

# 2022 Performance Evaluation

---

## MANAGER PROCESS GUIDE

**UH Human Resources - Compensation**



ePerformance – Establishing Criteria

From the PeopleSoft home screen select the ePerformance icon.



The screen will display a list of your current employees performance document.  
 Click on the employees name and their document will open up to begin establishing criteria.

**Manager Self Service** UH ePerformance

Current Documents

- Historical Documents
- Approve Documents
- Maintain Performance Notes
- Transfer Document
- Cancel Document
- Reopen Document

**Current Performance Documents**

Listed are the current performance documents for which you are the Manager.

**Filter Criteria**

**Performance Documents**

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

**ORACLE**

Performance Process

Steps and Tasks

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

Return to Current Documents Save Approve

Print Export

Lisa Simpson Actions

Job Title Admnstr, 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

In the Performance Process section to the left of the screen, select the double arrows to minimize this section.

The screenshot shows the Oracle Performance Process interface. On the left, the 'Performance Process' sidebar is visible, containing a list of steps: 'Establish Performance Criteria' (Due Date: 04/09/2020), 'Update and Approve' (highlighted), 'Review Self Evaluation' (Due Date: 12/09/2020), and 'Complete Manager Evaluation' (Due Date: 02/09/2021). A red box highlights the double arrow icon in the top right corner of the sidebar header. The main content area is titled 'Performance Document' and 'Define Criteria - Update and Approve'. It displays employee information for Lisa Simpson, including her job title 'Admnstr, Business, Department', manager 'Dory Fish', document type 'Performance Document', template 'UH Mgmt Performance', and status 'In Progress'. The evaluation period is from 01/01/2020 to 12/31/2020, and the document ID is 43151. Below the information, there is a list of instructions for the 'Update and Approve' step.

**Performance Process** «

**Performance Document** Return to Current Documents Save Approve

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

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

- 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

**Job Title** Admnstr, 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 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.

The screenshot shows the Oracle Performance Process interface. On the left, the 'Performance Document' sidebar is visible, containing a list of steps: 'Establish Performance Criteria' (Due Date: 04/09/2020), 'Update and Approve' (highlighted), 'Review Self Evaluation' (Due Date: 12/09/2020), and 'Complete Manager Evaluation' (Due Date: 02/09/2021). A red box highlights the double arrow icon in the top right corner of the sidebar header. The main content area is titled 'Performance Document' and 'Define Criteria - Update and Approve'. It displays employee information for Lisa Simpson, including her job title 'Admnstr, Business, Department', manager 'Dory Fish', document type 'Performance Document', template 'UH Mgmt Performance', and status 'In Progress'. The evaluation period is from 01/01/2020 to 12/31/2020, and the document ID is 43151. Below the information, there is a list of instructions for the 'Update and Approve' step.

**Performance Document** Return to Current Documents Save Approve

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

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

- 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

**Job Title** Admnstr, 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 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



### ePERFORMANCE – GOALS

Under the Goals tab select Add Goal

Performance Document

#### Define Criteria - Update and Approve

Lisa Simpson  
Actions ▾



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

Long Format

<b>Goals</b>	Responsibilities	Competencies
--------------	------------------	--------------

## ▼ Section 1 - Employee Goals

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

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

Employee Goals will be evaluated by: Employee, Manager

 Add Goal

### ▼ Goals Section Summary

Section Weight  % (not less than 10%)

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

## 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 employees goal by entering the title, description and employee measurement

## Performance Document

### Add Your Own Goal

\*Title

Description

A rich text editor toolbar for the Description field. It includes icons for undo, redo, font color, font size, bold, italic, underline, bulleted list, numbered list, text color, background color, and a table icon. There are also small icons for copy and paste on the right side.

Employee Measurement

A rich text editor toolbar for the Employee Measurement field, identical to the one for the Description field.

Add

Any goals added should be SMART and must be attainable the end of the year.  
Once you've entered your goals, click Add.

## Performance Document

### Add Your Own Goal

\*Title

Description

Font Size **B** *I* U

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

Font Size **B** *I* U

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.

[Return](#)

This will take you back to your employees document where you will now see your employees goal 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 goals repeat this same process.

