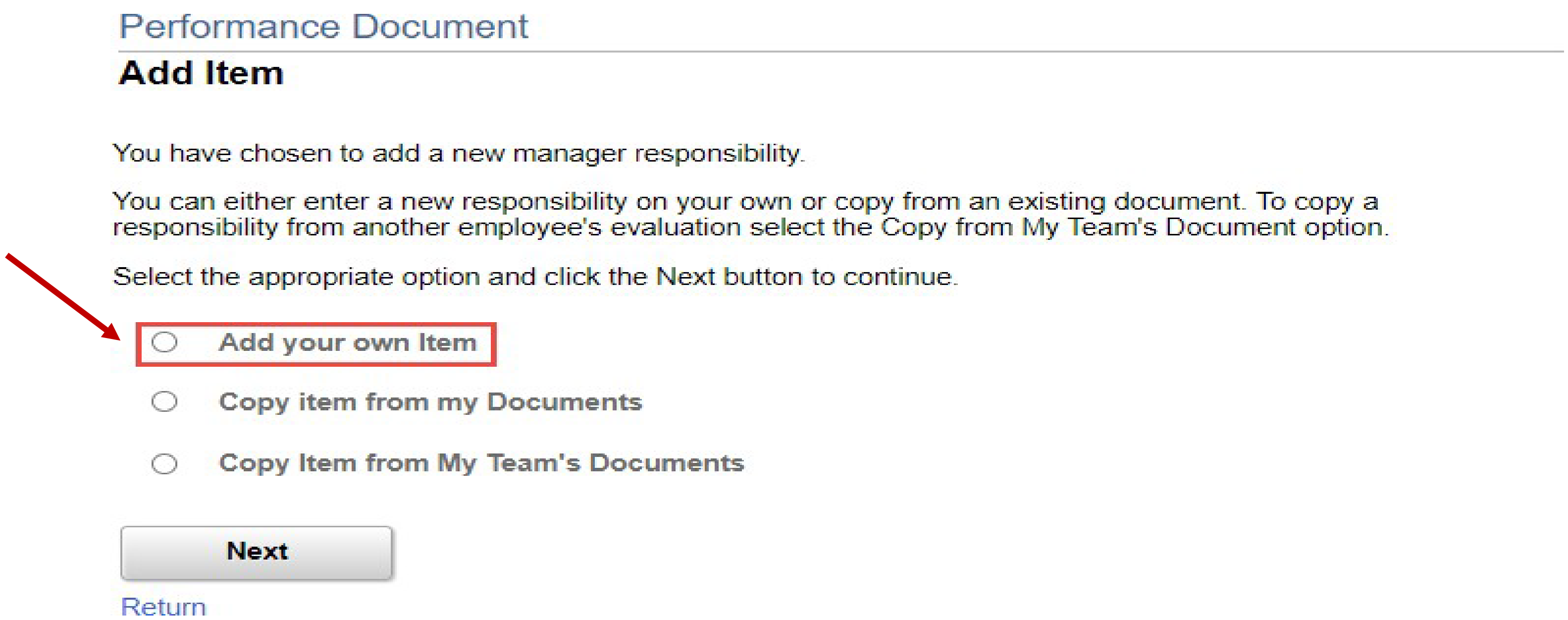
- Add your own Item
- Copy item from my Documents
- Copy Item from My Team's Documents

Next

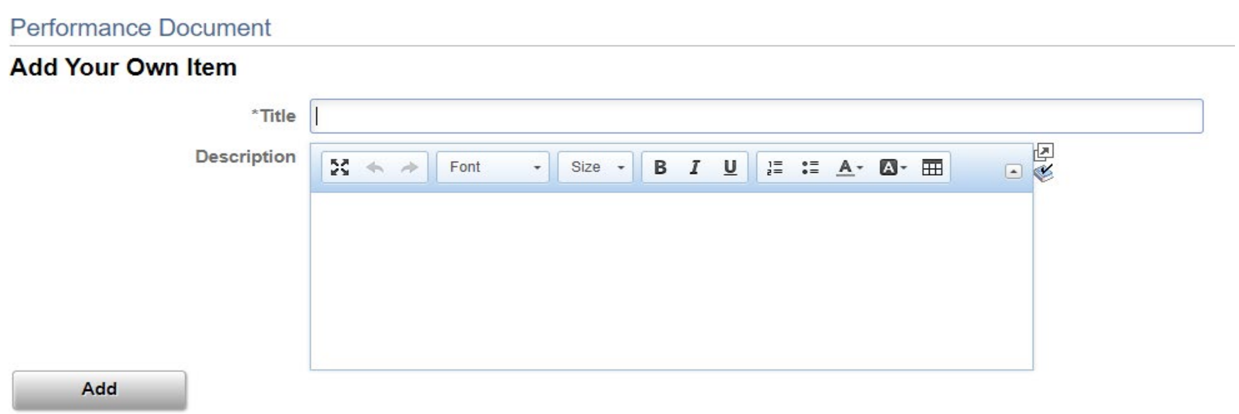
Return

To Add Your Own Item

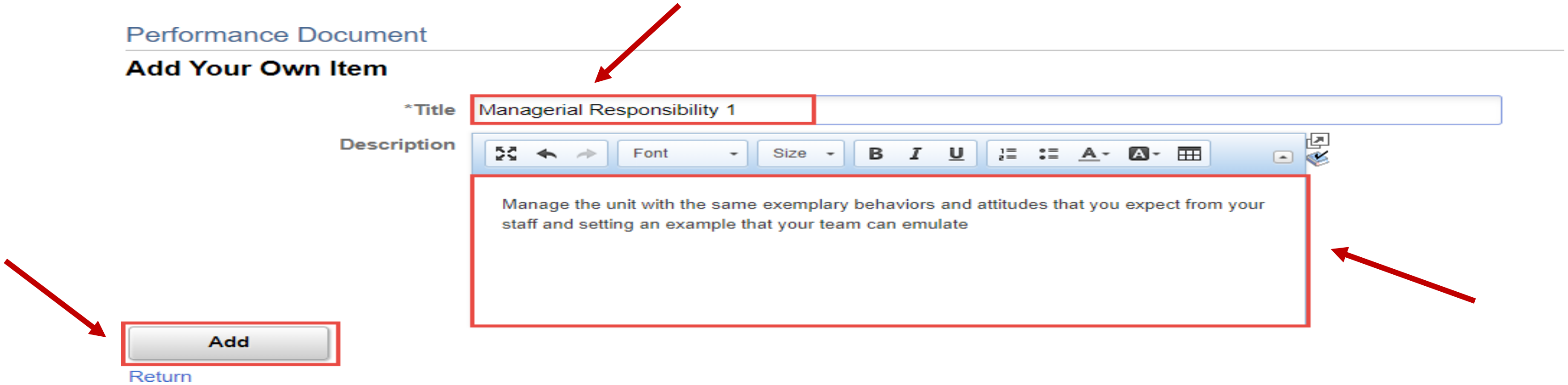
Select Add your own Item and click Next



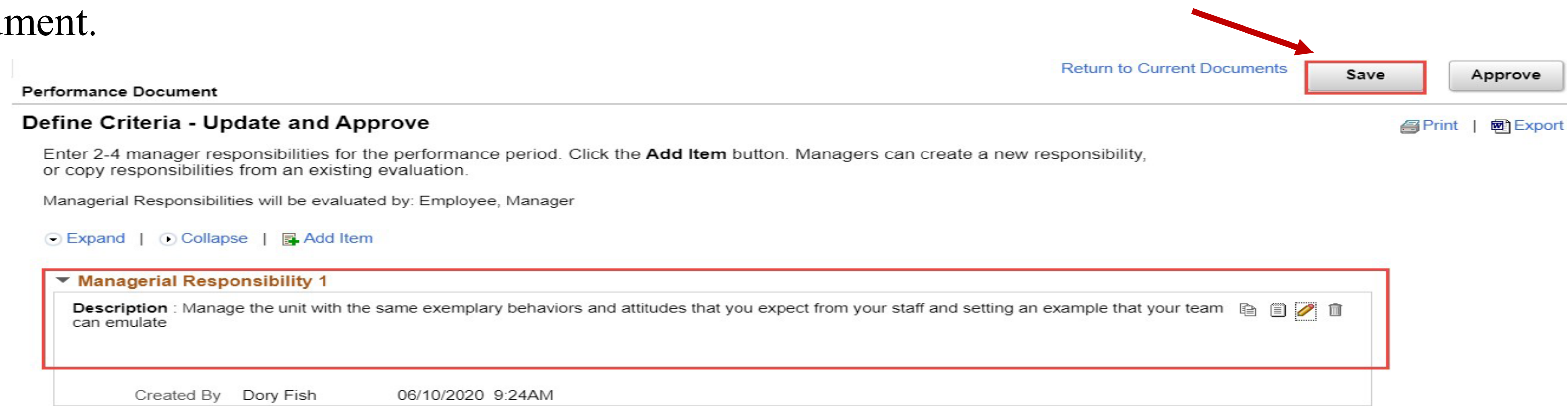
You'll be automatically directed to the Add Your Own Item screen.



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

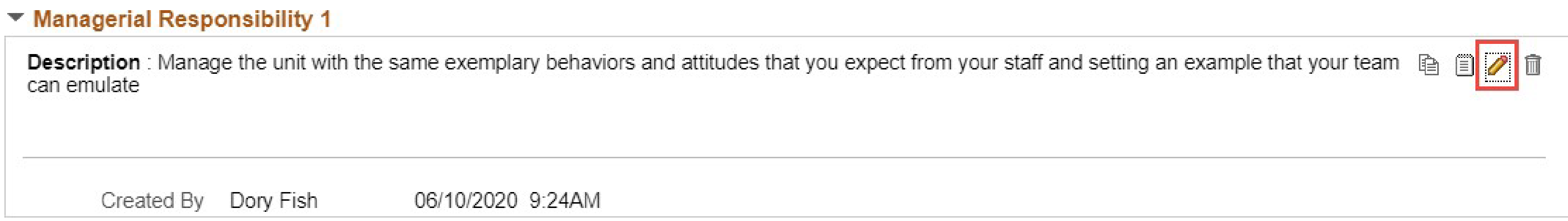


This will take you back to your employee's document where you will now see their managerial responsibility displayed. **Click Save** in the top right corner once you've added an item to your employee's document.

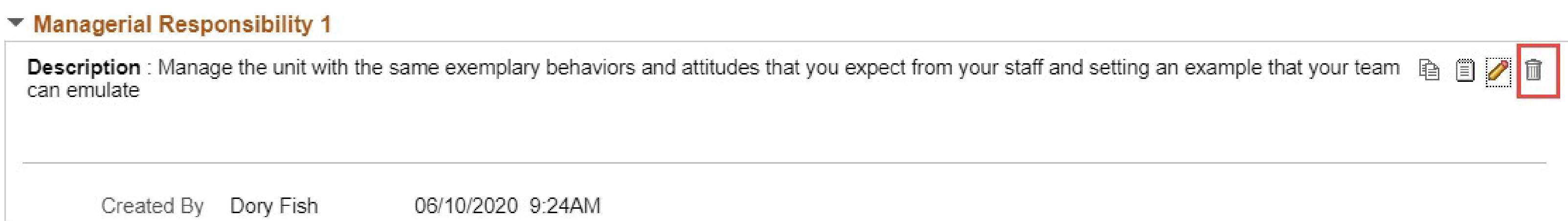


To *add* additional managerial responsibilities repeat these steps.

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



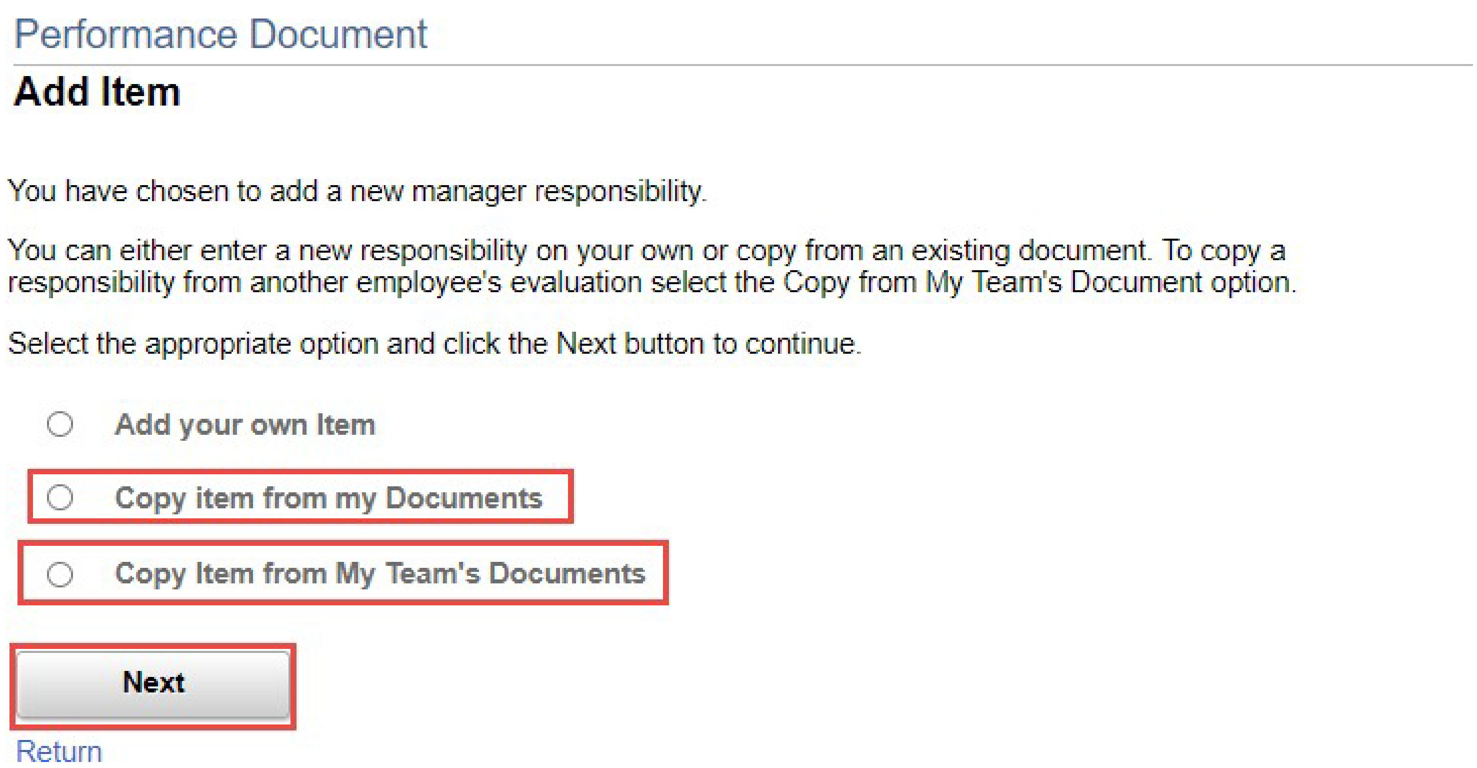
- To *delete* the responsibility, select the trash can icon



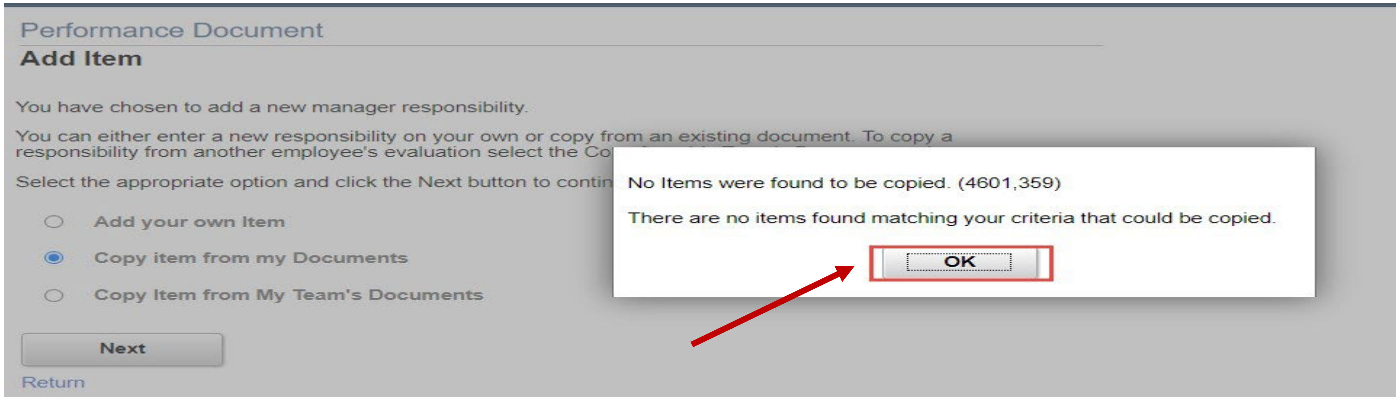
To Copy from Another Document

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

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

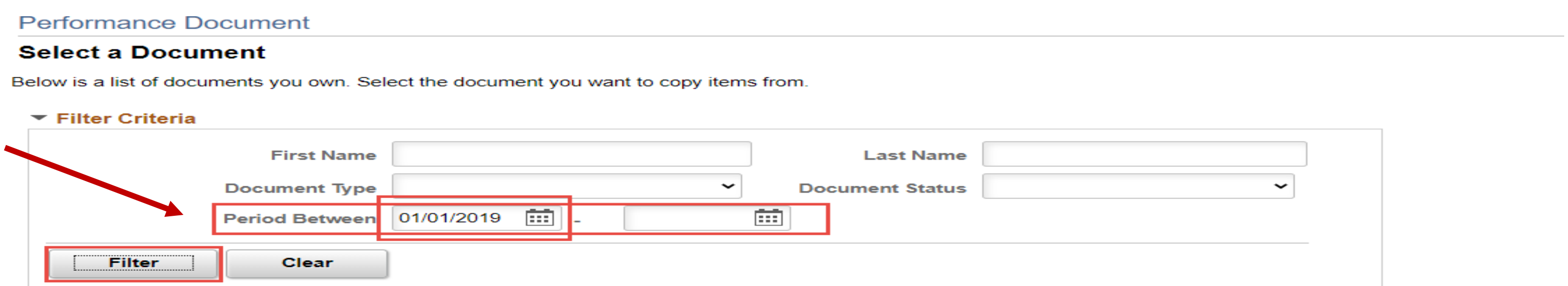


If there are not any items to copy, you will receive a pop-up telling you that there are no items found. Click **OK**.

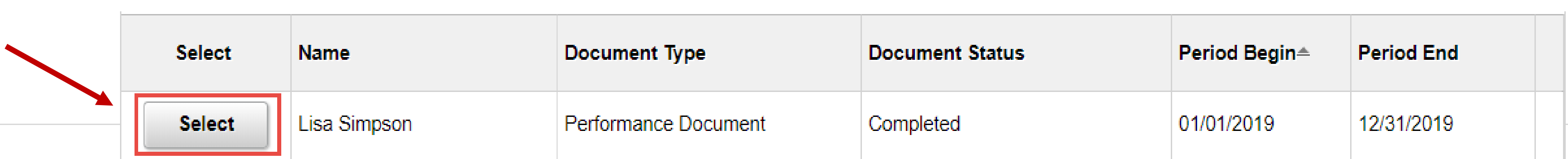


If there are items to copy, you'll be re-directed to a screen that automatically populates the beginning of the current year(Example: 01/01/2020).

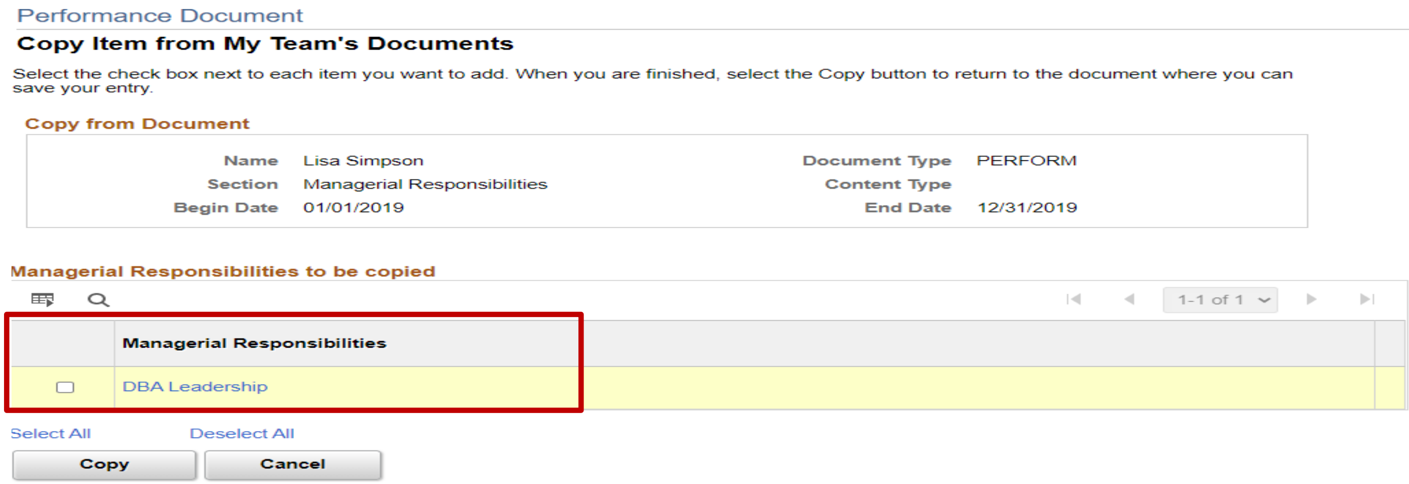
- If you've already established items on an employee's document, you can leave this date as is.
- If you need to select items from a prior years document, you'll update this date to 01/01/YYYY and select Filter.



