

# THE MANAGER REVIEW



# Steps for Completing the Manager Review



1

**Access the Appraisal Form**

2

**Rate and enter comments for UHealth Performance Standards**

3

**Rate and enter comments for each Performance Goal**

4

**Print – print now to display both employee and manager entries**

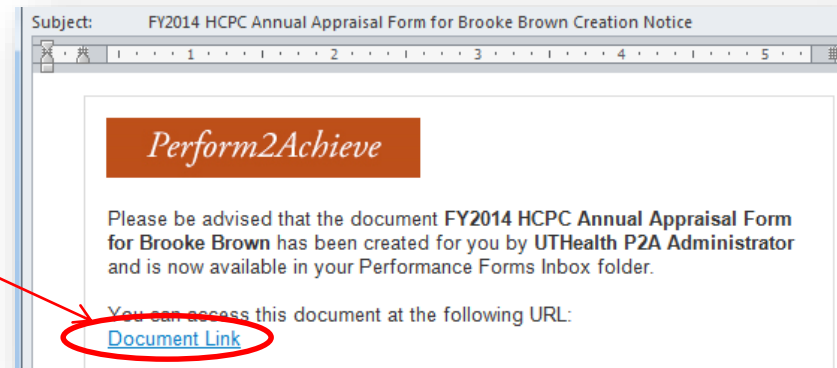
5

**Save and schedule a performance discussion**

# Accessing Appraisal Forms

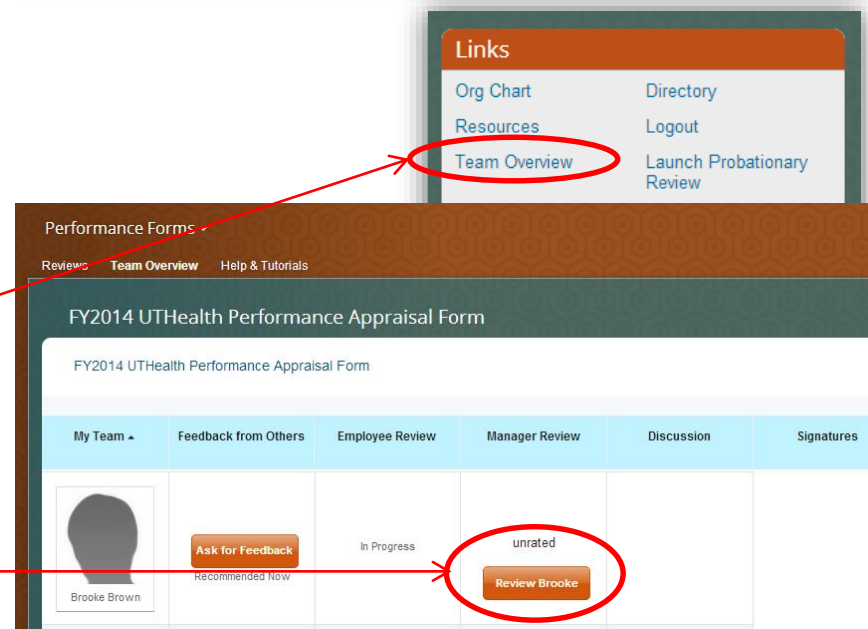
## Method 1

Click on “Document Link” in the launch email notification from your UTHHealth Outlook Inbox.



## Method 2

- Log in to P2A  
<https://go.uth.edu/perform2achieve>
- From “Links”, click on “Team Overview”
- Click on the “Review XX Employee” to open the appraisal form



# UTHealth Performance Standards

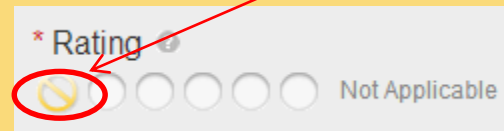
## All Employees


- Exhibits Required Job Knowledge  
(Not Applicable for HCPC)
- Demonstrates Personal Effectiveness and Accountability
- Delivers Quality Student, Patient and Customer Services
- Exhibits Teamwork and Collaboration
- Exemplifies Strong Ethics, Integrity and Respect for Others
- Adheres to All Work Environment, Health, Safety and Compliance Standards

## People Managers Only

- Leads and Develops Others
- Promotes and Values Diversity
- Sets Vision, Strategy and Priorities for Areas of Responsibility

Employees who are not people managers should select a rating of "Not Applicable" for these standards.