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

Define Criteria - Update and Approve Print | Export

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

Once all Goals have been entered, move on to the Responsibilities section.



**University of Houston System**  
**HR-Compensation**

**Responsibilities**

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.

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

Define Criteria - Update and Approve



Document Type Performance Document  
Template UH Mgmt Performance  
Status In Progress

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 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 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

## Managerial Responsibilities Section

This is where you'll set responsibilities directly related to how your employee manages people and/or processes.

- *if your employee has no Managerial Responsibilities section, skip to Responsibilities section starting on page 21.*

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

From here, as the manager, you can select to either add your own item, copy 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 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 screen where you can now add your own item

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.

Once you've established this item select 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 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.

[Return to Current Documents](#) Save Approve

Performance Document

### Define Criteria - Update and Approve

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

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 [Copy](#) [Paste](#) [Edit](#) [Delete](#)

---

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

- 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 [Copy](#) [Paste](#) Edit [Delete](#)

---

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 [Copy](#) [Paste](#) [Edit](#) Delete

---

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 one you're wanting to copy from) 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 no items to copy from you'll receive a pop-up telling you that there are no items to be found. Click OK.

The screenshot shows a web interface for adding a new manager responsibility. The page title is "Performance Document" and the section is "Add Item". The text indicates that the user has chosen to add a new manager responsibility and offers two options: entering a new responsibility or copying from an existing document. The "Copy item from my Documents" option is selected. A "Next" button is visible, along with a "Return" link. A pop-up dialog box is overlaid on the page, displaying the message: "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 dialog is highlighted with a red box.

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 Documents 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](#)

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 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 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	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text"/>	Document Status	<input type="text"/>
Period Between	<input type="text" value="01/01/2020"/>	-	<input type="text"/>
<input type="button" value="Filter"/>	<input type="button" value="Clear"/>		

## Performance Documents

<input type="button" value="List"/>	<input type="button" value="Search"/>				1-3 of 3	<input type="button" value="Next"/>	<input type="button" value="Previous"/>
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	01/01/2019	-	<input type="text" value=""/>

### Performance Documents

Select	Name	Document Type	Document Status	Period Begin <sup>▲</sup>	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 <sup>▲</sup>	Period End
<input type="button" value="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**

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

**Managerial Responsibilities to be copied**

☰ 🔍 1-1 of 1

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

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.

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

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

[Return to Current Documents](#)

Save

Approve

Performance Document

## 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.

The screenshot shows the Oracle HR system interface. At the top, there is a navigation bar with the Oracle logo, a notification icon, and a navigation icon. Below the navigation bar, there is a breadcrumb trail: >> Performance Document. To the right of the breadcrumb trail, there are two buttons: 'Return to Current Documents' and 'Save' (highlighted with a red box). To the right of the 'Save' button is an 'Approve' button. Below the breadcrumb trail, there is a section titled 'Define Criteria - Update and Approve' with a sub-section 'Section 2 - Managerial Responsibilities'. To the right of this section, there are 'Print' and 'Export' icons. The main content area contains a paragraph explaining that a manager responsibility is a task, action, or obligation that is a part of a management position or assignment. It also includes instructions to enter 2-4 manager responsibilities for the performance period and to click the 'Add Item' button. Below this, it states that Managerial Responsibilities will be evaluated by: Employee, Manager. There are three links: 'Expand', 'Collapse', and 'Add Item'. Below the links, there is a section titled 'Managerial Responsibility 1'. At the bottom of the screenshot, there is a section titled 'DBA Leadership' with a description and action icons (print, copy, edit, delete).



### **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.

## To View Responsibilities

Expand the responsibilities by 1 of 2 ways;

- Expand Individual Items – Select the arrow to the right 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

- 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



## To Delete Responsibilities

To delete the responsibility you don't want to keep, 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

Once deleted, you'll be re-directed back to your employees document where the deleted responsibility will be gone.