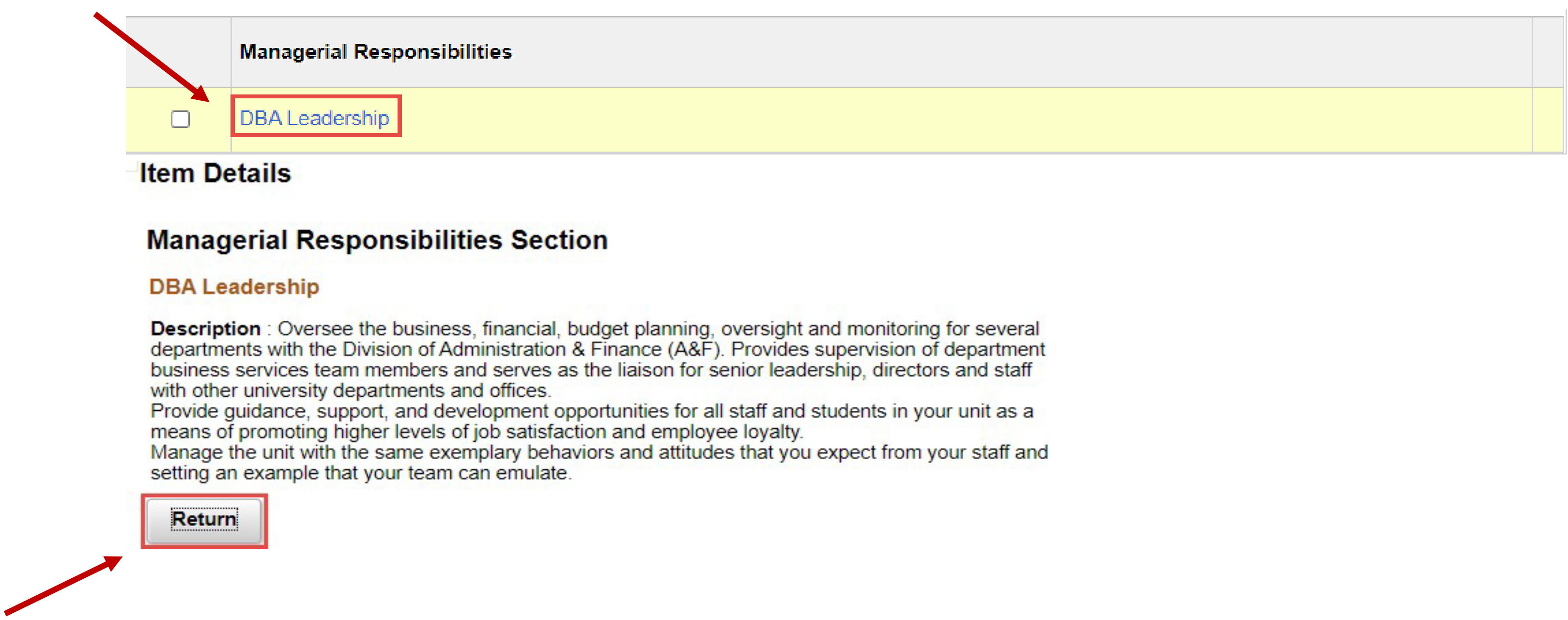
Click **Select** on the employee's document you want to copy items from.



Previously established items will automatically populate.

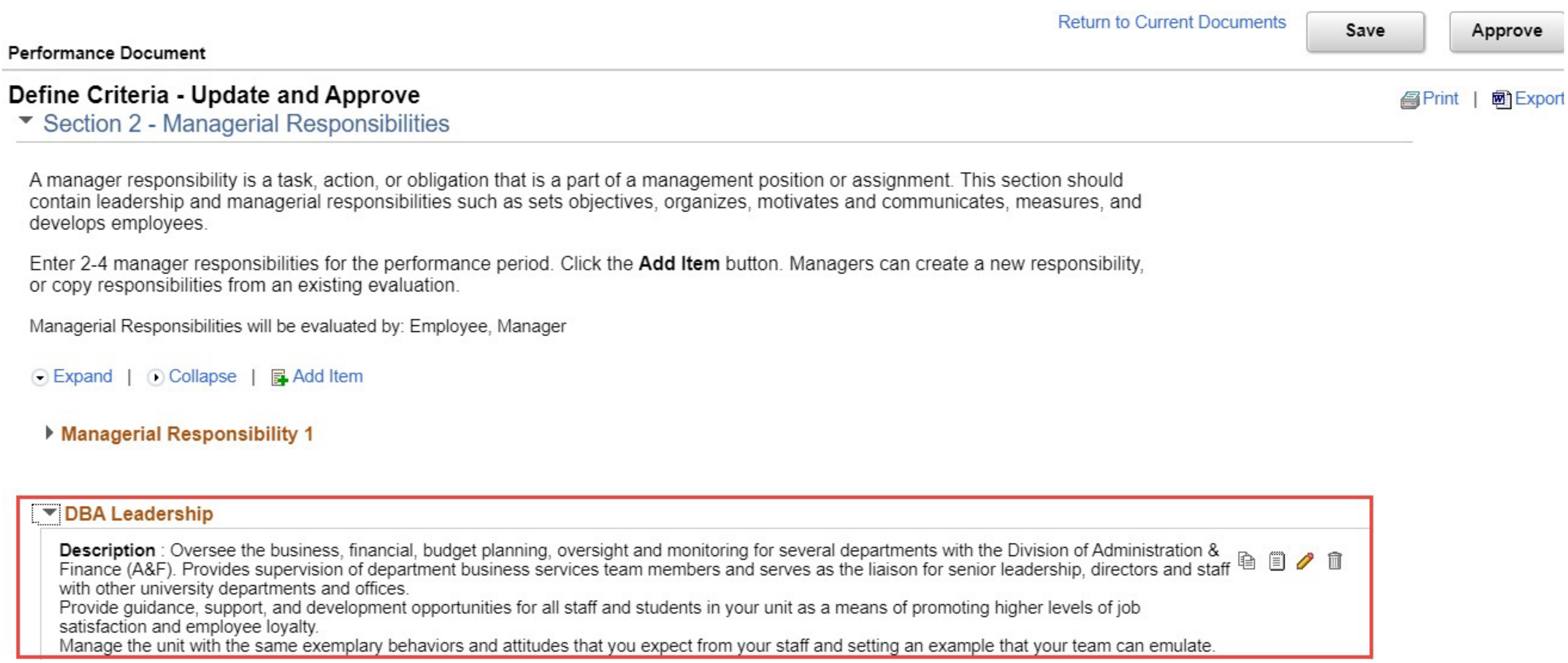


To view the description of this item select the name hyperlinked in blue.
You'll be re-directed to a description of the item. Once finished viewing the description, select Return.

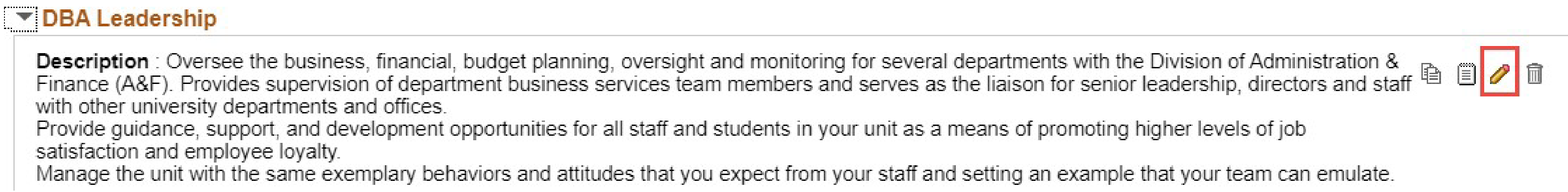


Select the box to the left of the populated item and click Copy.

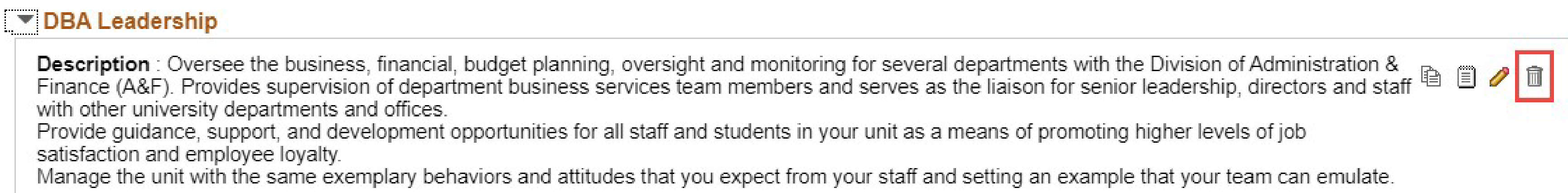
You'll be re-directed back to your employee's current document where the copied item has been added.



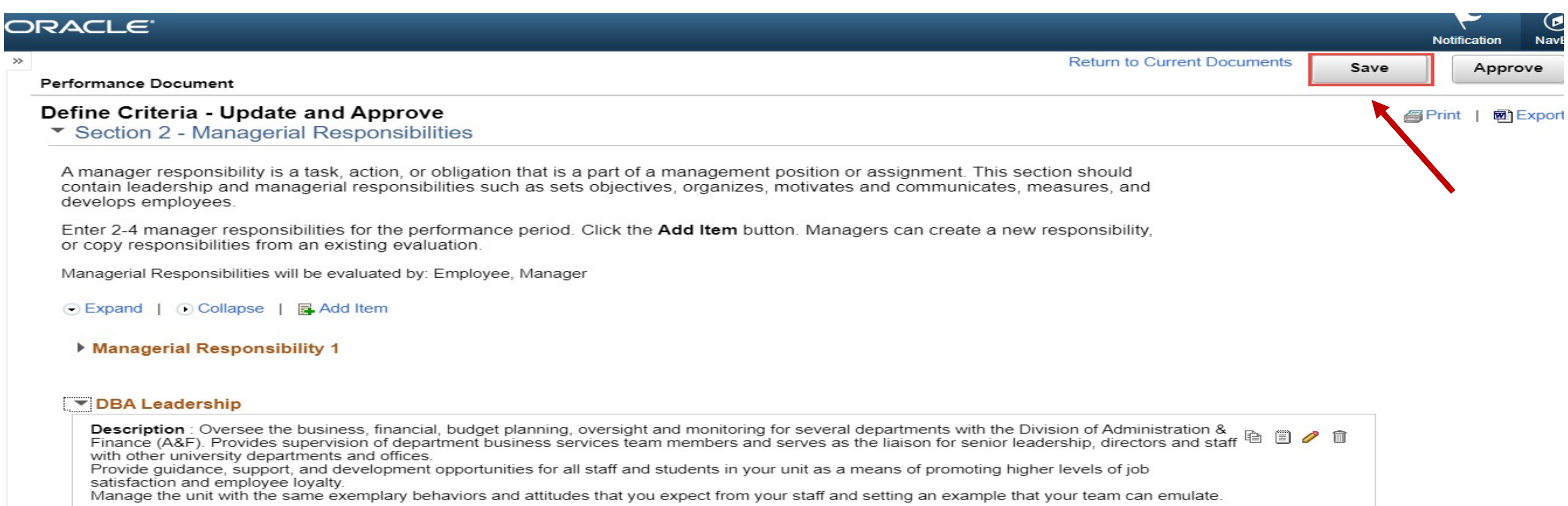
- To ***edit*** the responsibility, select the pencil icon



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



Select **Save**.



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.

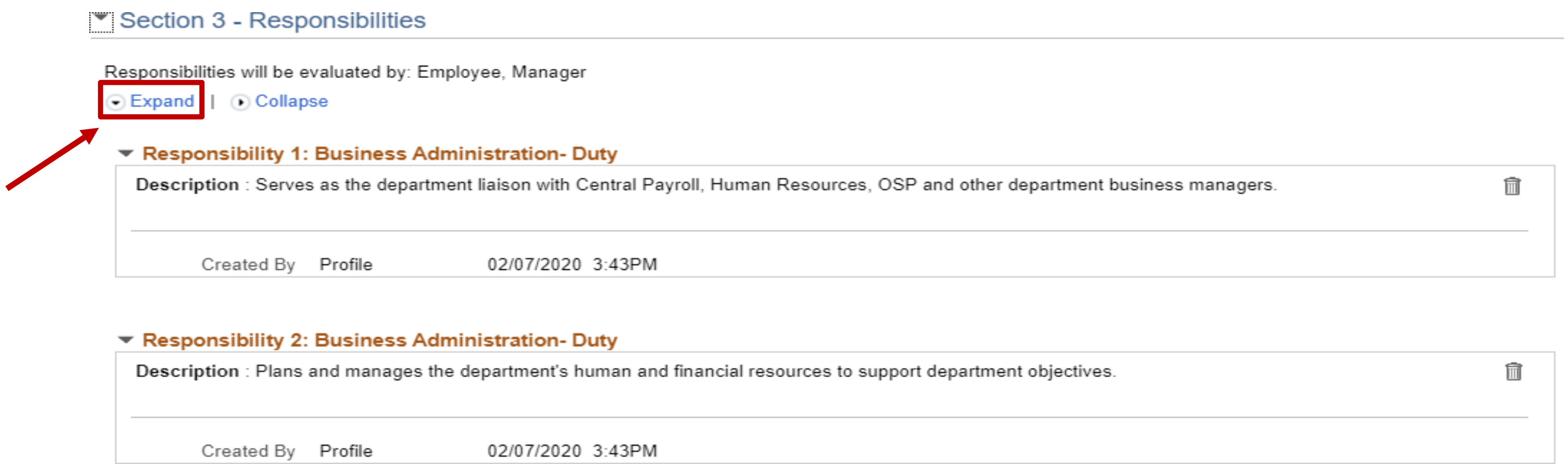
To see the description under each of these duties select **Expand**.

- 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 ofthem, 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 isthe case to discuss options.

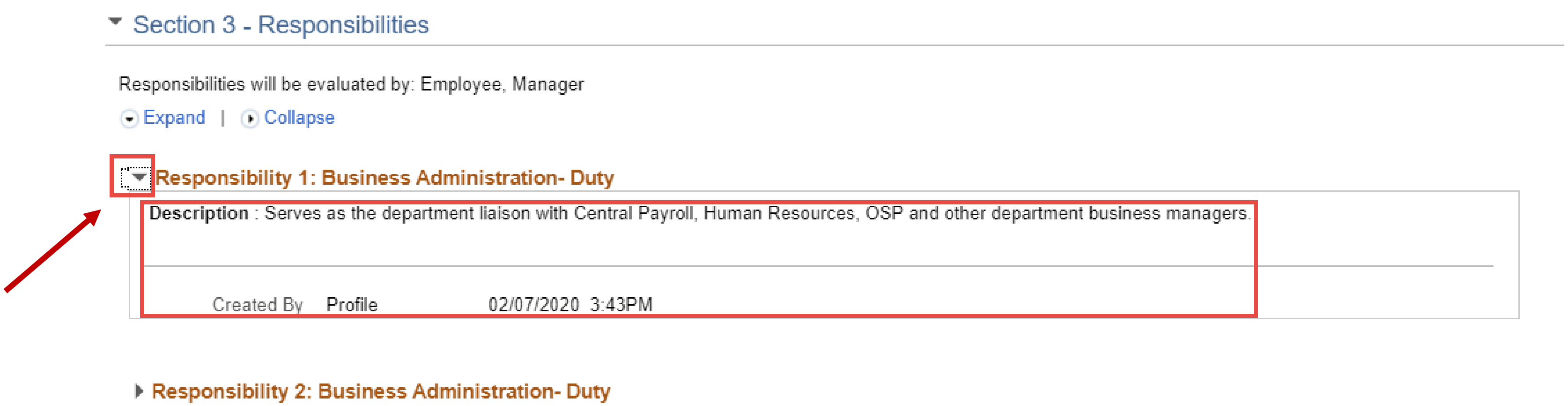
See next page for additional instructions.

To View Responsibilities
Expand the Responsibilities by 1 of 2 ways;

- Expand All – Select Expand

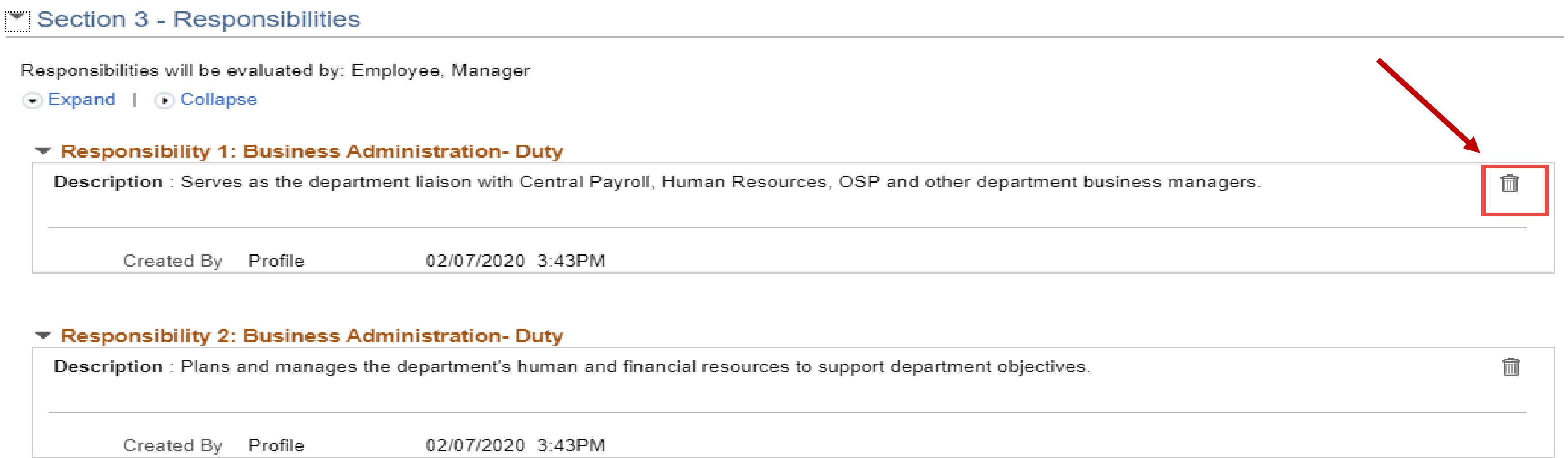


- Expand Individual Items – Select the arrow to the left of the individual responsibility listed

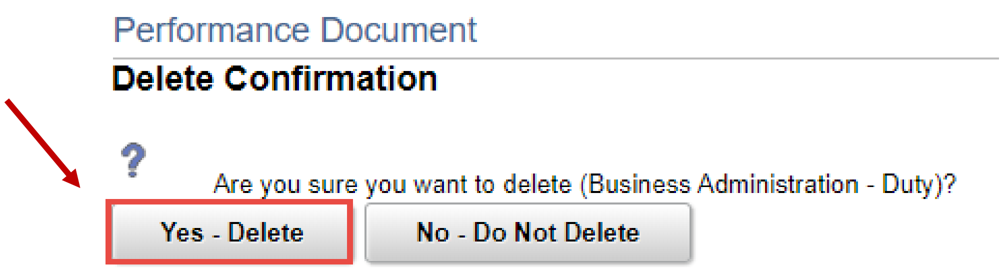


To Delete Responsibilities

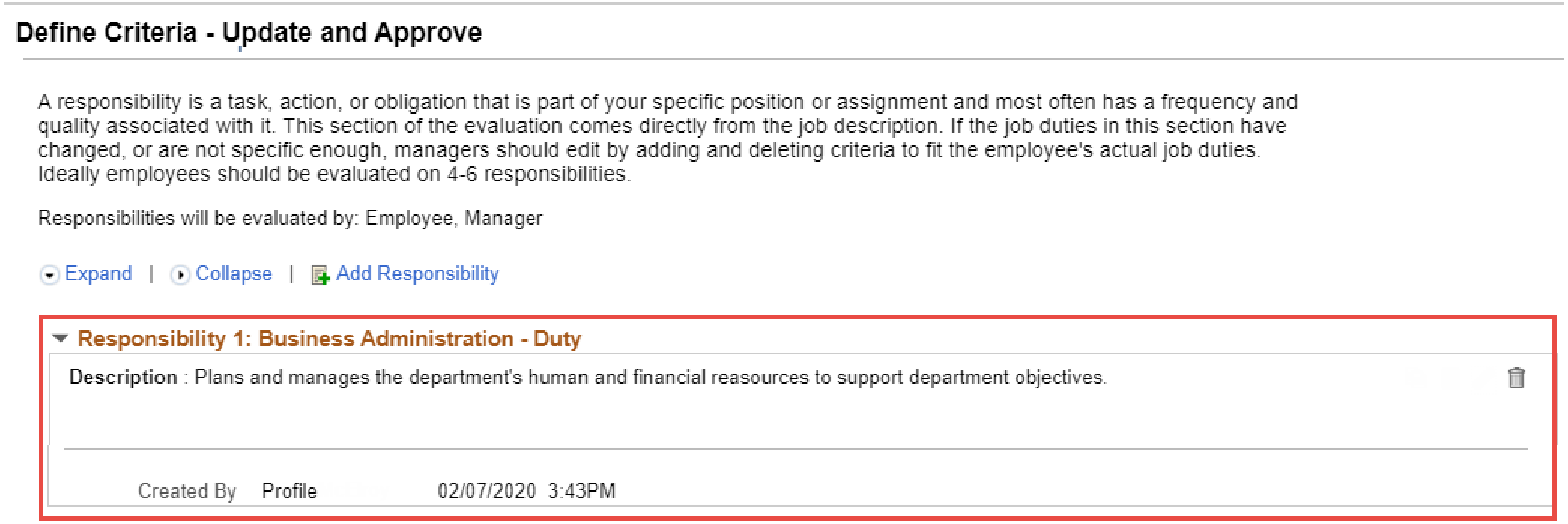
To delete responsibilities, **click the trash can icon**.



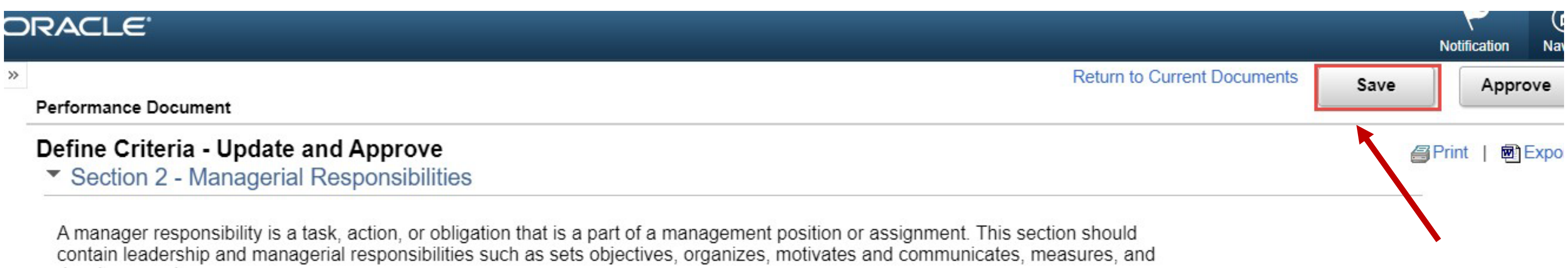
You'll be asked to confirm you want to delete this responsibility, click Yes - Delete.