\* Rating 

Not Applicable


# Rating and Entering Comments

## UTHealth Performance Standards

UTHealth Performance Standards

Rate each of the UTHealth Performance Standards below. Ratings other than "Fully Meets Expectations" require comments. Hide Instruction

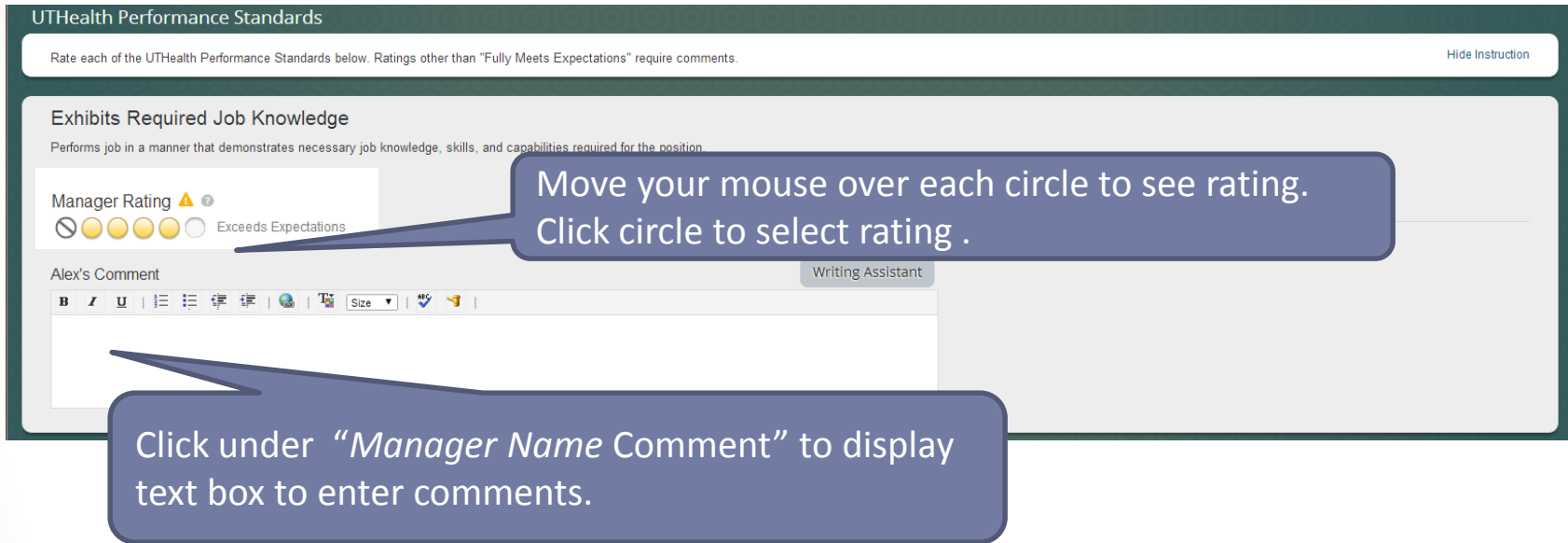
**Exhibits Required Job Knowledge**  
Performs job in a manner that demonstrates necessary job knowledge, skills, and capabilities required for the position.

Manager Rating  Exceeds Expectations

Alex's Comment Writing Assistant

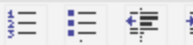





Click under "Manager Name Comment" to display text box to enter comments.

Move your mouse over each circle to see rating. Click circle to select rating.

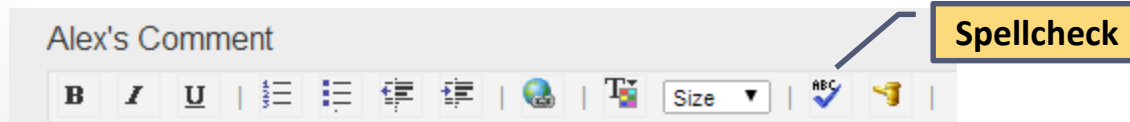


### Text Box Tools:

Alex's Comment

**B** *I* U |  |  |  |  | Size |  

Spellcheck



Note: Comments are required for all ratings except "Fully Meets Expectations"

# Rating and Entering Comments

## Performance Goals

Service Excellence

Increase % of projects completed on time to from 70% to 90 %

CPP Project Database, monthly measure.

