

# Launching and Completing Probationary Reviews

## Purpose

This job aid provides information about UTHealth’s probationary review process and explains how to launch and complete probationary reviews in Perform2Achieve (P2A).

## Table of Contents

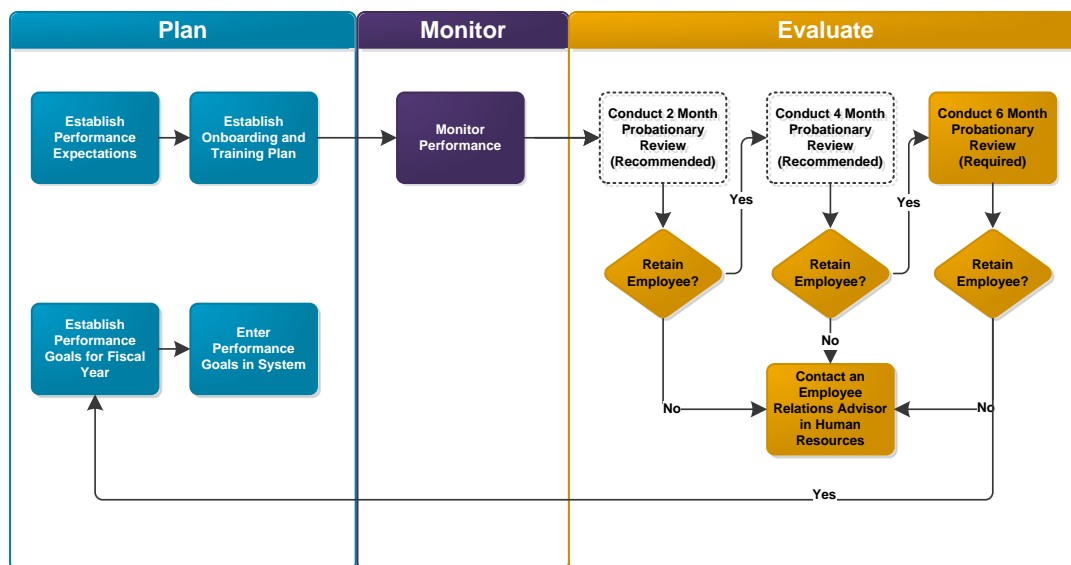
- UTHealth Probationary Reviews
- Probationary Review Processes
- Accessing Perform2Achieve
- Steps in the Probationary Review Process Using Perform2Achieve

## UTHealth Probationary Reviews

All new classified employees and classified employees who transfer to a position in another department are subject to a six month probationary period.

It is recommended that employees are reviewed during their probationary period at 2, 4, and 6 months from their hire date or date of transfer.