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

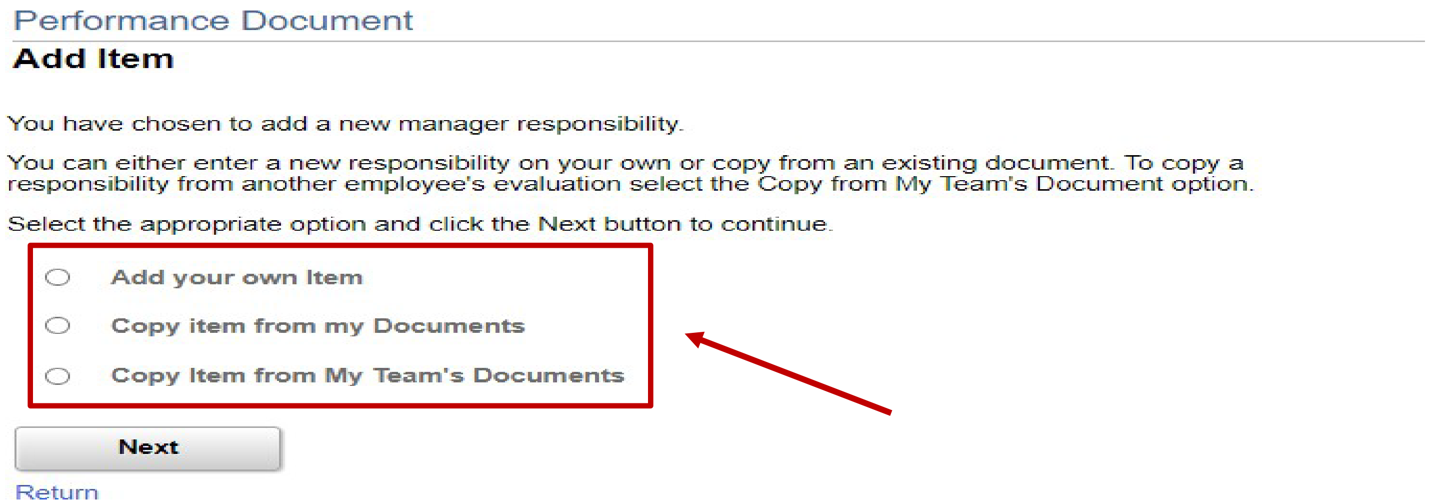


Click **Save** in the top right corner once you've added an item to your employee's document. Repeat this process to delete any additional responsibilities.



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.

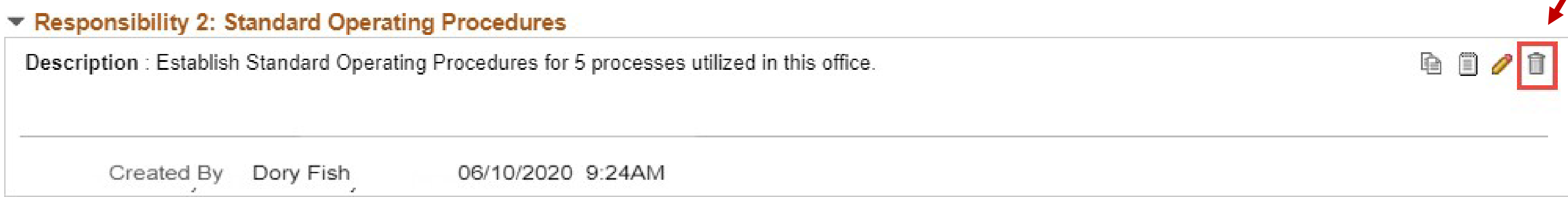


This will take you back to your employee's document where you will now see your employee's responsibility displayed.

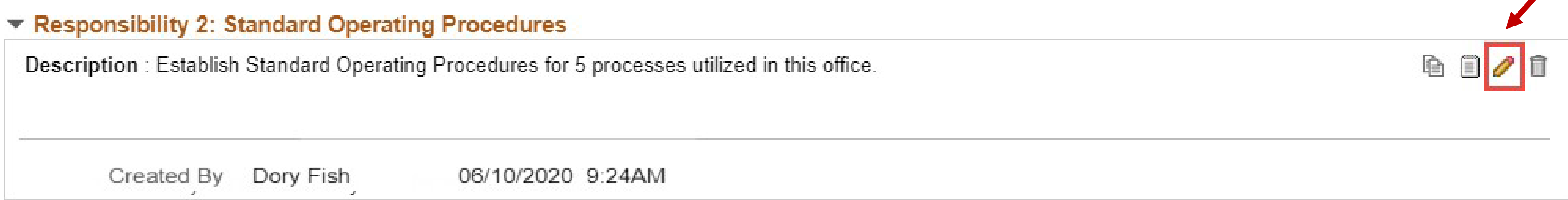
Click **Save** in the top right corner once you've added an item to your employee's document.

- Repeat this process to ***add*** additional responsibilities.

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



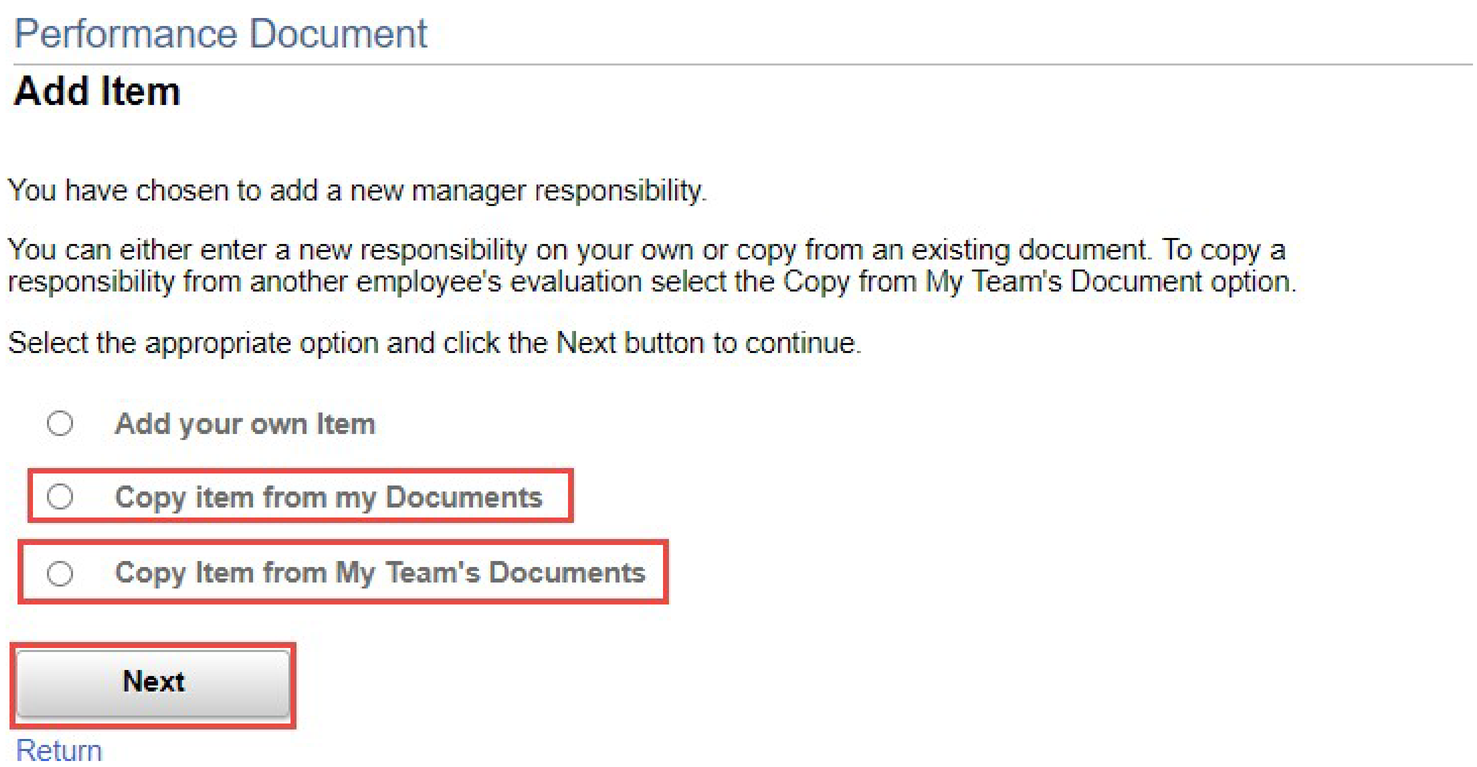
- To ***delete*** the responsibility, select the trash can icon



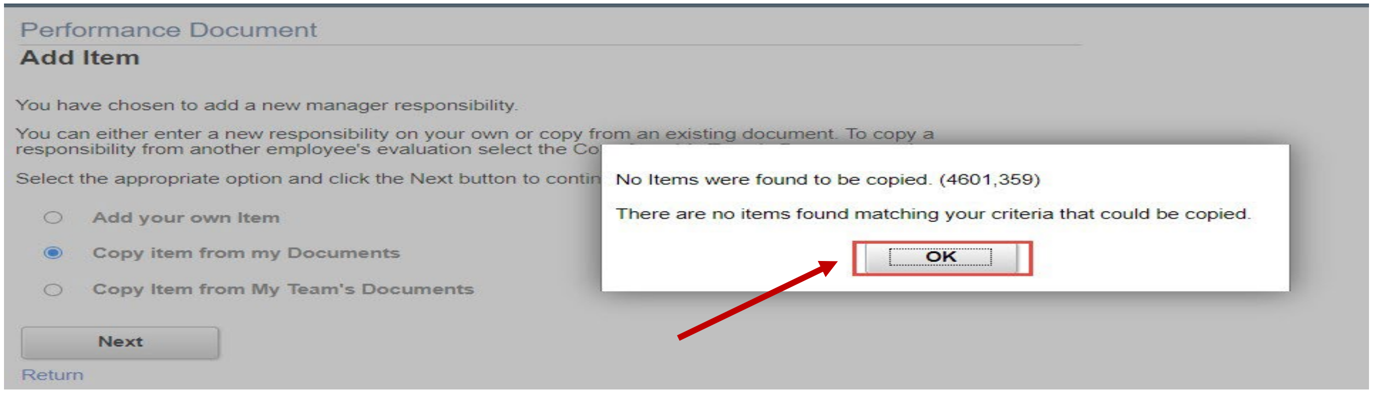
To Copy from Another Document

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

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

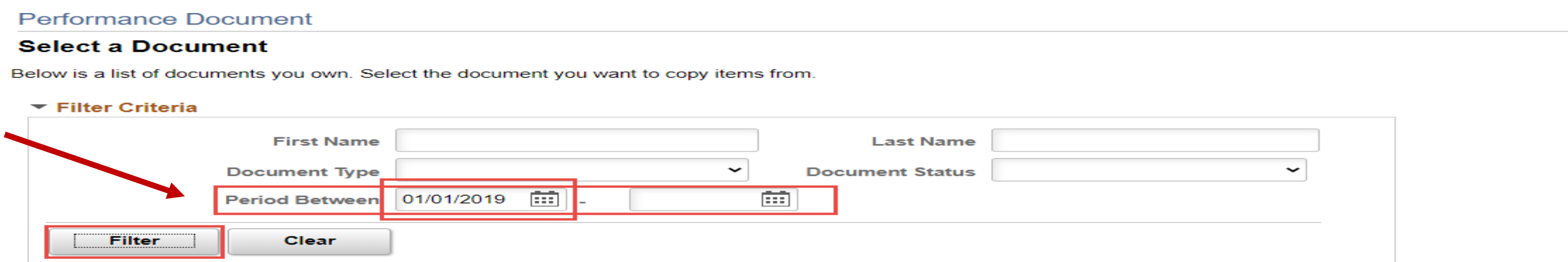


If there are not any items to copy, you will receive a pop-up telling you that there are no items found. Click **OK**.

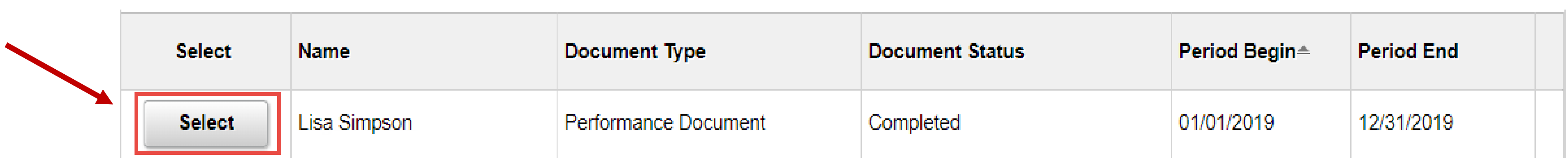


If there are items to copy, you'll be re-directed to a screen that automatically populates the beginning of the current year(Example: 01/01/2020).

- 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.

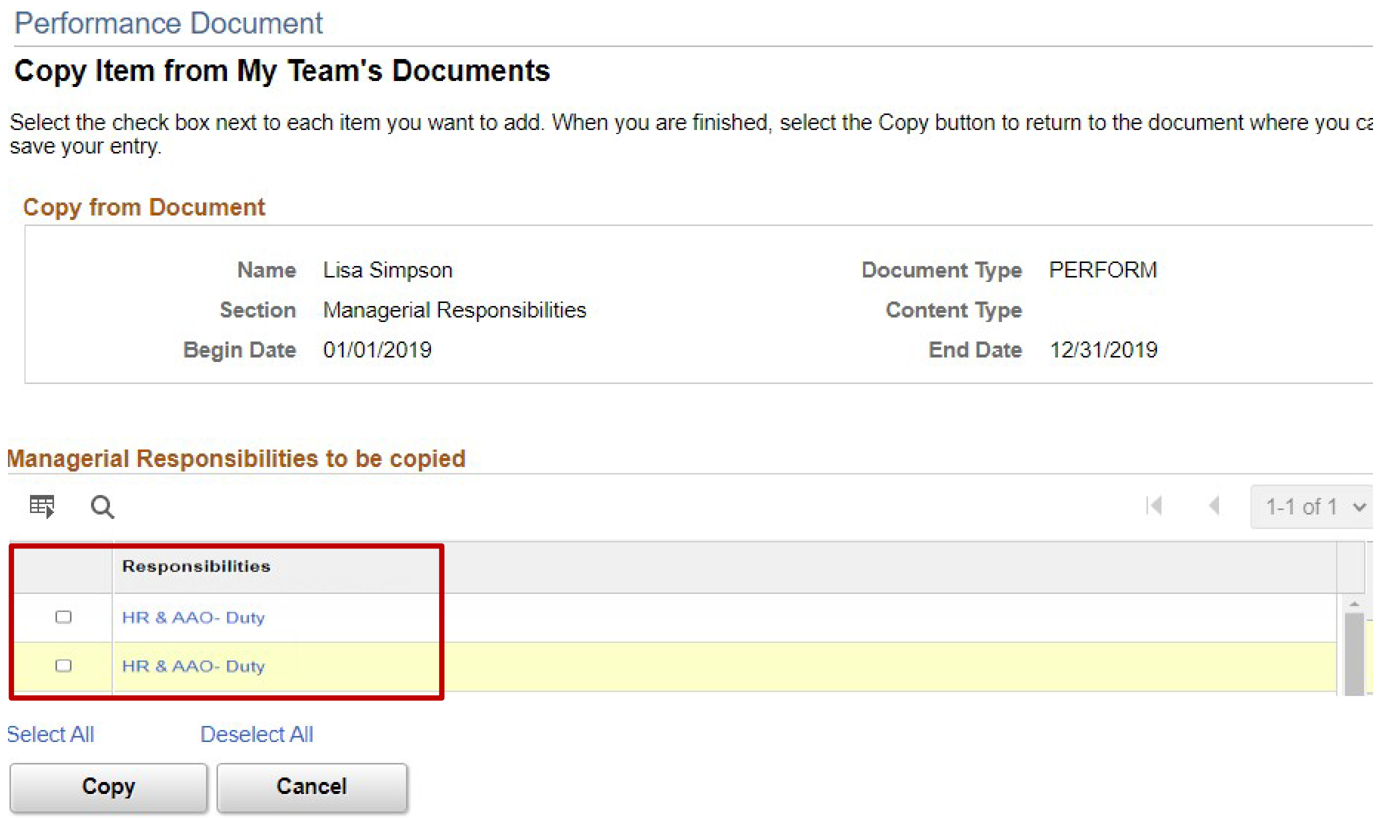


Click **Select** on the employee's document you want to copy items from.



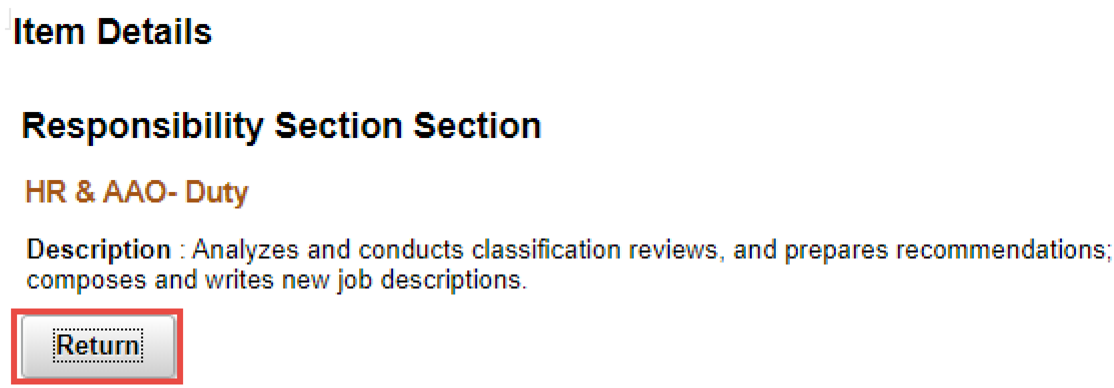
Select	Name	Document Type	Document Status	Period Begin	Period End
Select	Lisa Simpson	Performance Document	Completed	01/01/2019	12/31/2019

Previously established items will automatically populate.



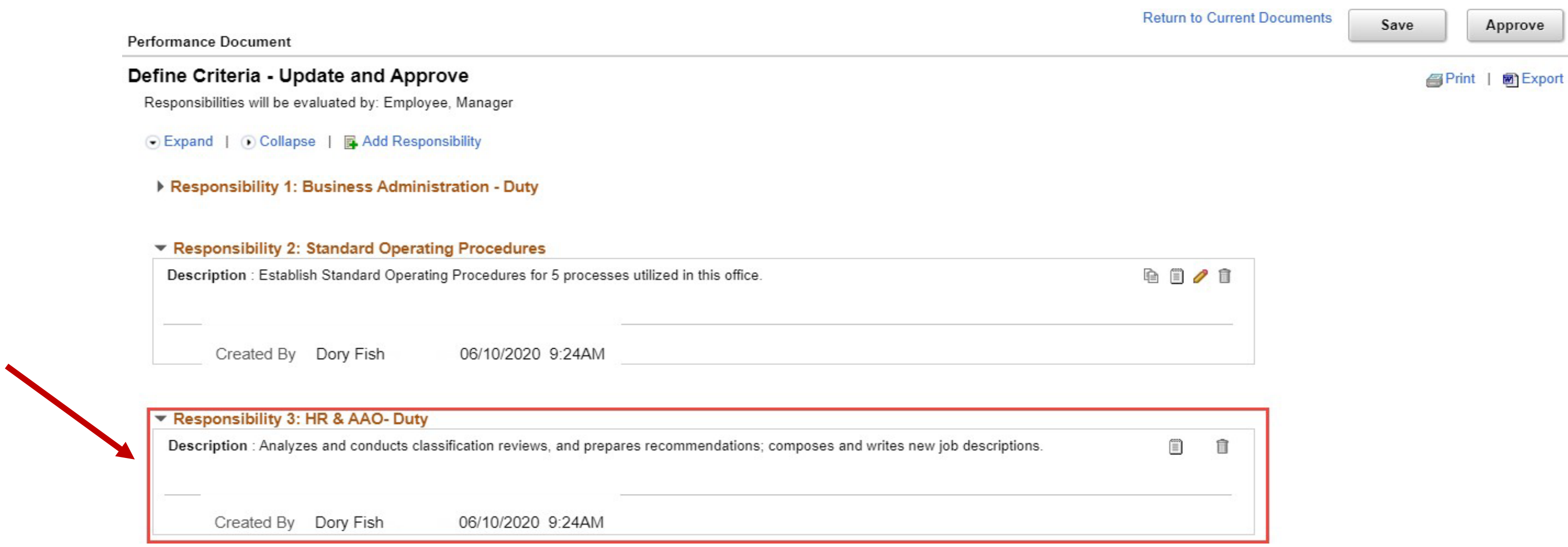
To view the description of this item select the name hyperlinked in blue.

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

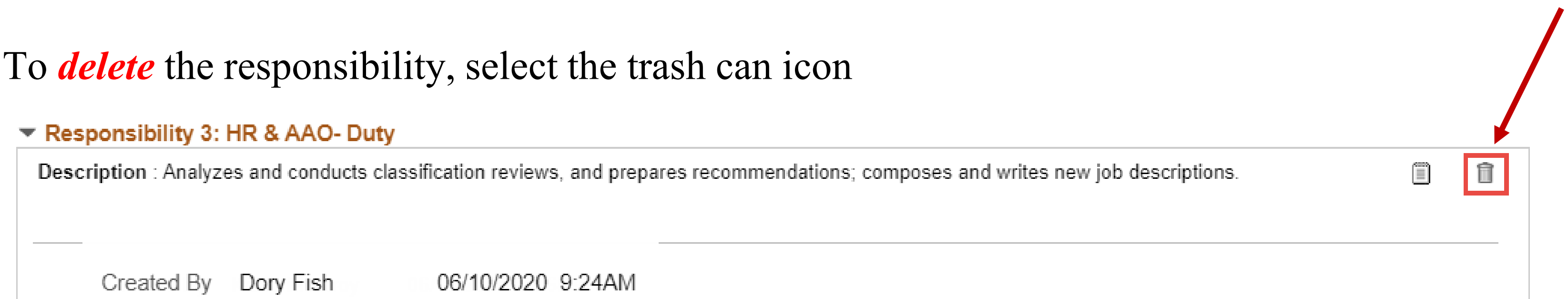


Select the box to the left of the populated item and click **Copy**.