Rating

Alex's Comment  
Comments not provided

Completed

Move your mouse over each circle to see rating.  
Click circle to select rating .

Click under "Manager Name Comment" to display text box to enter comments.

Goal Name	Increase % of projects completed on time to from 70% to 90 %.
Measurement	CPP Project Database, monthly measure.
Weight-HCPC Only	-999999.0
Percent Complete	100.0
Start	09/01/2013
Due	08/31/2014
Status	Completed

Note: Comments are required for all ratings except "Fully Meets Expectations"

# Adding Performance Goals

## Sets Vision, Strategy and Priorities for Areas of Responsibility (People Managers Only)

Develops realistic plans, sets goals aligned with priorities, manages resources efficiently, and creates contingency plans. Select "Not Applicable" if the person being evaluated is not a people manager.

\* Rating 

 unrated

Alex's Comment

Comments not provided

Scroll down to the performance goal section and click on "Add Goal"

1

## Performance Goals

 Add Goal

Use this section to rate each performance goal. Performance goals should be aligned to job responsibilities and organizational objectives. Ratings other than "Fully Meets Expectations" require comments. NOTE: Only managers can delete goals. Employees may indicate if a goal is postponed or cancelled by updating the status.

[Hide Instruction](#)

# Adding Performance Goals Continued

**1** Edit your goal below.

Fields marked with \* are required

**2** Category : Service Excellence

**3** \* Goal Name:

**4** \* Measurement:

Weight-HCPC Only: 0.0%

Percent Complete: 0.0%

**5** \* Start: 09/01/2013

**6** \* Due: 08/31/2014

**7** \* Status: Not Started

**8** Milestone:

Comments, Results, Accomplishments or Feedback:

Select goal category

Enter performance goal


Enter how success will be measured

Change start and due dates if needed

Select goal status

Optional: Add tasks to be completed to support goal

Save

**NOTE:**  Comments entered here will NOT appear in the comments section below the goal on the appraisal form.



# Performance Goals

## Editing Goal Details from Appraisal Form

Click on "Edit" at the end of the goal name to display the goal details box.

1

The screenshot shows an appraisal form for 'Service Excellence'. A goal is listed: 'Increase % of projects completed on time to from 70% to 90 %'. An 'Edit' link is at the end of the goal name. To the right, a 'Goal Details' box is open, showing the goal's name, measurement, weight, and completion status. A blue arrow points from the 'Edit' link to the 'Goal Details' box.

Service Excellence

Increase % of projects completed on time to from 70% to 90 %. [Edit](#)

CPP Project Database, monthly measure.

Rating unrated

Alex's Comment  
Comments not provided

### Goal Details

Completed

Goal Name Increase % of projects completed on time to from 70% to 90 %.

Measurement CPP Project Database, monthly measure.

Weight-HCPC Only -999999.0

Percent Complete 100.0

Start 09/01/2013

Due 08/31/2014

Status Completed

Update goal details as needed.

2

The screenshot shows the 'Add Goal' form in a browser window. It contains fields for 'Goal Name', 'Measurement', 'Weight-HCPC Only', 'Percent Complete', 'Start', 'Due', 'Status', and 'Milestone'. There are also 'Back', 'Save Changes', and 'Cancel' buttons at the bottom.

sf Add Goal - Google Chrome

<https://performancemanager4.successfactors.com/tgmEdit?t=3&u=bbbb&editCom>

Add Goal

Edit your goal below.

Fields marked with \* are required.

Category: Service Excellence

\* Goal Name:

\* Measurement:

Weight-HCPC Only: 0.0%

Percent Complete: 0.0%

\* Start: 09/01/2013

\* Due: 08/31/2014

Status: Not Started

Milestone:

Comments, Results, Accomplishments or Feedback:

Click on "Save Changes"

3

# Postponed and/or Cancelled Goals

If a goal on the goal plan is no longer relevant, you can update the **GOAL STATUS** to indicate that the goal was cancelled or postponed.