## Probationary Review Process



# Launching and Completing Probationary Reviews

## Accessing Perform2Achieve

1. Go to <https://go.uth.edu/perform2achieve>
2. Enter your UTHealth username and password

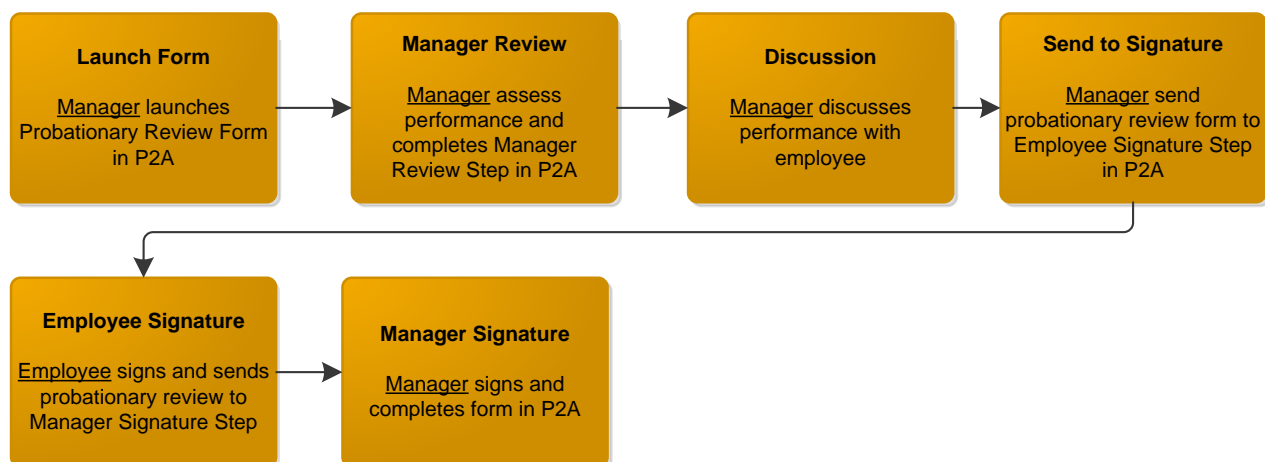


**Web Browser:** Google Chrome is the recommended web browser to use for accessing Perform2Achieve.

## Steps in the Probationary Review Process using Perform2Achieve

Below are the steps required to complete the probationary review process using Perform2Achieve.

Steps in the Probationary Review Process	
1.	<b>Manager</b> launches probationary review form in P2A
2.	Manager assesses employee's performance and completes the manager review in P2A
3.	Manager discusses performance with employee
4.	Manager sends probationary review form to employee signature step in P2A
5.	Employee signs and sends probationary review form to manager signature step in P2A
6.	Manager signs probationary review form in P2A to complete the review



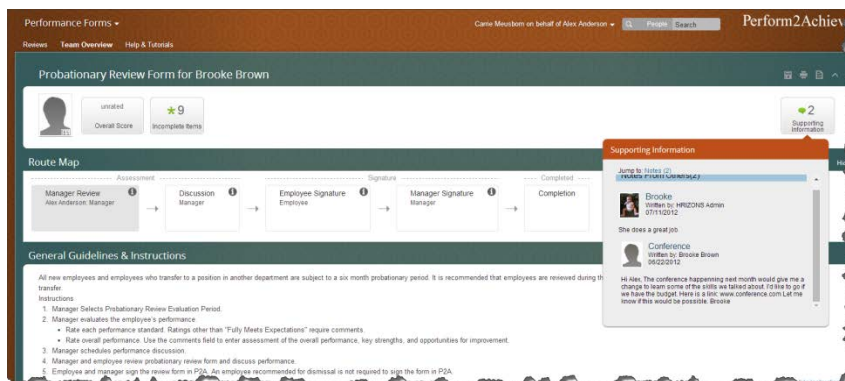
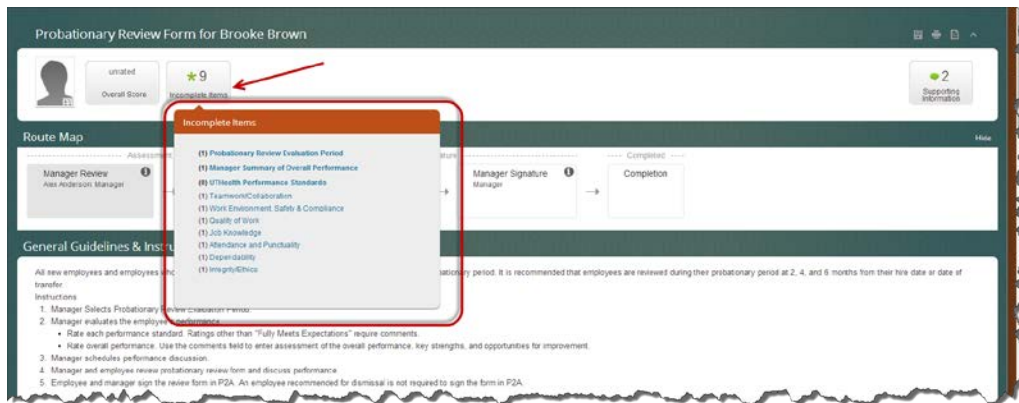
# Launching and Completing Probationary Reviews

## UTHealth Probationary Review Form

The probationary review form is comprised of the following sections:

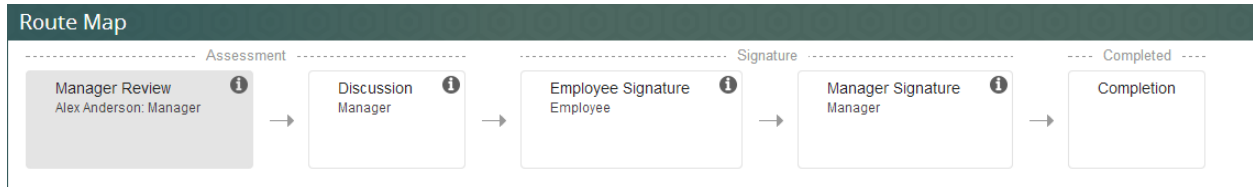
1. Information Bar
2. Route Map
3. General Guidelines and Instructions
4. Probationary Review Evaluation Period
5. UTHealth Performance Standards
6. Manager Summary of Overall Performance

### Information Bar



# Launching and Completing Probationary Reviews

## Route Map



## General Guidelines & Instructions

**General Guidelines & Instructions**

All new employees and employees who transfer to a position in another department are subject to a six month probationary period. It is recommended that employees are reviewed during their probationary period at 2, 4, and 6 months from their hire date or date of transfer.

**Instructions:**

1. Manager Selects Probationary Review Evaluation Period.
2. Manager evaluates the employee's performance.
  - Rate each performance standard. Ratings other than "Fully Meets Expectations" require comments.
  - Rate overall performance. Use the comments field to enter assessment of the overall performance, key strengths, and opportunities for improvement.
3. Manager schedules performance discussion.
4. Manager and employee review probationary review form and discuss performance.
5. Employee and manager sign the review form in P2A. An employee recommended for dismissal is not required to sign the form in P2A.

[Hide Instruction](#)

## Probationary Review Evaluation Period

**Probationary Review Evaluation Period**

Select the evaluation period for this probationary review using the drop-down list below.

\* Probationary Review Evaluation Period

## UTHealth Performance Standards

**UTHealth Performance Standards**

Rate the employee on each of the UTHealth performance standards below. Ratings other than "Fully Meets Expectations" require comments. [Hide Instruction](#)

**Quality of Work**  
Delivers a high quality of work that is timely, accurate and thorough.

\* Rating       unrated

Alex's Comment  
Comments not provided

**Job Knowledge**  
Has and demonstrates the required knowledge, skills and capabilities to accomplish tasks and meet objectives.

\* Rating       unrated

Alex's Comment  
Comments not provided



# Launching and Completing Probationary Reviews

## Manager Summary of Overall Performance

Manager Summary of Overall Performance

Use this section to summarize and rate the employee's overall performance.

If dismissal is recommended, contact an Employee Relations Advisor within the Human Resources Department at (713) 500-3130 prior to your discussion with the employee.

\* Manager Rating  

unrated

Alex's Comment  
Comments not provided

Save and Finish Later    Send to Discussion

\* To finalize, please complete 7 missed fields

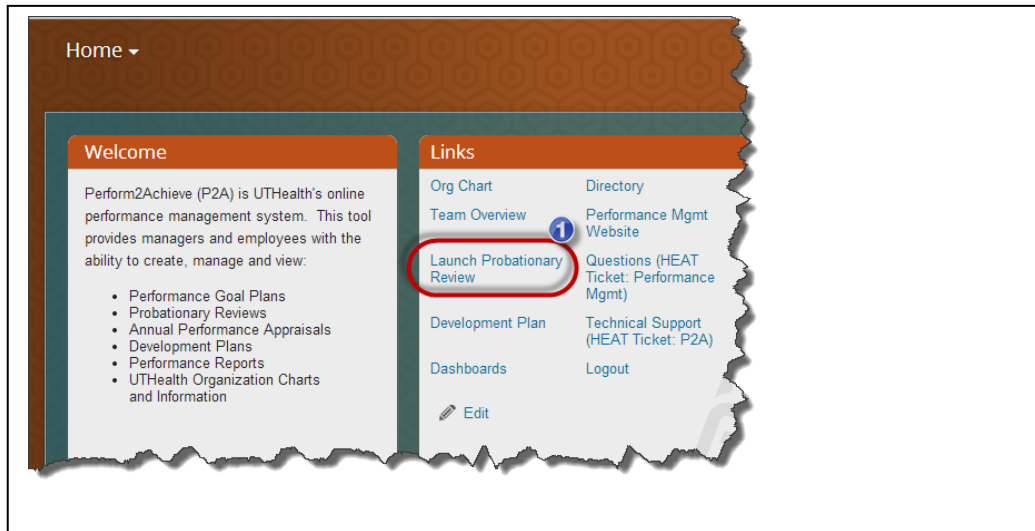
# Launching and Completing Probationary Reviews