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

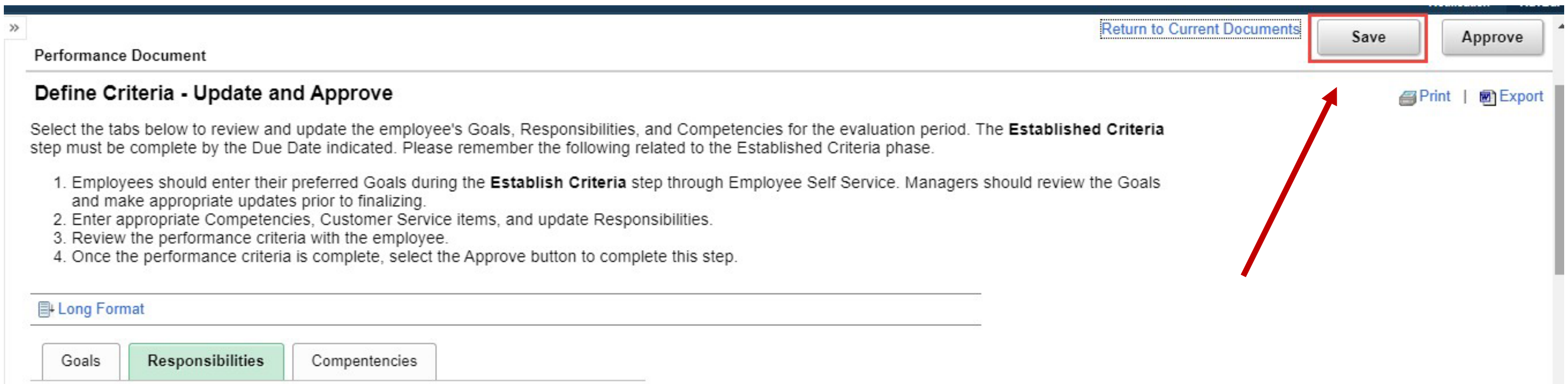


- To ***delete*** the responsibility, select the trash can icon



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.



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.

To Add A Competency

Select **Add** Competency.

Goals | Responsibilities | Compentencies

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

Add Competency

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.

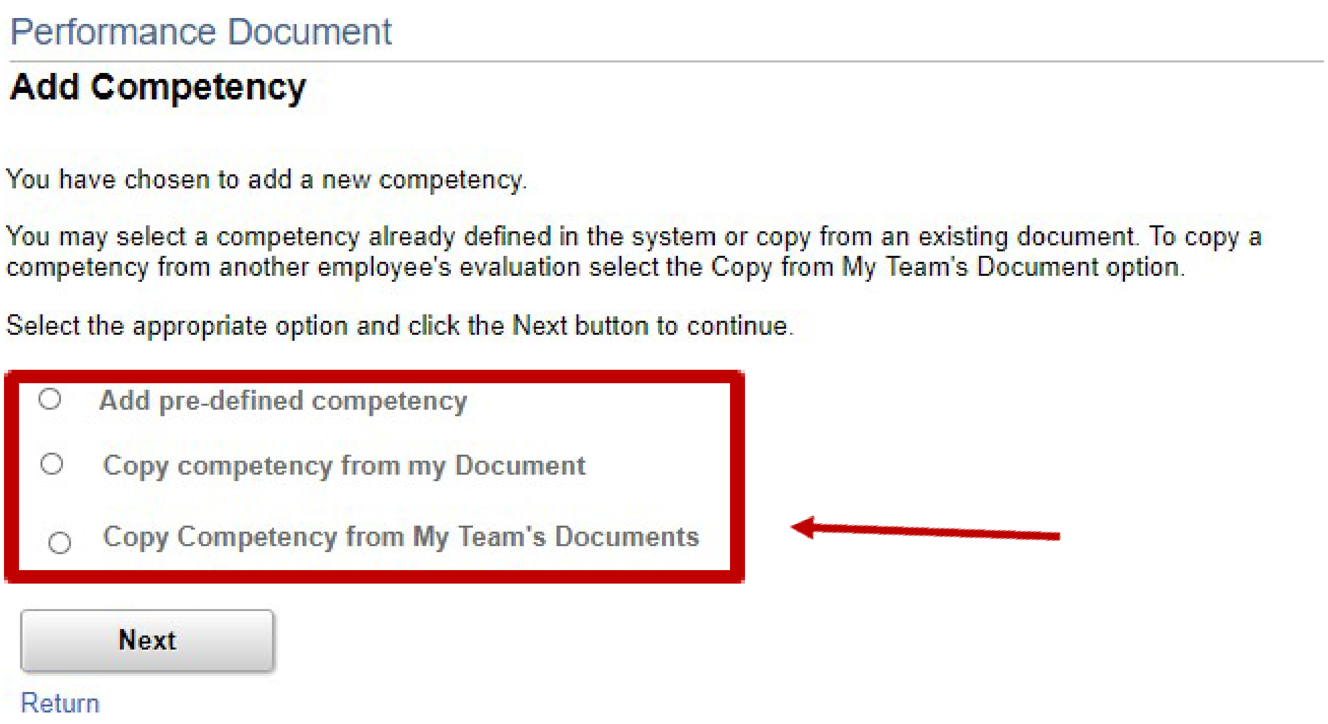
Select the appropriate option and click the Next button to continue.

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

Next

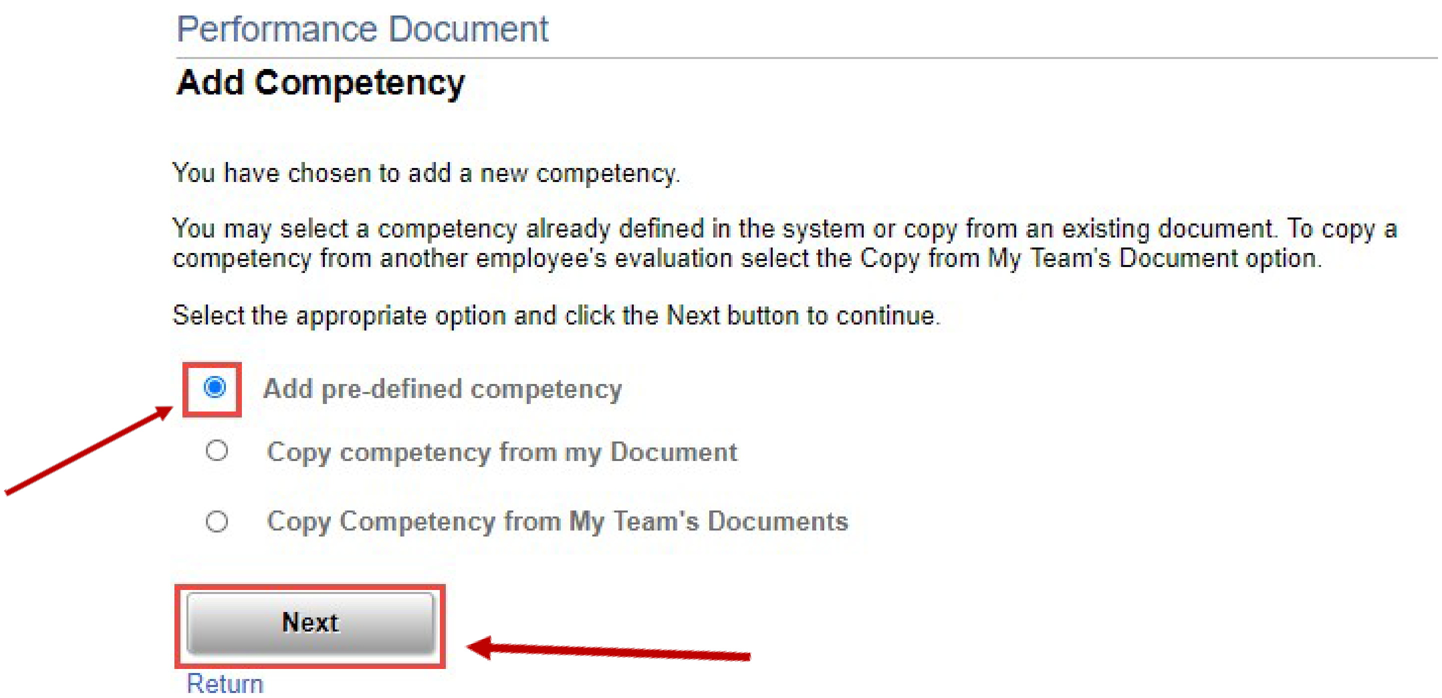
Return

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.

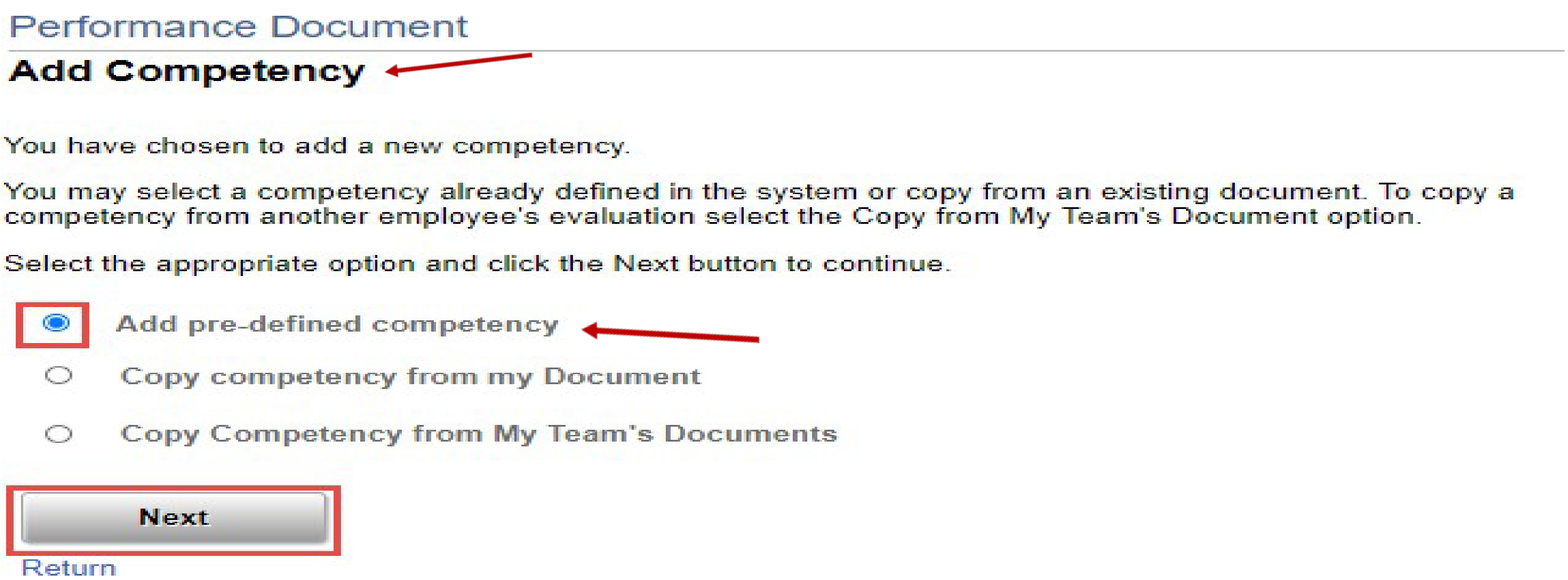


To Add a Pre-Defined Competency Item

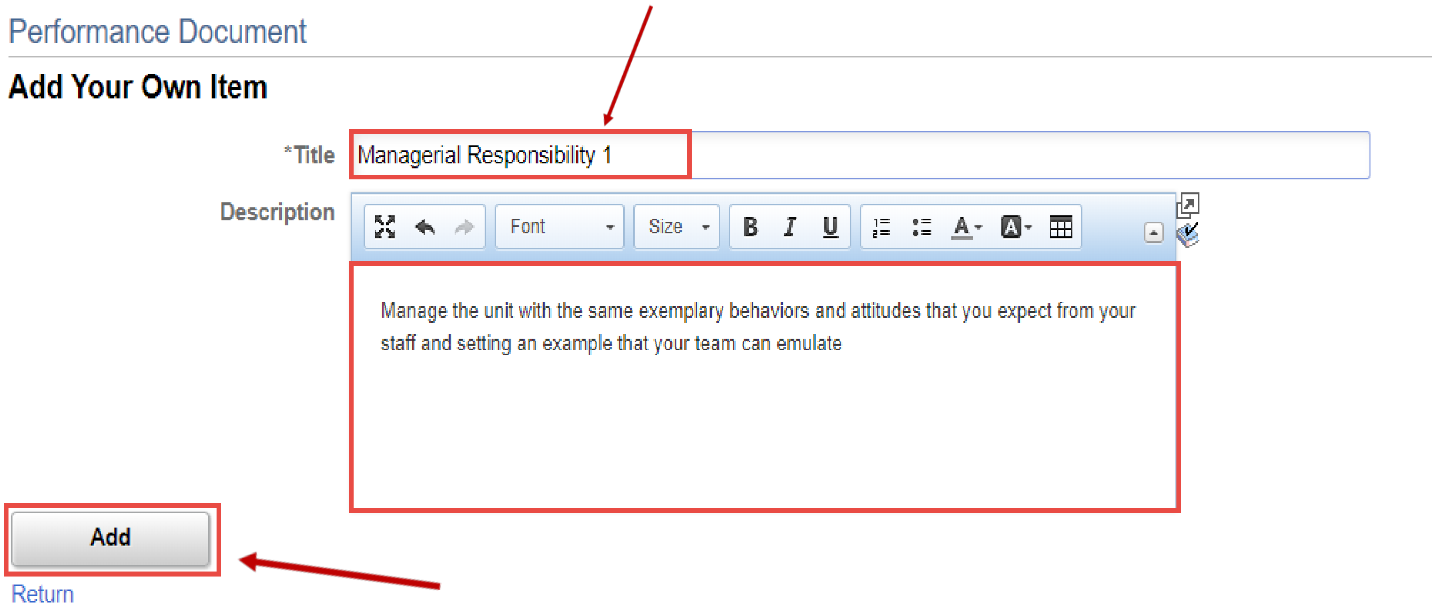
Select Add pre-defined competency and click **Next.**



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



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



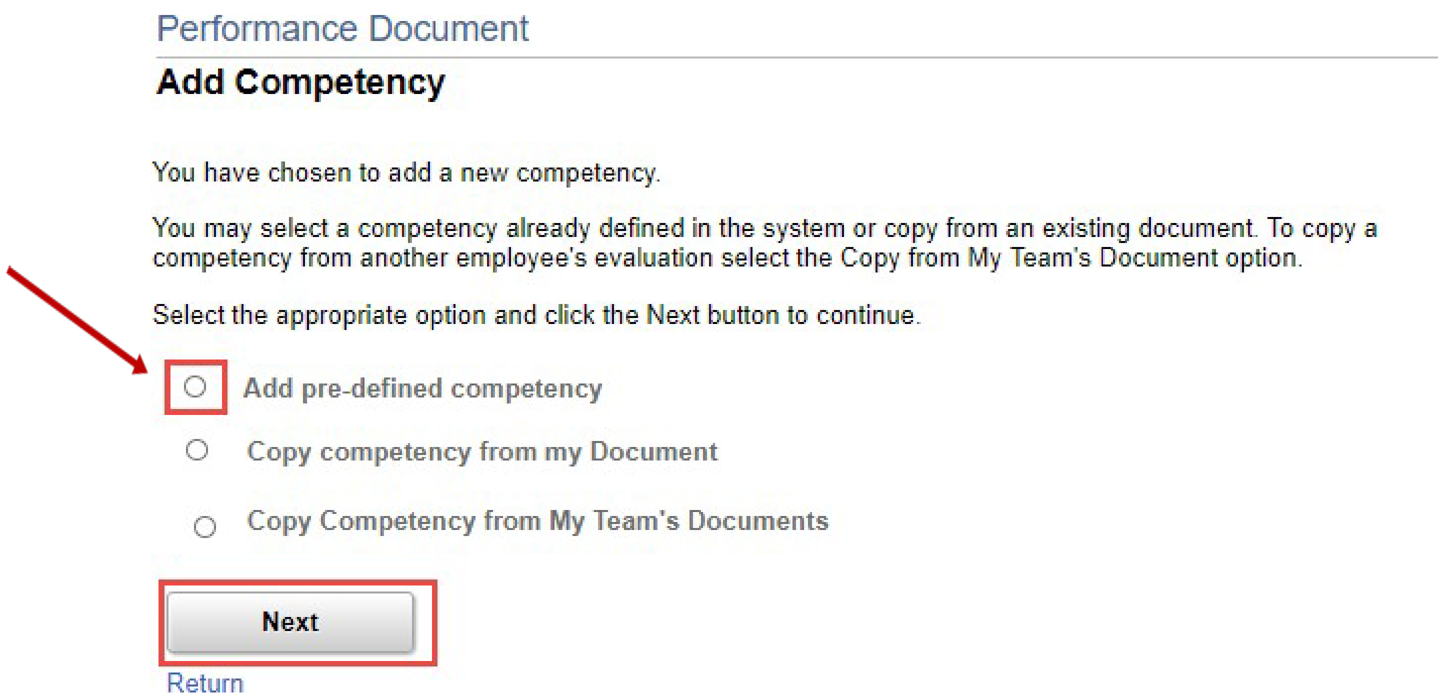
This will take you back to your employees document where you will now see your employees managerial responsibilitydisplayed.

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

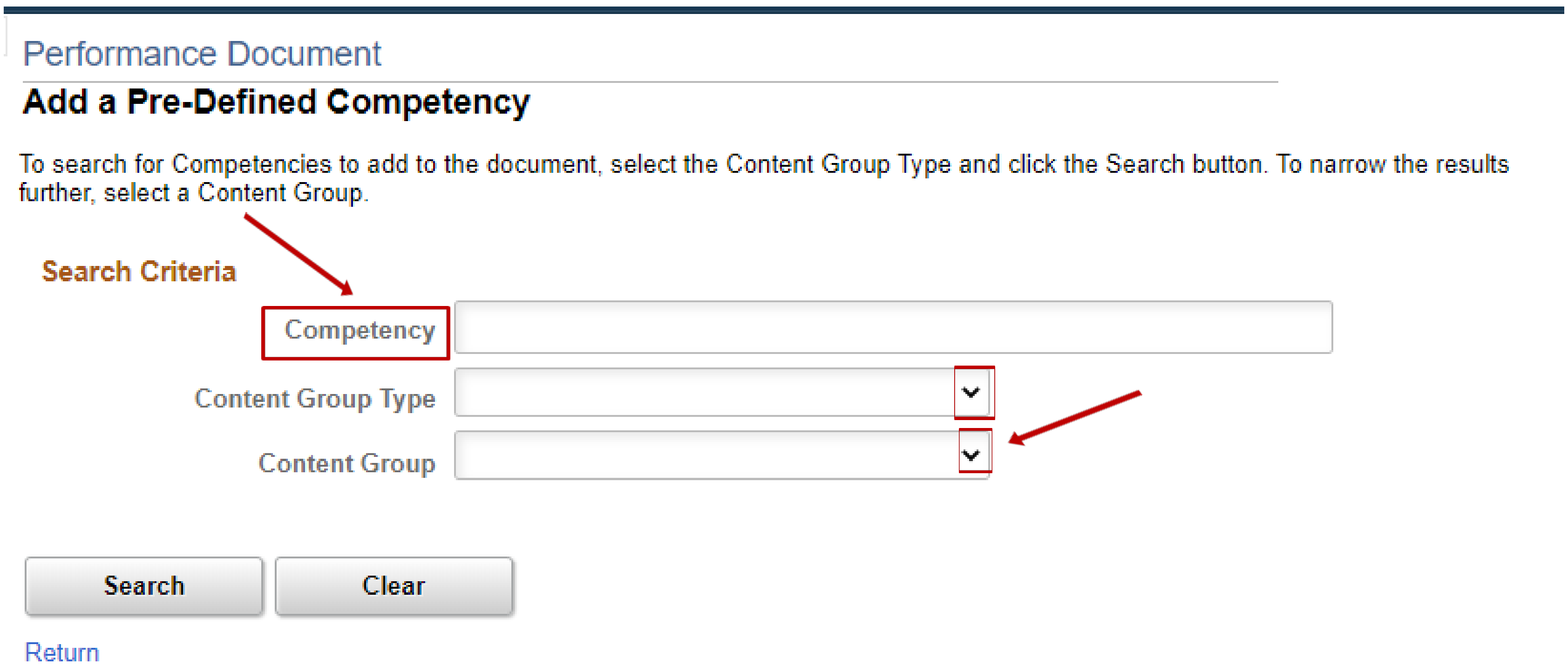
To Add Pre-Defined Competency

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



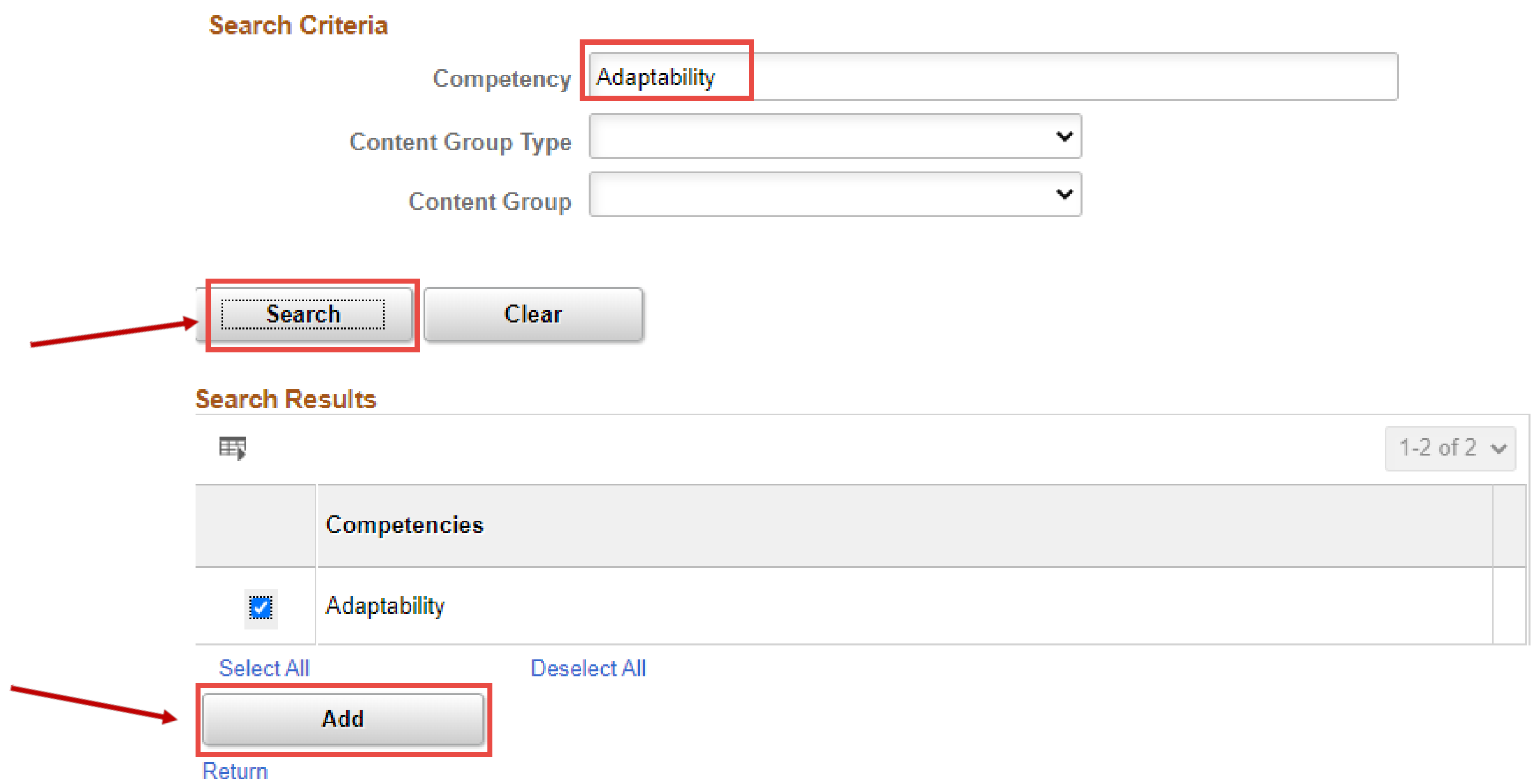
You can search for a pre-defined competency by 1 of 2 ways;

- 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.