NOTE: Only managers can delete an employee's goal.

**Goal Details**

sf Add Goal - Google Chrome  
https://performancemanager4.successfactors.com/tgmEdit?t=3&u=bbbb&editCom

Add Goal

Edit your goal below.

Fields marked with \* are required.

Category : Service Excellence

\* Goal Name:

\* Measurement:

Weight-HCPC Only: 0.0%

Percent Complete: 0.0%

\* Start: 09/01/2013

\* Due: 08/31/2014

Status: Not Started

Milestone: Add Tasks

Comments, Results, Accomplishments or Feedback:

Back Save Changes Cancel

## Goal Status Options

Not Started

Behind/At Risk

On Track

Completed

Postponed

Cancelled

# Printing the Appraisal Form

The image shows two screenshots from the Perform2Achieve system. The top screenshot shows the system's navigation bar with a search box and a print icon circled in red, with a yellow starburst labeled '1' next to it. The bottom screenshot shows the appraisal form page for Brooke Brown, with the 'Print' button at the top circled in red and a yellow starburst labeled '2' next to it. The form content includes sections for 'Introduction', 'UTHealth Performance Standards (40%)', and three performance categories: 'Demonstrates Personal Effectiveness and Accountability', 'Delivers Quality Student, Patient and Customer Services', and 'Exhibits Teamwork and Collaboration'. Each category has a rating scale and a comment field.

With the form open:

1. Click on the Print Icon
2. Click on the Print button at the top of the form

# Printing the Appraisal Form Continued

3. Select printer

4. Set print options

5. Click "Print"

The image shows a printing dialog box on the left and an appraisal form on the right. The dialog box has several sections with yellow callouts:

- Callout 3:** Points to the printer selection area, showing "Destination: HP LaserJet Profession..." and a "Change..." button.
- Callout 4:** Points to the "Pages" section, which includes radio buttons for "All" and "e.g. 1-5, 8, 11-13", a "Copies" field set to 1, and "Layout" options for "Portrait" and "Landscape".
- Callout 5:** Points to the "Print" button in the top right of the dialog box.

The appraisal form on the right is titled "FY2014 Annual Appraisal Form: Brooke Brown". It includes an "Introduction" section with a "Rating Scale" ranging from 1.0 (Unsatisfactory) to 5.0 (Exceptional). Below this are several performance standards, each with a description and a "Rating" section. The standards listed are:

- Demonstrates Personal Effectiveness and Accountability:** 12.5% of total score. Rating: 5 (Exceeds Expectations).
- Delivers Quality Student, Patient and Customer Services:** 12.5% of total score. Rating: 1 (unrated).
- Exhibits Teamwork and Collaboration:** 12.5% of total score. Rating: 1 (unrated).
- Exemplifies Strong Ethics, Integrity and Respect for Others:** 12.5% of total score. Rating: 1 (unrated).
- Adheres to All Work Environment, Health, Safety and Compliance:** 12.5% of total score. Rating: 1 (unrated).

The form also includes a "Brooke's Comment" section for each standard, with "Comments not provided" for all listed.

# Scheduling the Performance Discussion

Once you have rated and entered comments for each UTHealth Performance Standard and Performance Goal and selected the overall performance rating, schedule a performance discussion with your employee. After the discussion, click the button in the bottom right.

FY2016 UTHealth Performance Appraisal Form for Brooke Brown

Changes saved.

Fully Meets Expectations \* 0

Alex's Comment  
Comments not provided

Comments not provided

Employee Summary of Overall Performance

This section may be used to summarize performance and include additional accomplishments.

Employee Summary of Overall Performance Section Overall Comment

Alex's Comment  
Comments not provided

Brooke's Comment  
I enjoy working at UTHealth.

Manager Summary of Overall Performance

Use this section to summarize the employee's overall performance during the review period. This section may be used to describe the employee's strengths and opportunities.

\* Manager Rating

Fully Meets Expectations

Alex's Comment

You are a great team player. Thank you for all that you do.

Save and Finish Later

Reviewed with employee. Send to employee for signature.