## 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

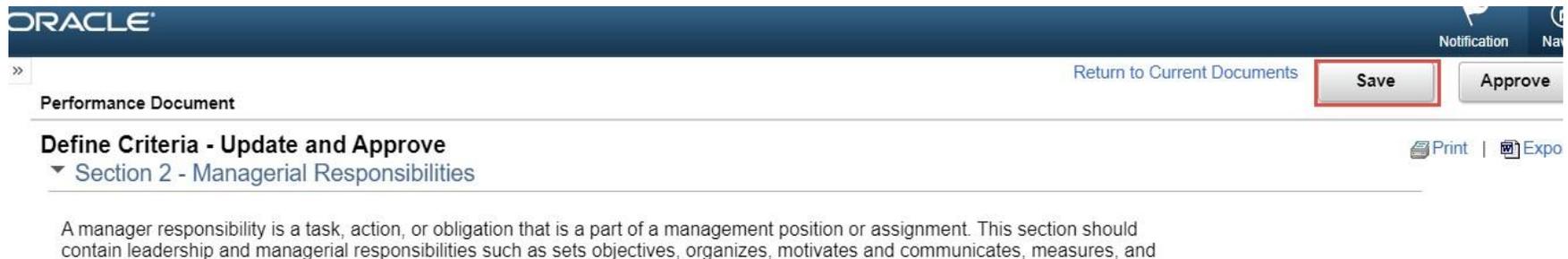
[Expand](#) | [Collapse](#) | [Add Responsibility](#)

### ▼ Responsibility 1: Business Administration - Duty

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

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

Make sure you click Save in the top right hand corner once you've added an item to your employees document. To delete any additional responsibilities repeat this same process.



ORACLE

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

Performance Document

## Define Criteria - Update and Approve

▼ [Section 2 - Managerial Responsibilities](#) [Print](#) | [Expo](#)

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

## To Add Responsibilities

From here, as the manager, you can select to either add your own item, copy 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 Responsibility

You have chosen to add a new 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 responsibility
- Copy responsibility from My Document
- Copy Responsibility from My Team's Documents

Next

[Return](#)

This will take you back to your employee's document where you will now see your employees responsibility displayed. Make sure you click Save in the top right hand corner once you've added an item to your employee's document.

- To *add* additional responsibilities repeat this same process.
- 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 one you're wanting to copy from) and click Next.

### Performance Document

---

#### Add Item

You have chosen to add a new 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 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 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	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text"/>	Document Status	<input type="text"/>
Period Between	<input type="text" value="01/01/2020"/>	-	<input type="text"/>

#### Performance Documents

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

Select	Name	Document Type	Document Status	Period Begin <sup>▲</sup>	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 <sup>▲</sup>	Period End
<input type="button" value="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	Managerial Responsibilities	Content Type	
Begin Date	01/01/2019	End Date	12/31/2019

#### Managerial Responsibilities to be copied

☰ 🔍 1-1 of 1 ▾

	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

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 now be added.

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] [Trash]

---

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] [Trash]

---

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] [Trash]

---

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

- Because the responsibilities 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 employees 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. Below the buttons, the page title is 'Performance Document'. The main heading is 'Define Criteria - Update and Approve'. To the right of the heading are 'Print' and 'Export' icons. The main text reads: '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.' Below this text is a numbered list of four instructions: 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 list is a 'Long Format' link. At the bottom, there are three tabs: 'Goals', 'Responsibilities', and 'Competencies'. The 'Responsibilities' tab is currently selected and highlighted in green.

Once all Responsibilities have been entered, move on 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

 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.

#### 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](#)

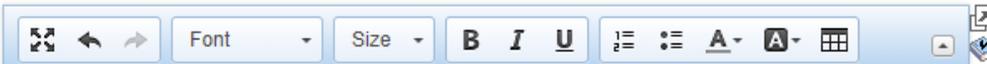
Enter the title and description of the Managerial Responsibility you are establishing. The responsibility set here should be separate from the employees regular responsibilities outlined in the Responsibilities section.

Once you've established this item select Add.

## 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

[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 and 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

Content Group Type

Content Group

### Search Results



1-2 of 2

Competencies



Adaptability

[Select All](#)

[Deselect All](#)

[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**

▼

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

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

Select All

Deselect All

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

Content Group

Search

Clear

### Search Results



1-2 of 2

Competencies



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.