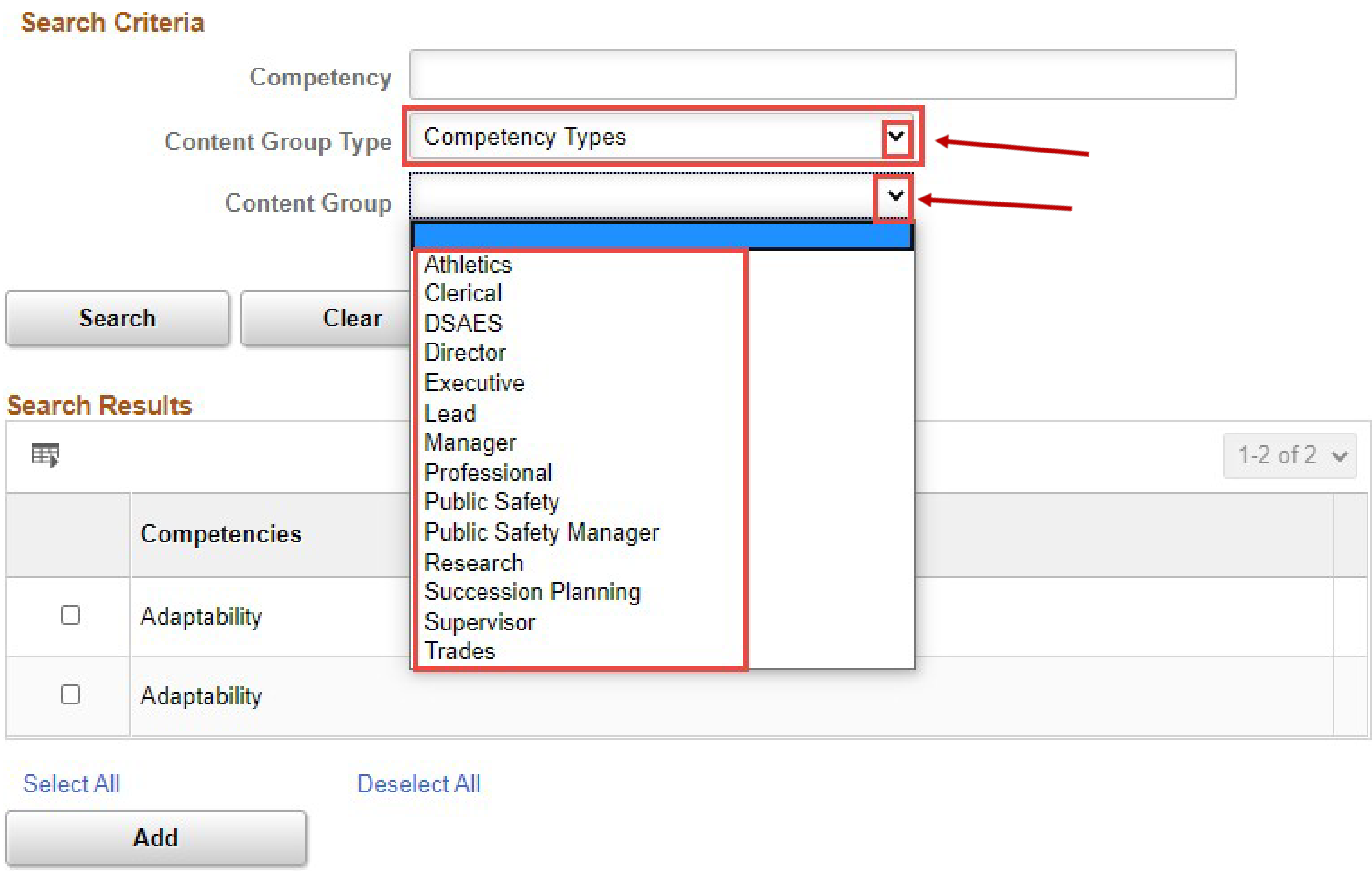
Based on the Standard Competency list, enter the Competency Item name in the Competency section and click **Search.** The Competency will populate at the bottom, **check the box to the left** of the Competency, click **Add**.

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.

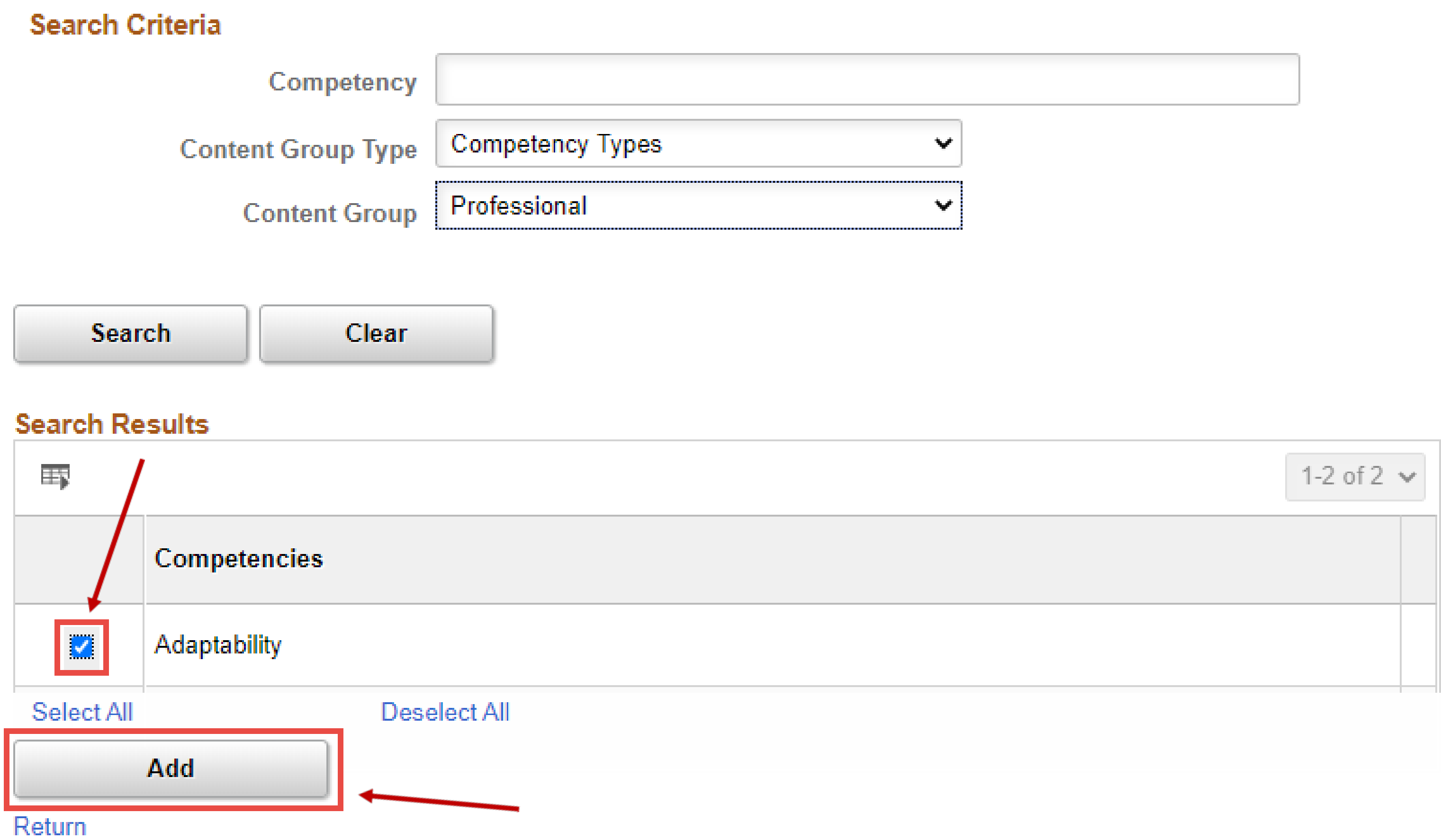


To manually search for Competencies using the drop down arrows in the Content Group Type OR Content Group sections;

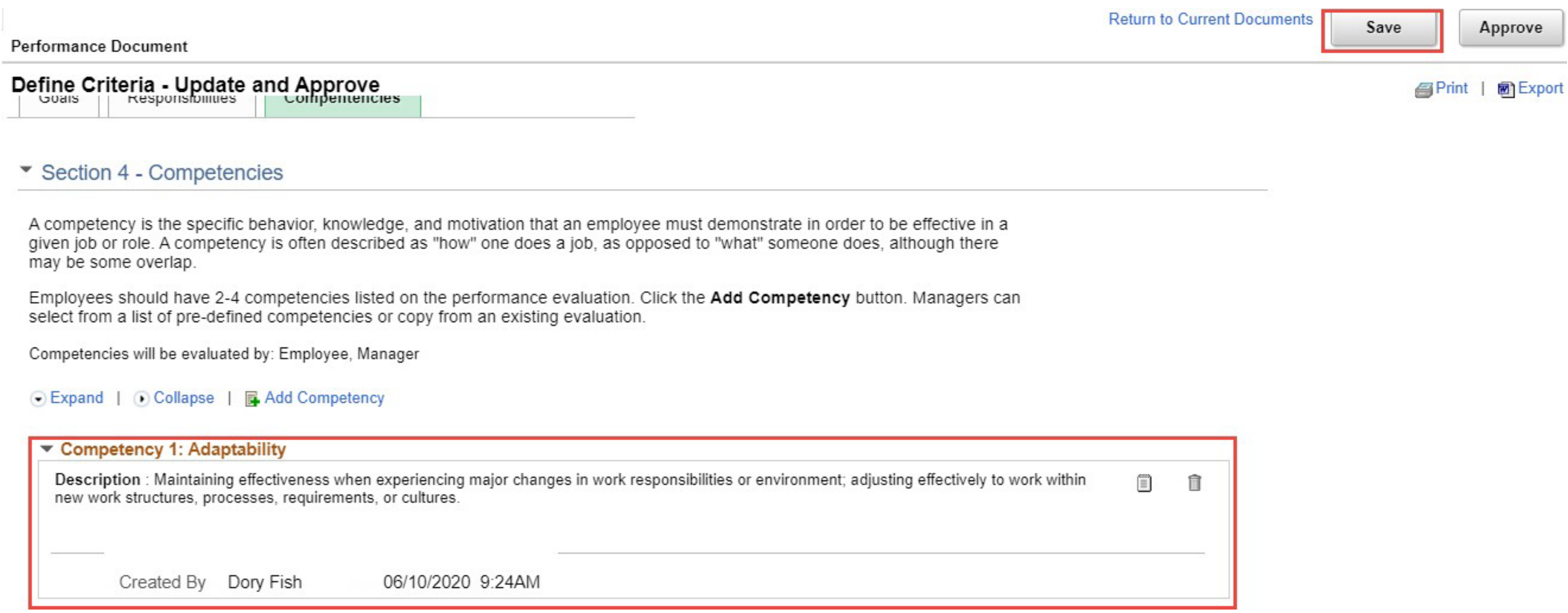
- Select the drop-down arrow next to the blank box in **Content Group Type** and select Competency Types.
- Select the drop-down arrow next to the blank box in **Content Group**. A list of different content groups will populate,select the one that best applies to your employees position.



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



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.

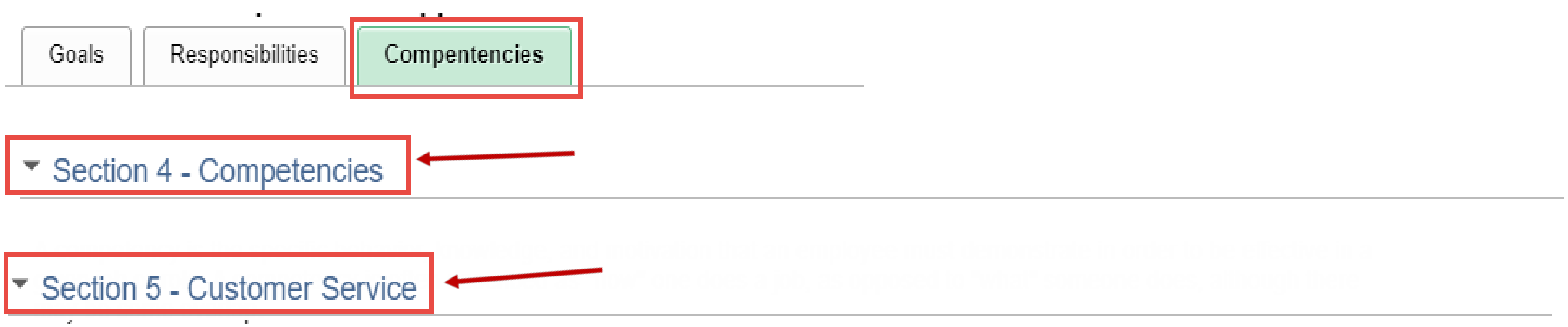


<u>Customer Service Section</u>

Select the Competencies Tab where additional sections can be found.

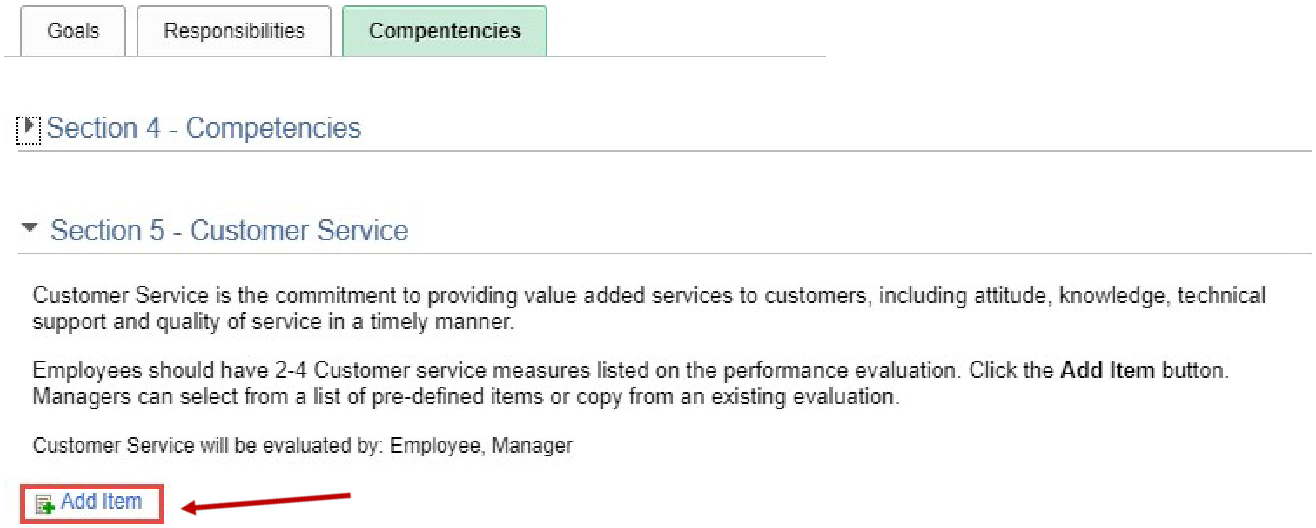
- Section 4 – **<u>Competencies</u>:** Describes "how" one does a job, as opposed to "what" someone does. The specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role.
  Standard Competencies can be found <u>here</u>.

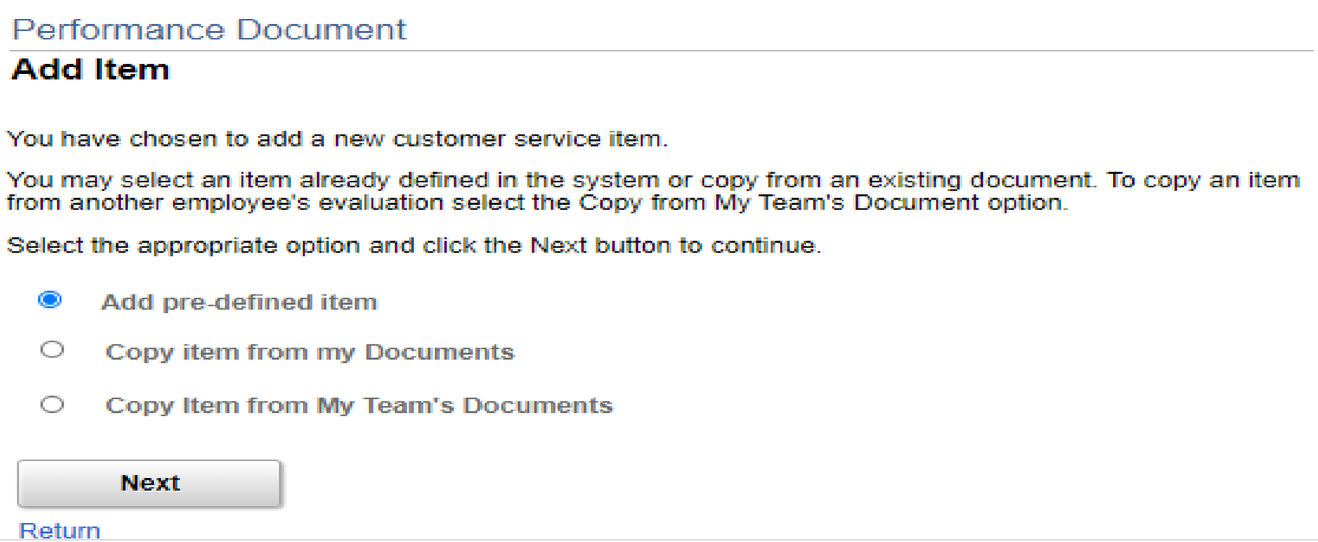
- Section 5 – **<u>Customer Service</u>**: Describes services to customers.
  Customer Service Measures can be found <u>here</u>.



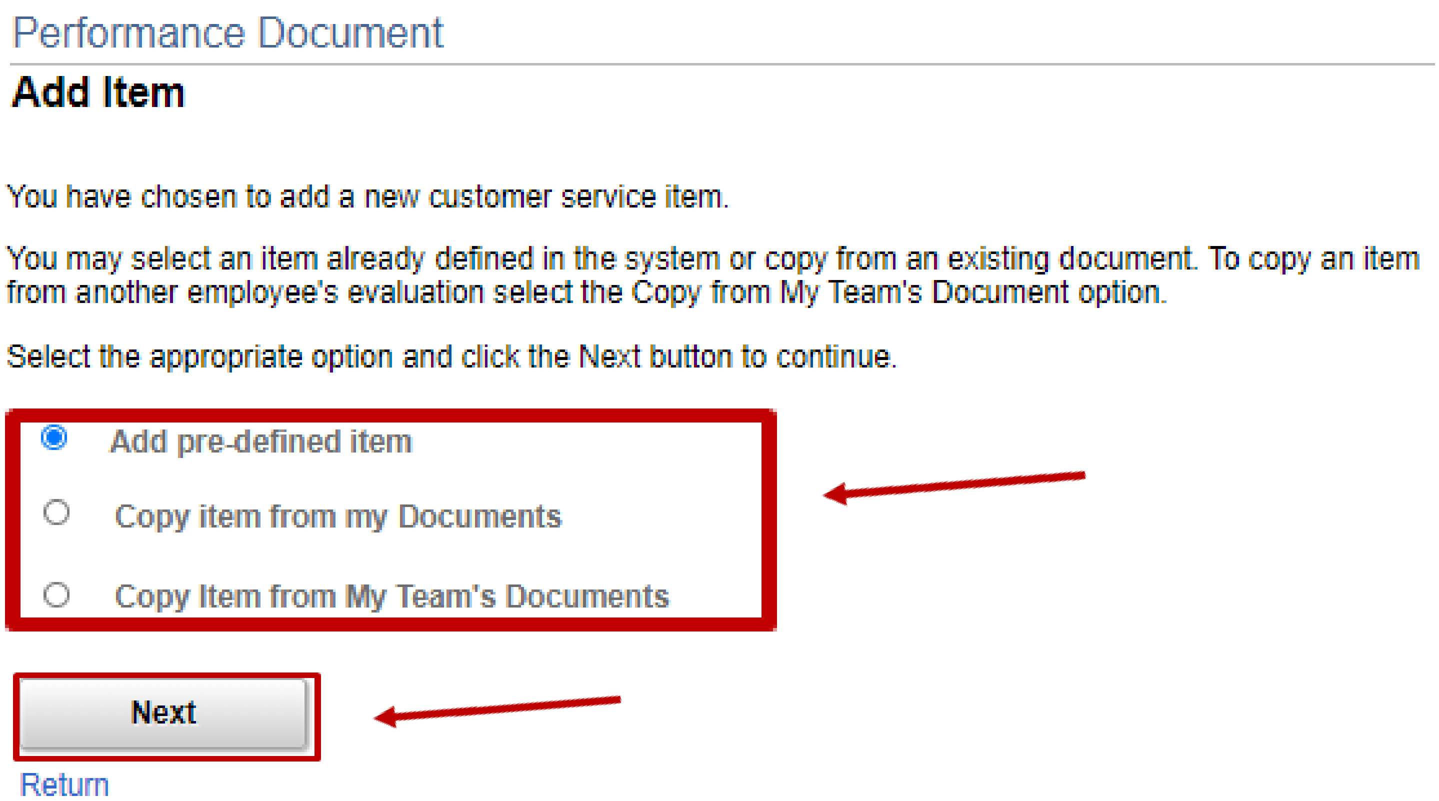
To Add A Customer Service Measure

Select **Add Item**.