## Launching a Probationary Review Form

1. From the **Links** section on the P2A home page, click on **Launch Probationary Review**



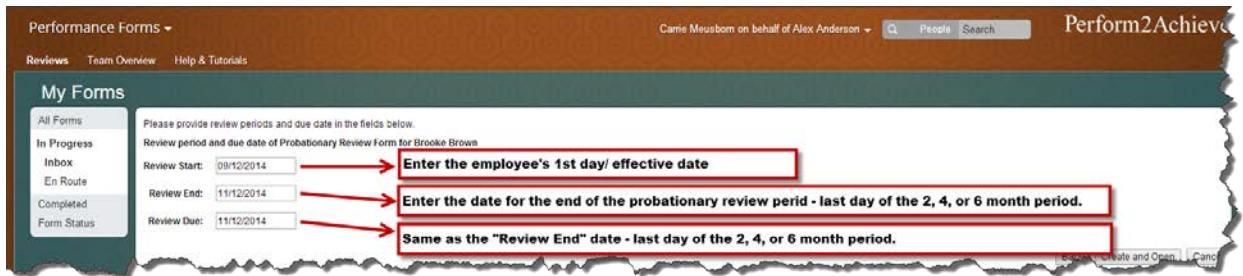
If you do not see **Launch Probationary Review** in the **Links** section, click on **Edit** in the **Links** section and then select the check box next to Launch Probationary Review.



2. Click on the name of the employee for whom you are launching the probationary review form.

# Launching and Completing Probationary Reviews

3. Enter the probationary review form
  - **Review Start** date
  - **Review End** date
  - **Review Due** date



4. Click on the **Create and Open** button.



# Launching and Completing Probationary Reviews

## Completing the Manager Review

### Steps in Completing the Manager Review

1. Select the evaluation period for the probationary review.

2 month evaluation
4 month evaluation
6 month evaluation
Other

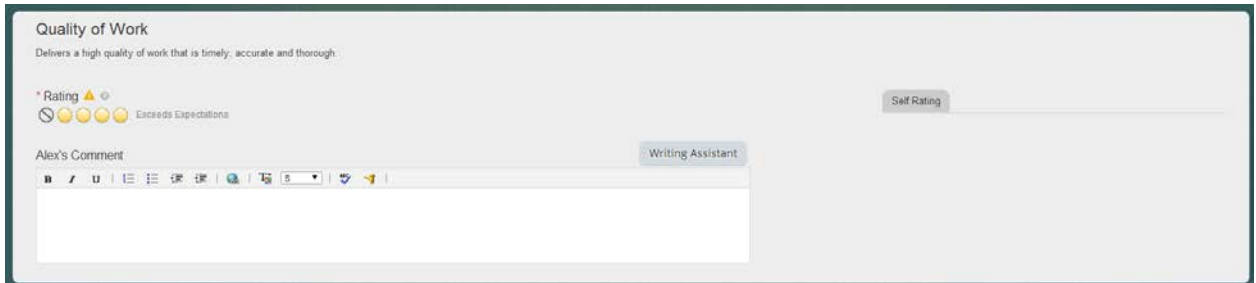


2. Rate the employee on each of the performance standards. Ratings other than “Fully Meets Expectations” require comments.

Quality of Work	Delivers a high quality of work that is timely, accurate and thorough.
Job Knowledge	Has and demonstrates the required knowledge, skills and capabilities to accomplish tasks and meet objectives.
Dependability	Meets deadlines and standards for quality and quantity of work within area of responsibility. Is reliable and makes effective use of resources.
Integrity/Ethics	Builds trust. Model of principled, ethical, and values-orientated behavior.
Teamwork/Collaboration	Demonstrates willingness to assist colleagues with various projects/tasks. (Assigned or unassigned). Listens to others and values opinions; works effectively and cooperatively with others.
Attendance and Punctuality	Reports to work on time. Gives prompt notice of absence.
Work Environment, Safety & Compliance	Completes all mandatory safety and compliance training by required deadlines. Adheres to safety rules, and compliance/HOOP standards and policies.