▼ 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](#).*

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

▼ Section 4 - Competencies

▼ Section 5 - Customer Service

## 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.

## 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

#### Search Results

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

[Select All](#)

[Deselect All](#)

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.

## 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

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.

[Return to Current Documents](#)

**Save**

**Approve**

Performance Document

## 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.



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.



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 copy from) 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 software interface for adding items to a performance document. The main window is titled 'Performance Document' and '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'. A 'Next' button is visible at the bottom left. A red-bordered pop-up window is overlaid on the right side, displaying an error message: 'No Items were found to be copied. (4601,359)' and 'There are no items found matching your criteria that could be copied.' with an 'OK' button.

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: 01/01/2020).

- 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	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text"/>	Document Status	<input type="text"/>
Period Between	01/01/2020	-	<input type="text"/>
<input type="button" value="Filter"/>	<input type="button" value="Clear"/>		

#### Performance Documents

				1-3 of 3		
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="v"/>	Document Status	<input type="text" value="v"/>
Period Between	01/01/2019	-	<input type="text" value="v"/>
<input type="button" value="Filter"/>	<input type="button" value="Clear"/>		

#### Performance Documents

Select	Name	Document Type	Document Status	Period Begin <sup>▲</sup>	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 <sup>▲</sup>	Period End
<input type="button" value="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

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

Select All

Deselect All

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

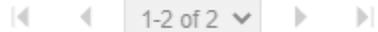
#### Quality of Work

**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

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

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](#)

### 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.

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

Performance Document

### Define Criteria - Update and Approve

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

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



## University of Houston System HR-Compensation

### **ePERFORMANCE – 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 employees Goals).

- **Minimum Section Weights (section screen shots included on pages directly following step by step instructions)**
  - Goals – 40%
  - Managerial Responsibilities – 5% (N/A for employees in Non-Manager roles)
  - Responsibilities – 30%
  - Competencies – 5%
  - Customer Service – 5%

The total overall weight for the document **MUST** equal 100%. The minimum section weights only account for 80% - 85% (depending on if the document has the additional Managerial Responsibilities section), so as the Manager you will have to assign an additional 15% - 20% 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 40%).

Goals Responsibilities Competencies

### ▼ Section 1 - Employee Goals

▼ **Goals Section Summary**

Section Weight  % (not less than 40%)

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 5%). If this section isn't on the document, skip to the Responsibilities section.

Goals Responsibilities Competencies

### ▼ Section 2 - Managerial Responsibilities

▼ **Managerial Responsibilities Summary**

Section Weight  % (not less than 5%)

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 30%).

▼ Section 3 - Responsibilities

▼ Responsibility Section Summary

Section Weight  % (not less than 30%)

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 5%). *(The section weight was kept at 5%)*

Goals

Responsibilities

Competencies

▼ Section 4 - Competencies

▼ Competency Section Summary

Section Weight  % (not less than 5%)

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 5%). *(The section weight was changed to 10%)*

▼ Section 5 - Customer Service

▼ Customer Service Summary

Section Weight  % (not less than 5%)

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

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](#)

---

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

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

 Problem(s) completing your request:  
Please adjust the section weighting by 10%, so that the total section weight adds up to 100%.

[Long Format](#)

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.

**Approve Performance Criteria**

Select confirm to approve and complete the Define Criteria Step.

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

Performance Document

---

**Confirmation - Performance Criteria Approved**

 You have successfully approved and completed the Define Criteria Step.

## Section Weight Screen Shots

### GOALS SECTION – Minimum 40% (*Section Weight kept at 40%*)

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 40%)

## Section Weight Screen Shots

### RESPONSIBILITIES SECTIONS:

- **Managerial Responsibilities – Minimum 5%** (*Section Weight kept at 5%*)

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 5%)

- **Responsibilities – Minimum 30%** (*Section Weight set 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 30%)

## COMPETENCIES SECTIONS:

- **Competencies – Minimum 5%** (*Section Weight kept at 5%*)

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  % (not less than 5%)

- **Customer Service Measures – Minimum 5%** (*Section Weight changed to 10%*)

### ▼ 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  % (not less than 5%)