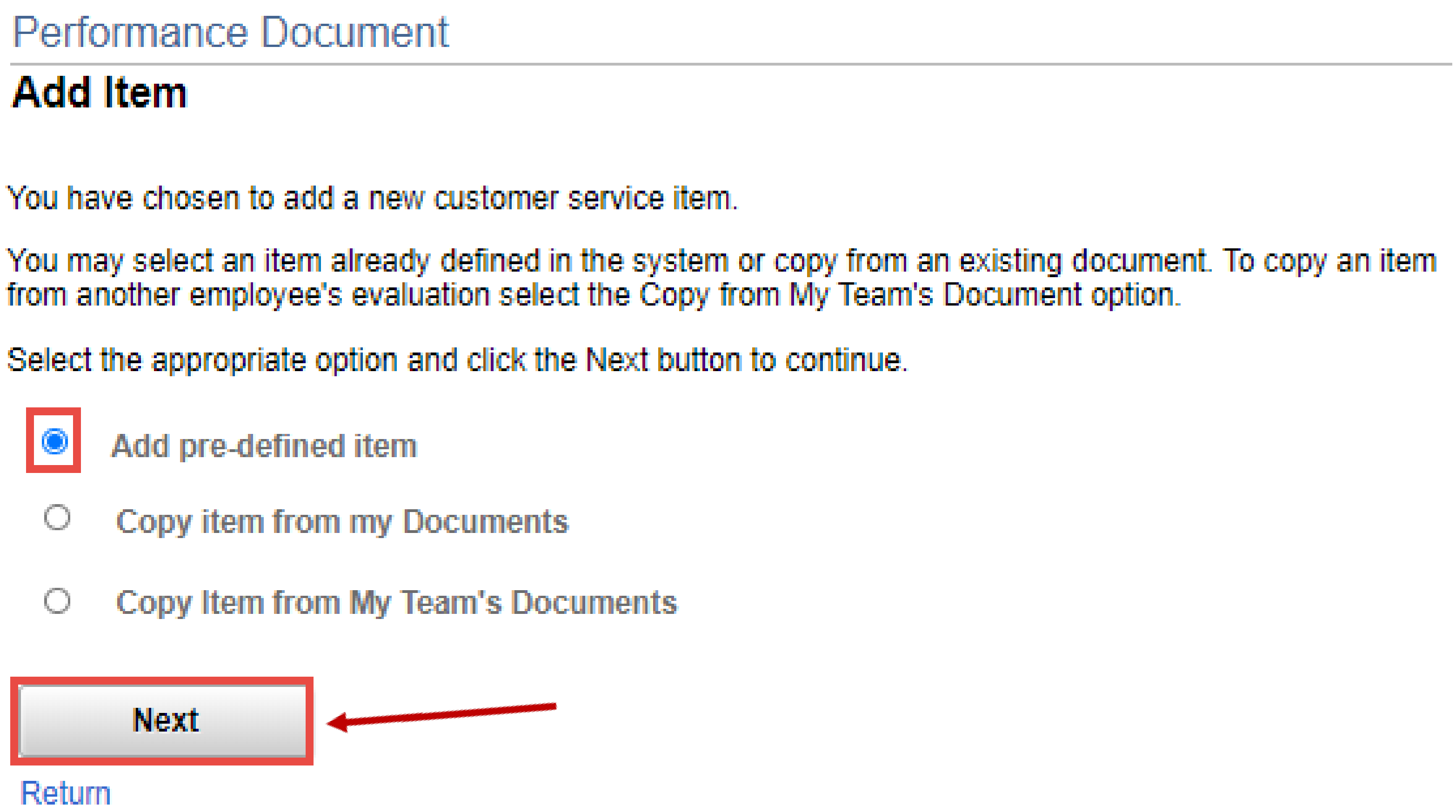


From here, as the manager, you can select to either add a pre-defined customer service item, copy customer service items fromyour own document or copy items from another one of your employee's documents. Please note that in order to copy items from another evaluation (yours or another employee), the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



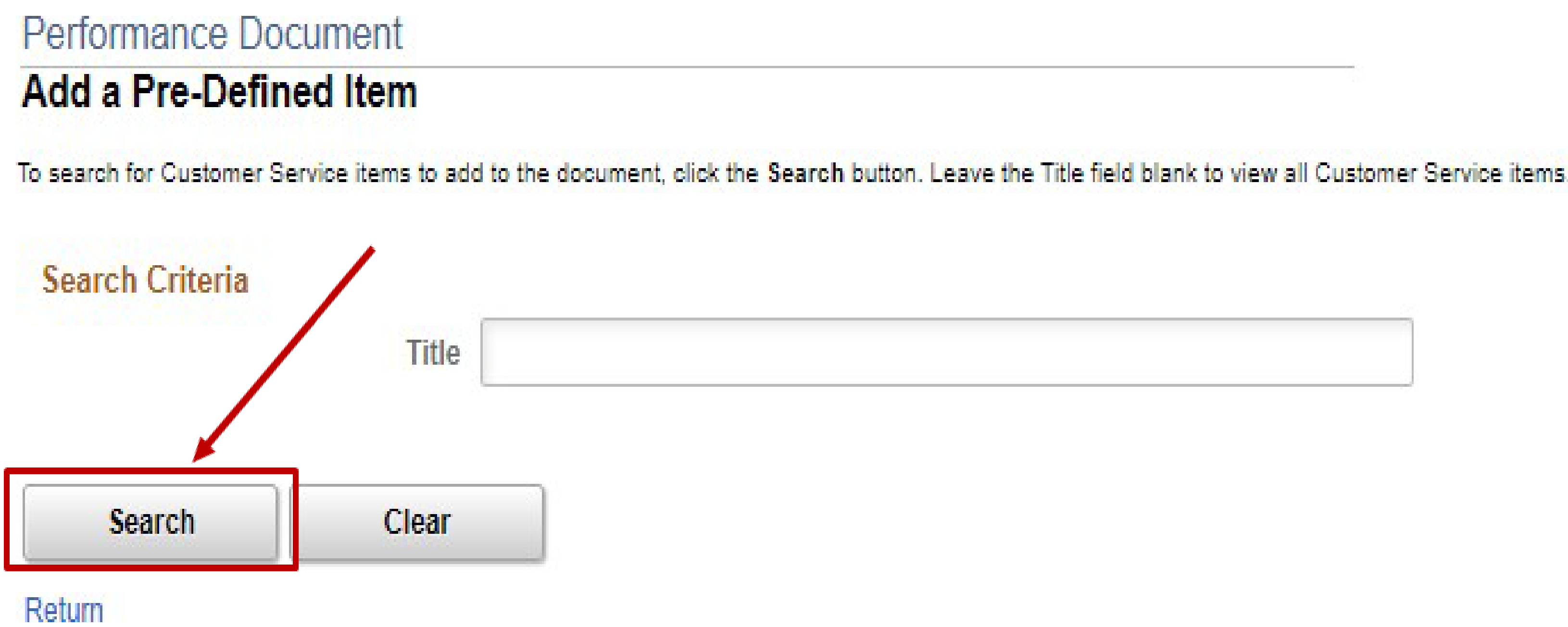
Add a Pre-Defined Customer Service (CS) Measure

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

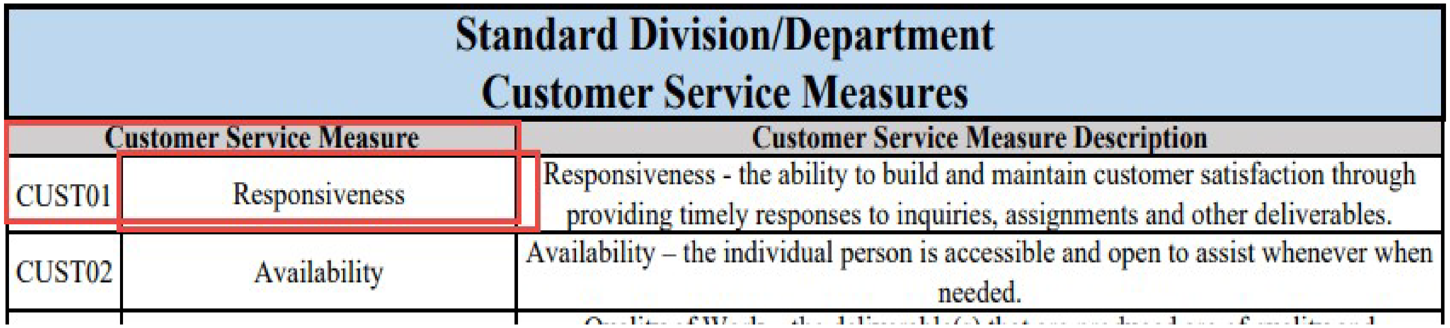


You can search for a pre-defined CS Measure by 1 of 2 ways;

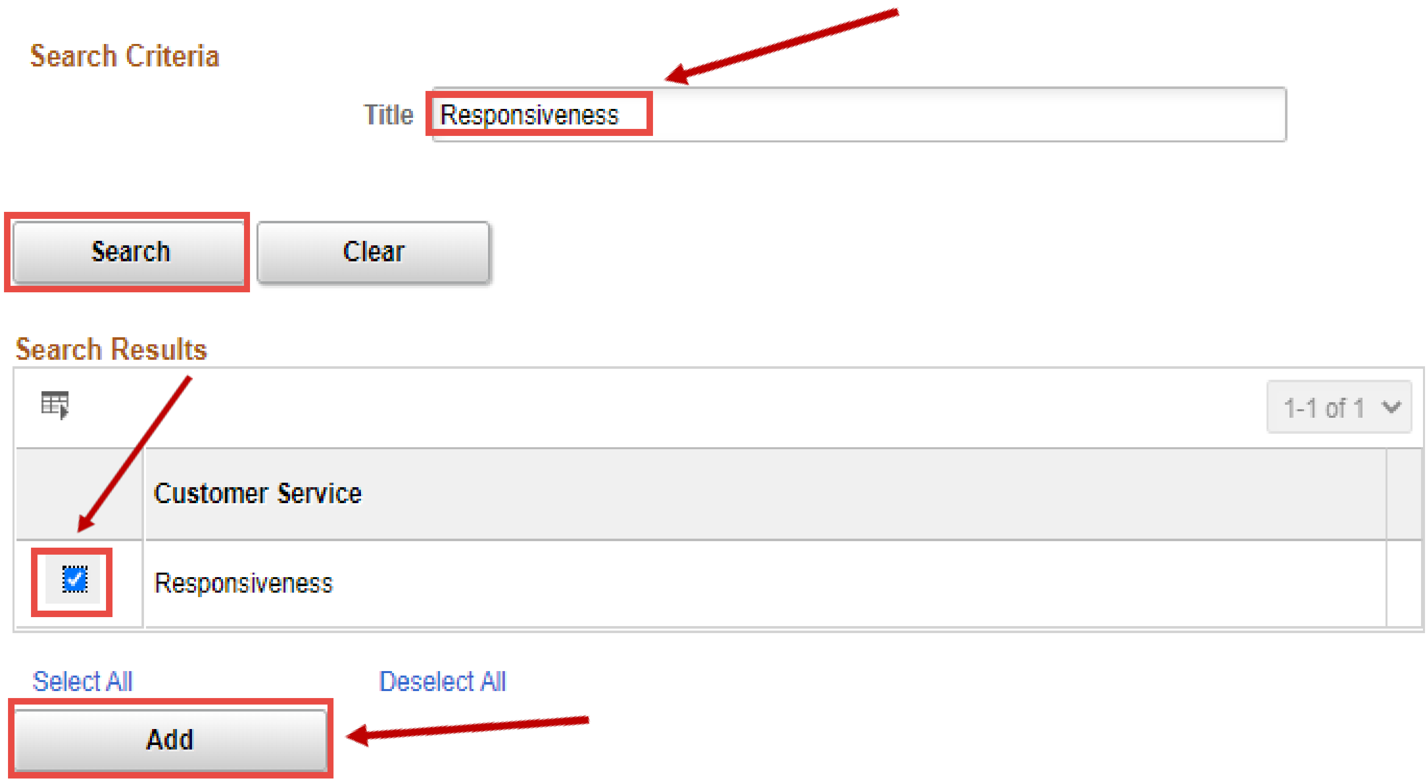
- Enter the CS Measure name from the list
- Click **Search** and a list of the CS Measures will populate.



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**.

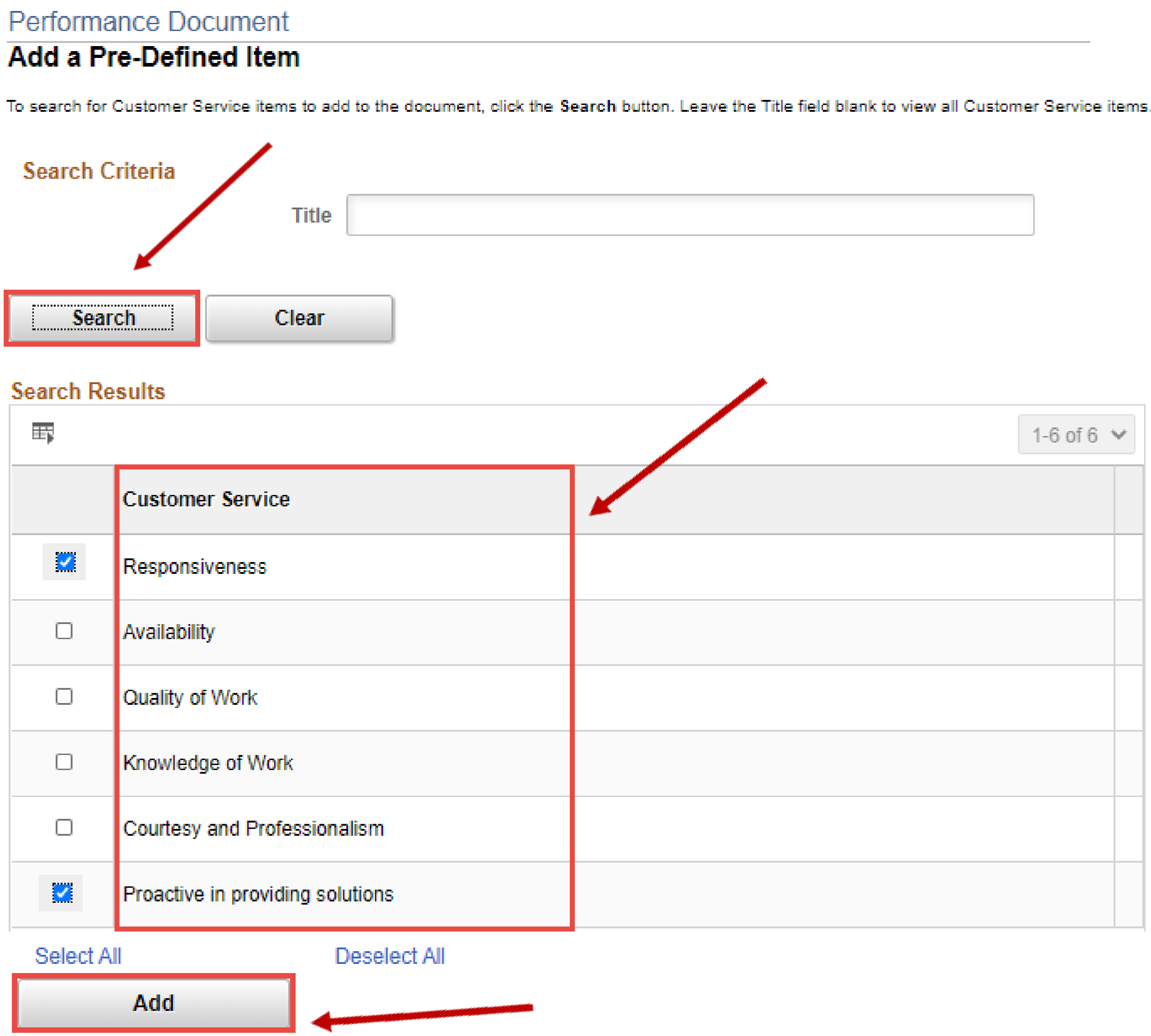


Standard Division/Department Customer Service Measures		
Customer Service Measure		Customer Service Measure Description
CUST01	Responsiveness	Responsiveness - the ability to build and maintain customer satisfaction through providing timely responses to inquiries, assignments and other deliverables.
CUST02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

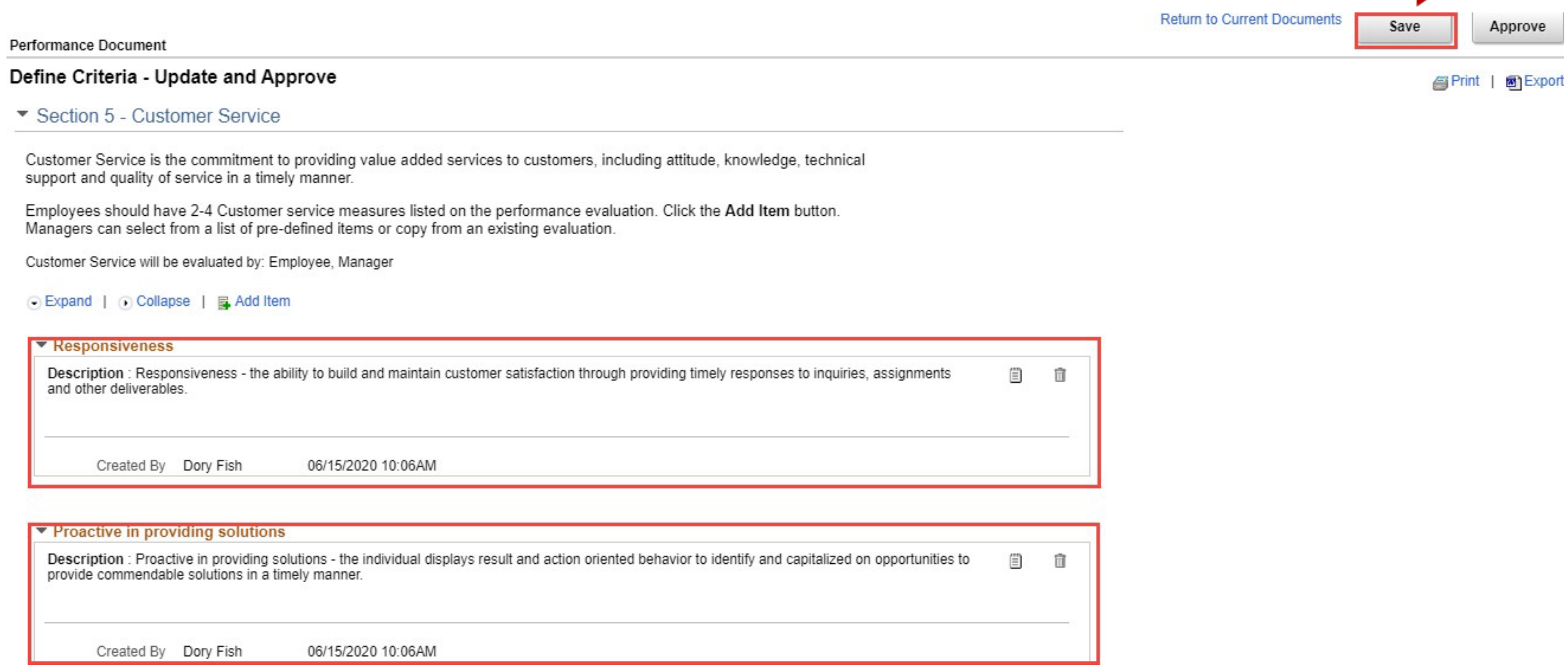


To view the full list of CS Measures, click **Search.**

- 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.**



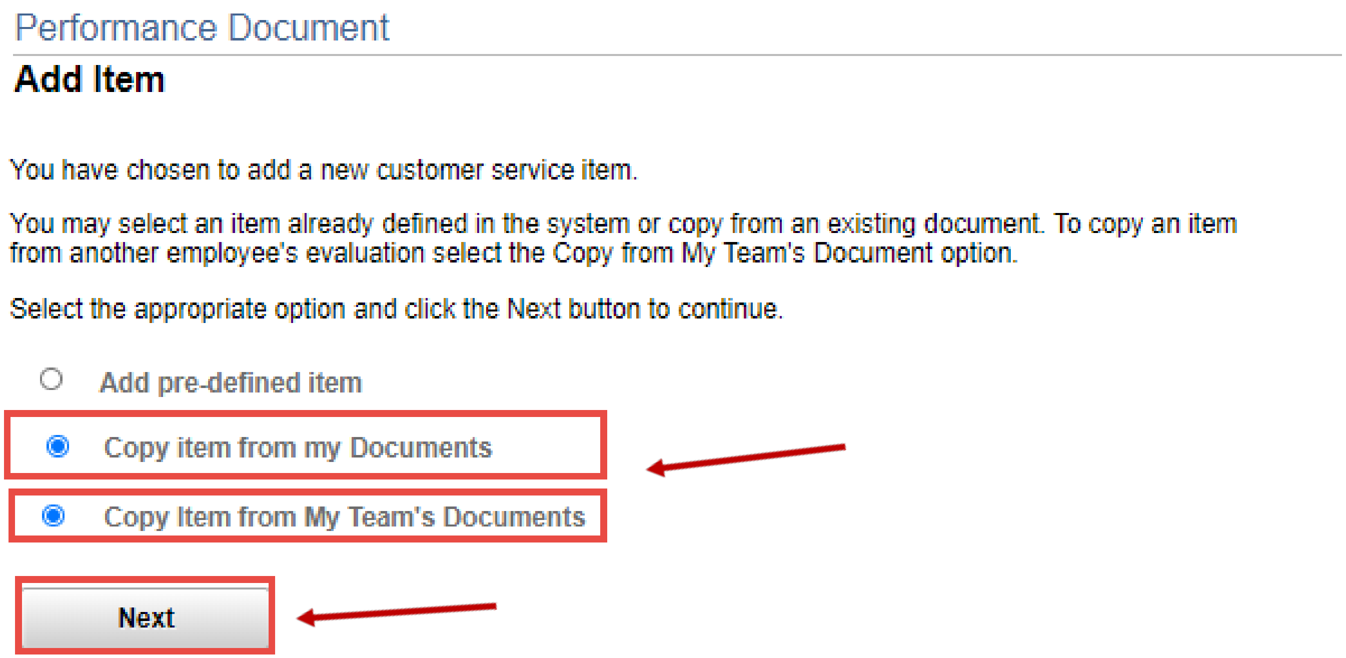
Once added, you'll be re-directed back to your document where the CS Measure will now be added. Don't forget to click **Save** in the top right corner of your document.