# Launching and Completing Probationary Reviews



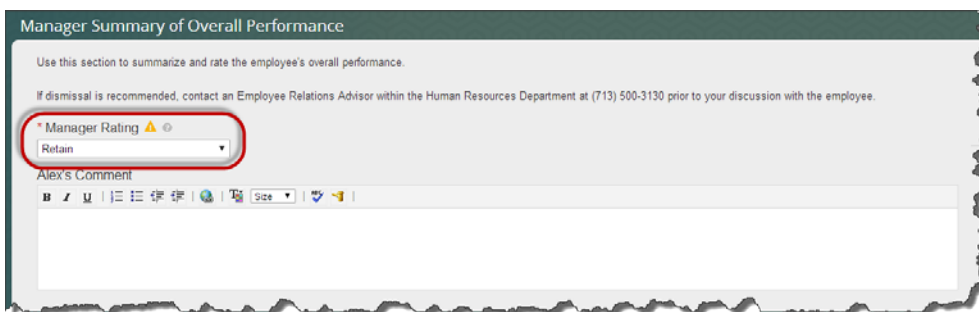
## Selecting a Rating

- Move your mouse over the circles below “Rating” to display the rating. Click on the appropriate circle to select the rating.
- Not Applicable – if an item is not applicable, click on the circle with the line through it

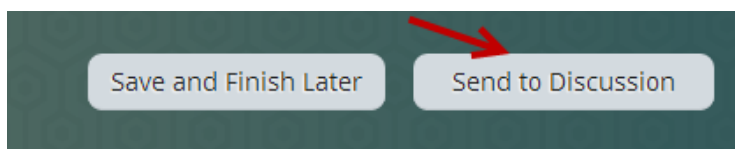
## Entering Comments

- Click below where it says “Employee’s Name Comment” to display the comments box
- Click on the Writing Assistant tab for helpful suggestions if desired

3. Select the overall performance rating and enter comments.



4. When finished rating each item and entering all comments, click on the **Send to Discussion** button.

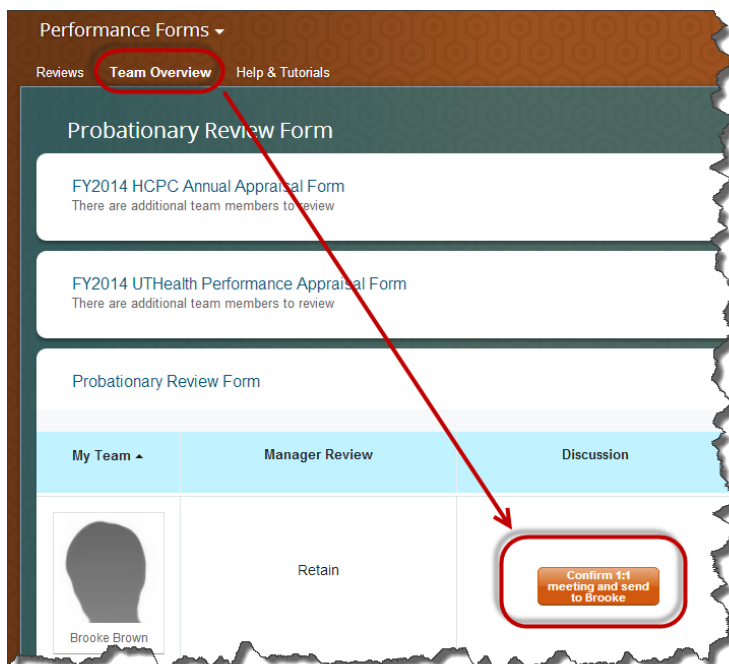


Note: If you need to exit and return to the form at a later date to complete, click on the **Save and Finish Later** button.

## Sending the Probationary Review to the Employee Signature Step

After the discussion, the manager will need to log in to P2A and move the form from the Discussion step to the Employee Signature step. The employee will receive an email notification that the form is ready for their signature.

- From the P2A home page, in the “Links” section, click on **Team Overview**.
- Click on the **“Confirm 1:1 meeting and send to Brooke”**



## Launching and Completing Probationary Reviews

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### Completing the Probationary Review

Managers will receive an email after the employee has signed the form. To complete the form, Managers will need to log in to P2A and click on Manager Signature from the “To Do” section on the P2A home page.