To Copy from another Document

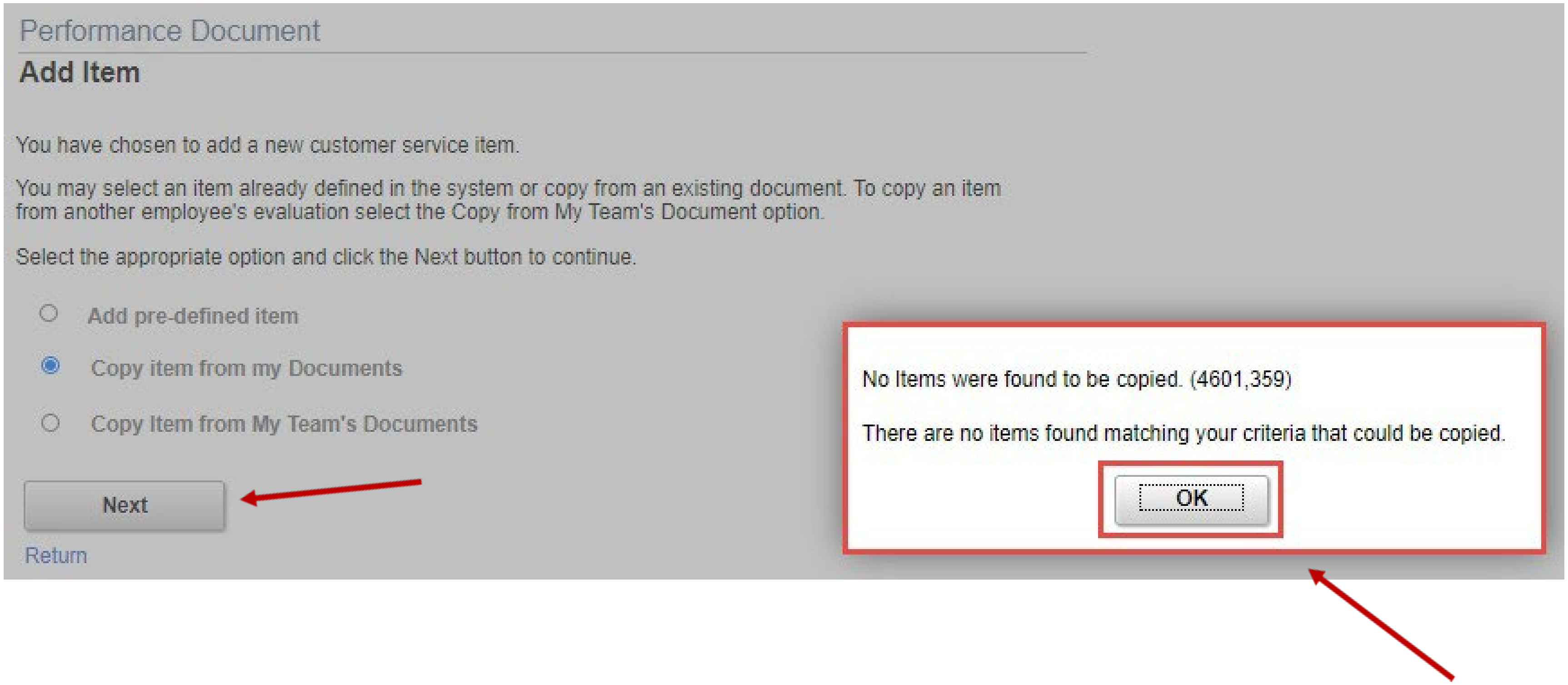
Please note that in order to copy items from another evaluation (yours or another employee), the CS Measures must have already been set.

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



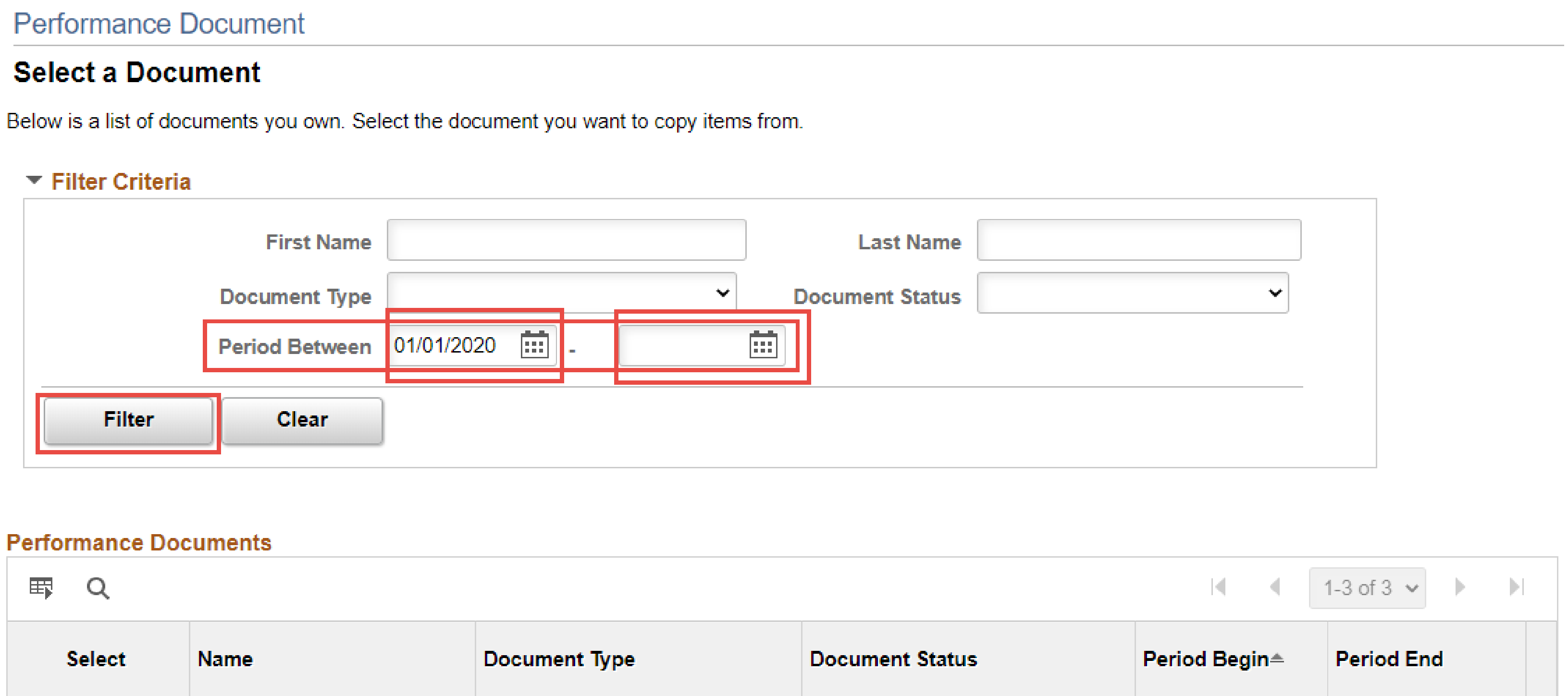
If you try copying items from a document that doesn't already have items established you'll receive a pop-up notification when you select **Next**. Click **OK** on the pop-up and try to copy from a document the other way.

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

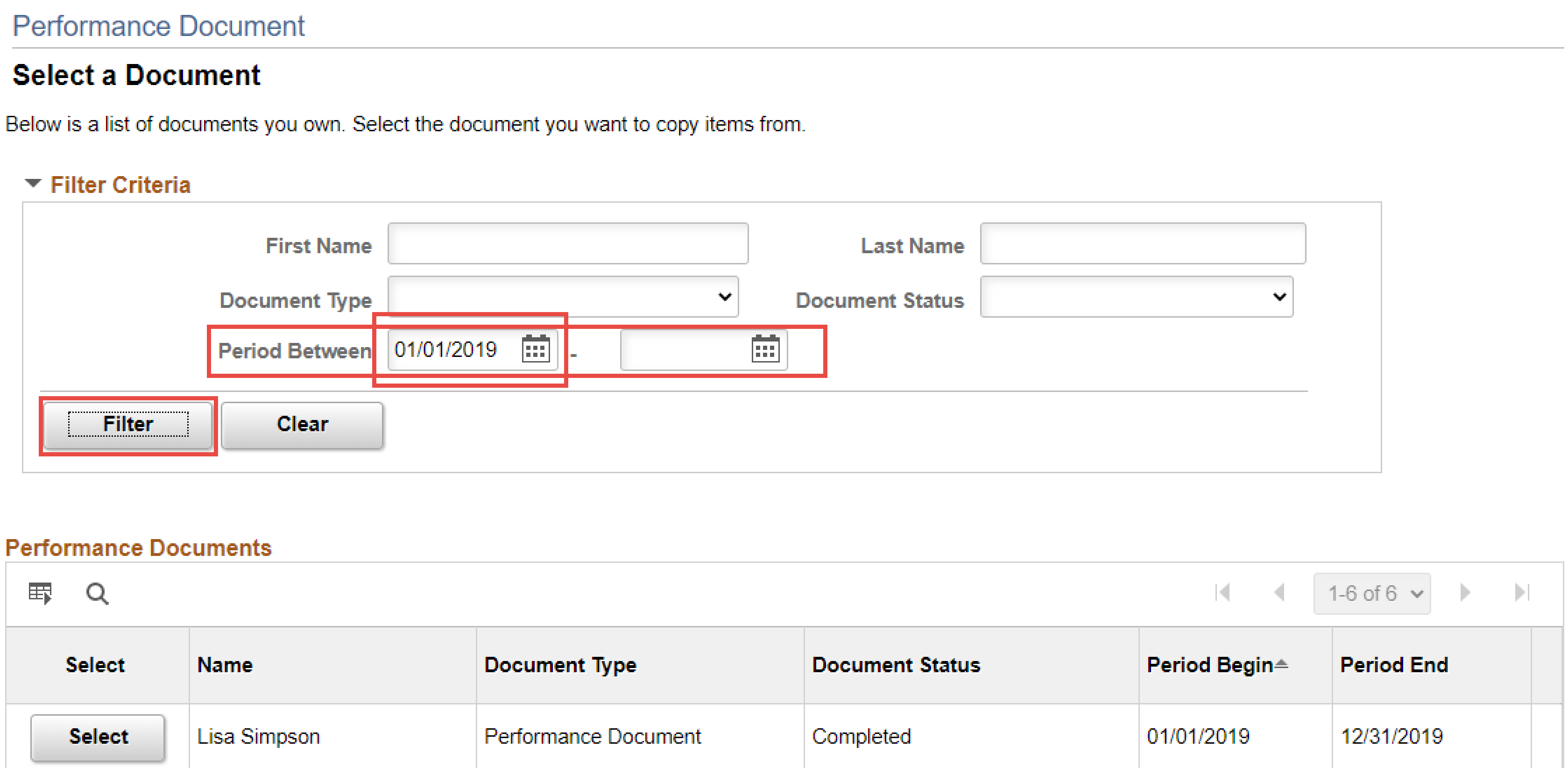


If there are items already set that can be copied, you'll be re-directed to a screen that automatically populates the beginning of the current year (Example: 01/01/2022).

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



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



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

Select	Name	Document Type	Document Status	Period Begin	Period End
Select	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

1-2 of 2

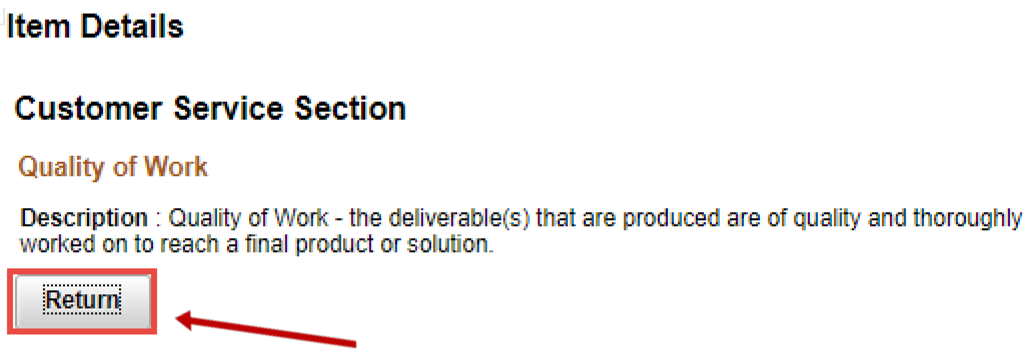
	Customer Service
☐	Quality of Work
☐	Courtesy and Professionalism

Select All Deselect All

Copy Cancel

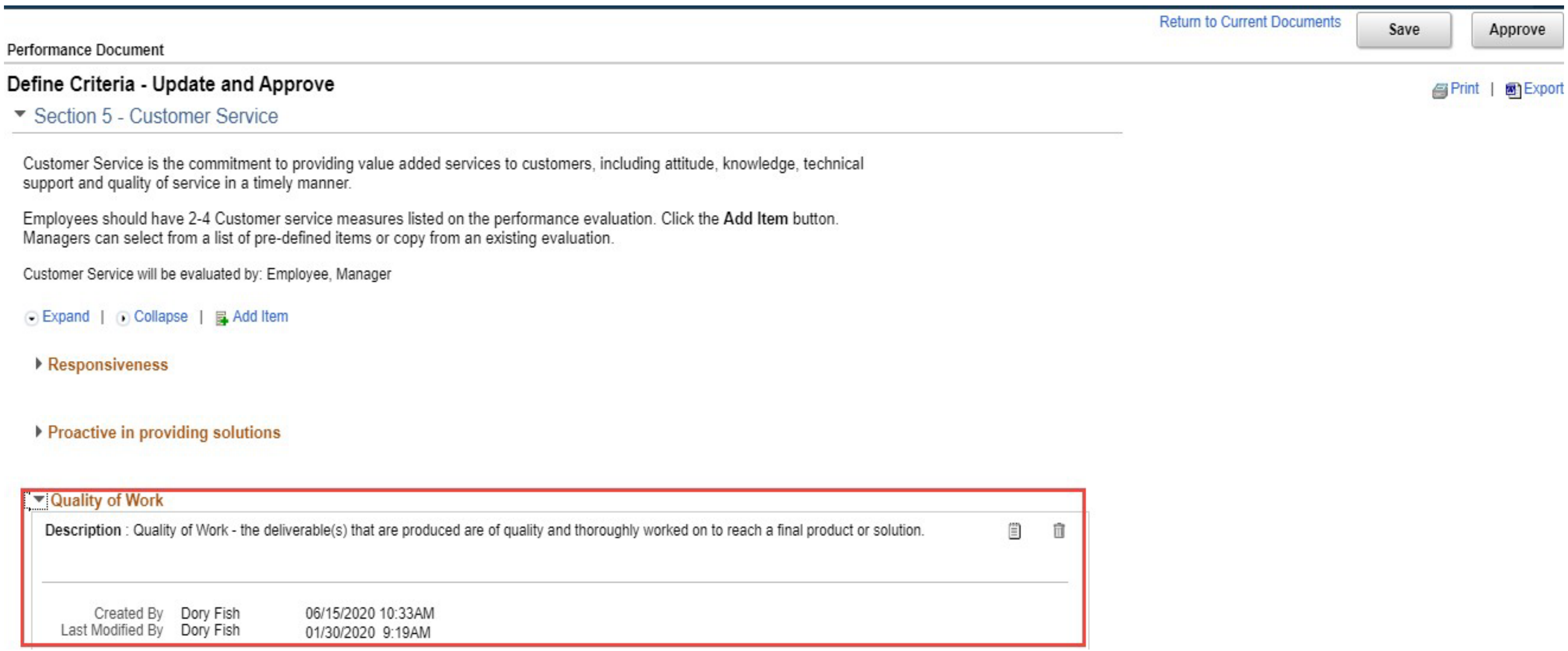
To view the description of an item, select the name hyperlinked in **blue**.

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

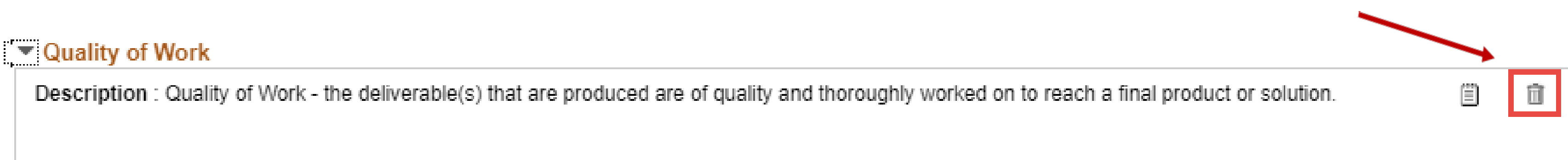


Select **the box to the left** of the populated item and click **Copy.**

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

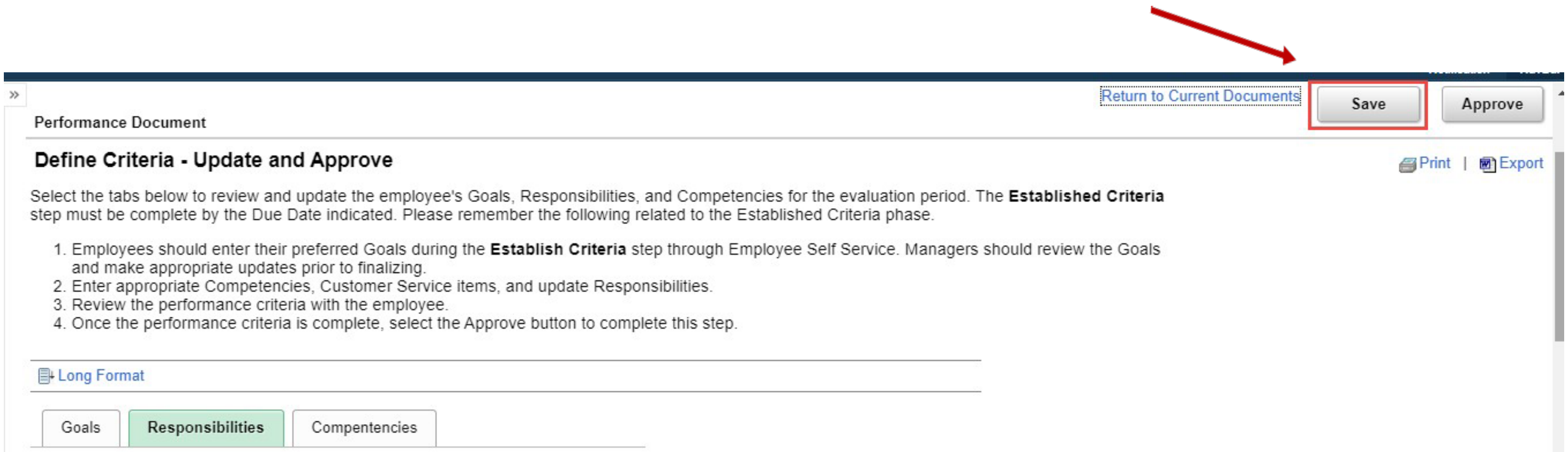


- To ***delete*** the responsibility, select the **trash can icon**.



- 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.



FINALIZE CRITERIA

Now that you've set criteria for your employee you're ready to finalize it. Before finalizing, go through each section to ensurethat 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.

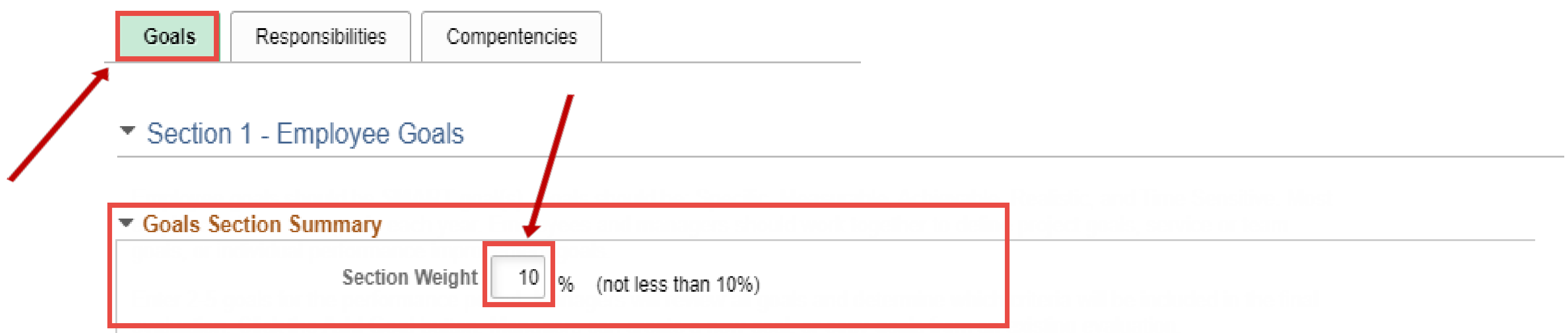
Each section of the document has Section Summaries that include a Section Weight Percentage. These percentages are what determine the overall ePerformance rating for your employee. Each section has a minimum weight that must be assigned, butyou as the Manager can determine how much value a section should 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%

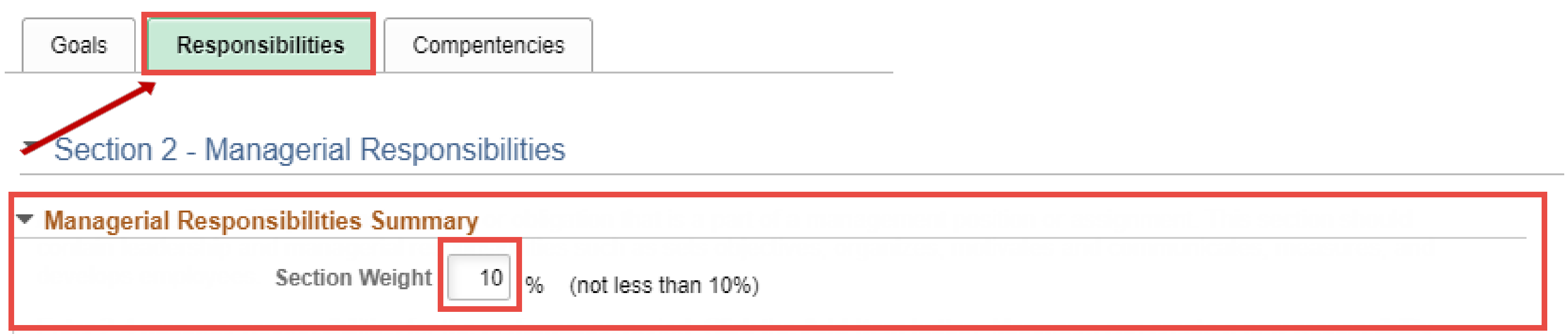
The total overall weight for the document MUST equal 100%. The minimum section weights only account for 70% - 80% (depending on if the document has the additional Managerial Responsibilities section), so as the Manager you will have to assign an additional 20% - 30% weight to the sections. You can assign 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

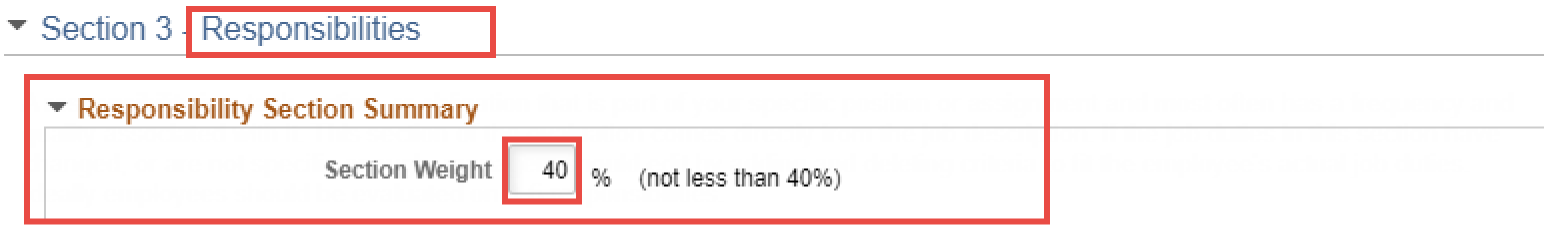
Under **Goals Tab**, scroll down to the Goals Summary Section and update the **Section Weight** to the percentage you want (can’tbe less than 10%).



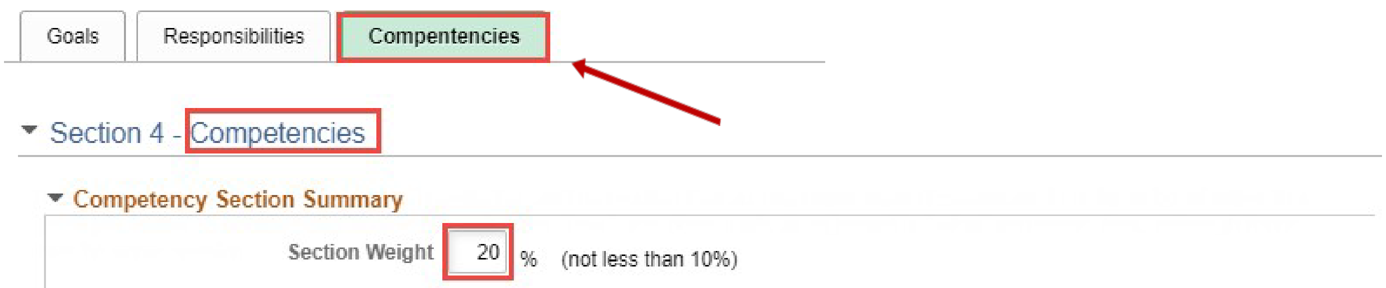
Under **Responsibilities Tab**, scroll down to the Managerial Responsibilities Summary Section and update the **Section Weight** to the percentage you want (can’t be less than 10%). If this section isn’t on the document, skip to the Responsibilities section.



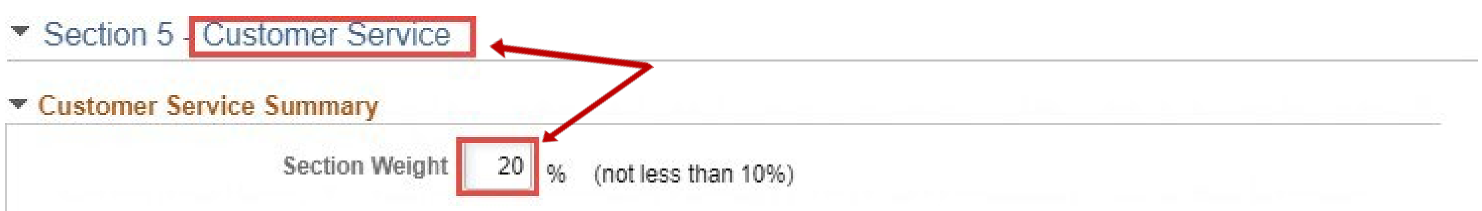
Under **Responsibilities Tab**, scroll down to the Responsibilities Summary Section and update the **Section Weight** to the percentage you want (can't be less than 40%).



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

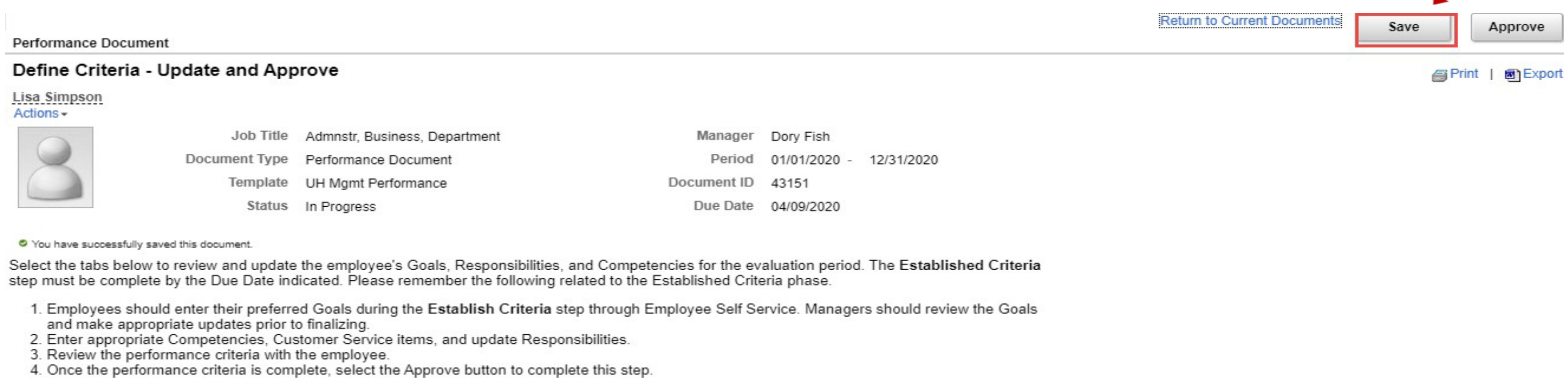


Under the **Competencies Tab**, scroll down to the Customer Service Section and update the Section Weight to the percentage youwant (can't be less than 10%). *(The section weight was changed to 20%)*



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.

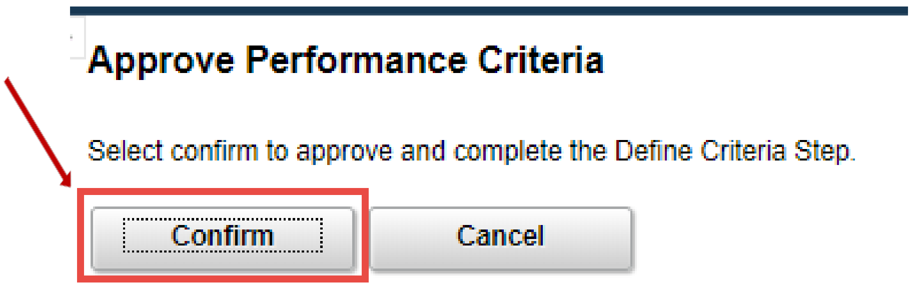
To finalize the criteria, select **Save** on the top right hand of the document.



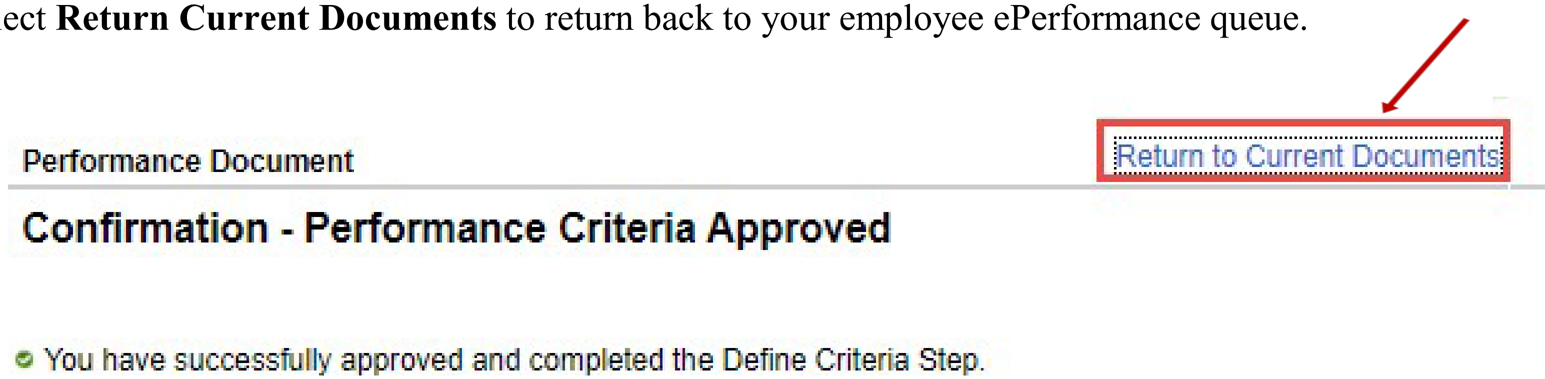
Once you've selected **Save**, select **Approve.** If all of your section weights don't total up to 100%, you'll receive an error message indicating there was a problem completing your request. The error message also includes how much % needs to be adjusted.

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.**

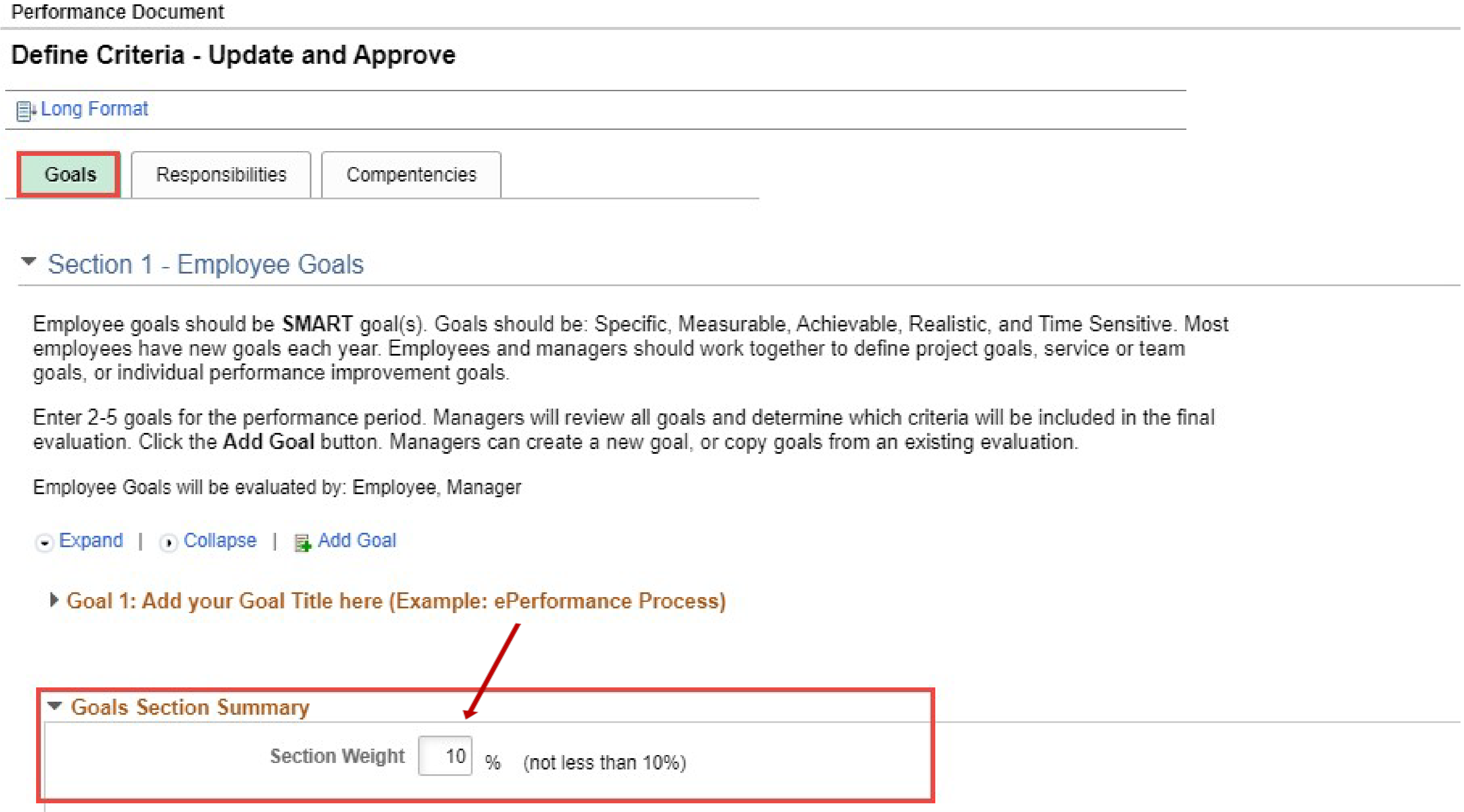


Once confirmed, you'll be redirected to a confirmation page that you've successfully finalized your employee's criteria. Select **Return Current Documents** to return back to your employee ePerformance queue.



Section Weight Screen Shots

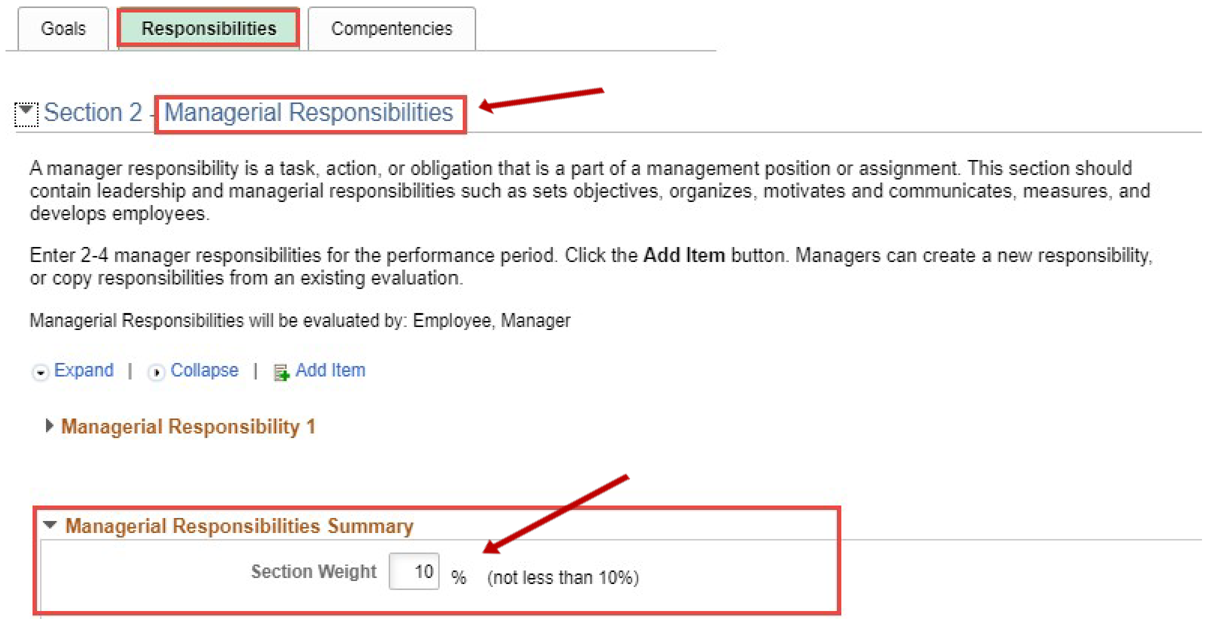
GOALS SECTION -- Minimum 10% *(Section Weight kept at 10%)*



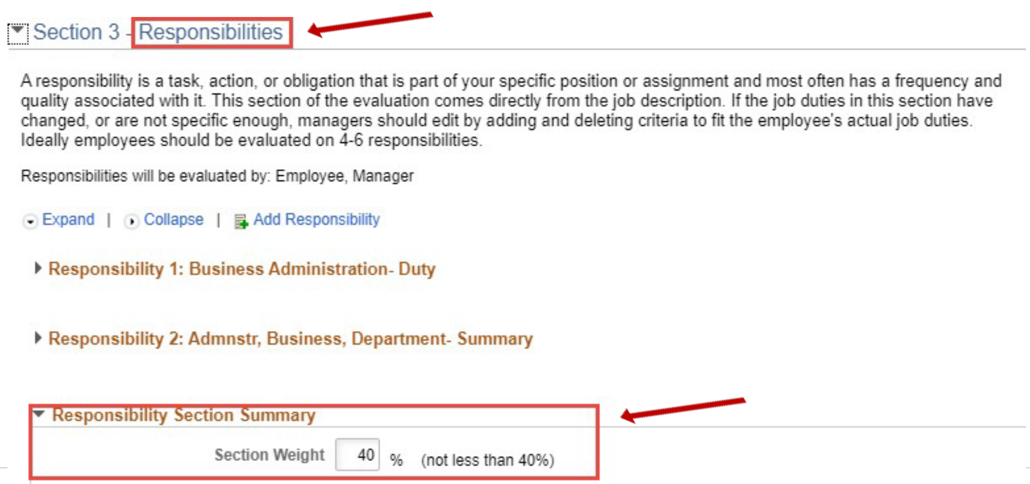
Section Weight Screen Shots

RESPONSIBILITIES SECTIONS:

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

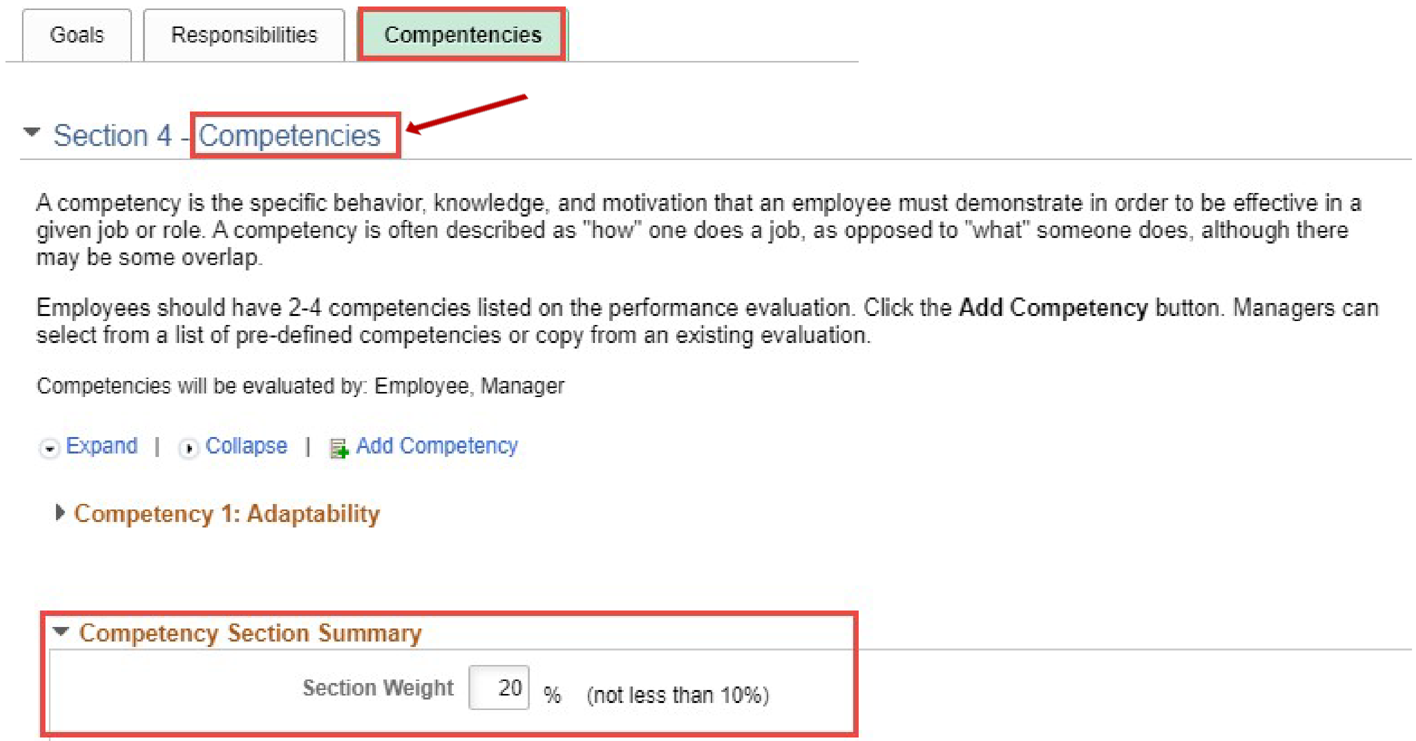


- **Responsibilities – Minimum 40%** *(Section Weight kept at 40%)*



COMPETENCIES SECTIONS:

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



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