

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

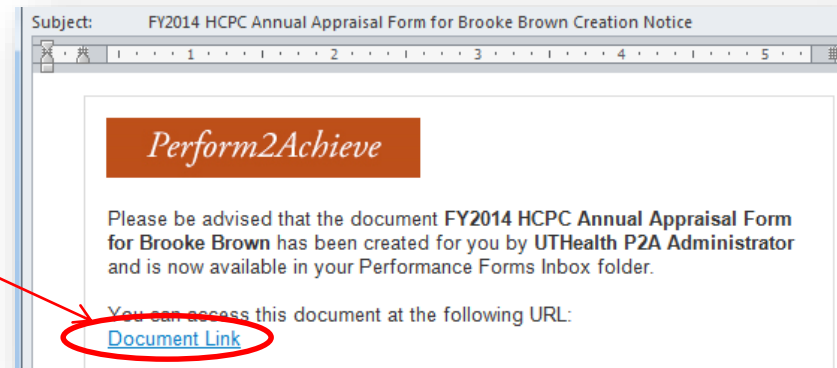
5

Save and schedule a performance discussion

Accessing Appraisal Forms

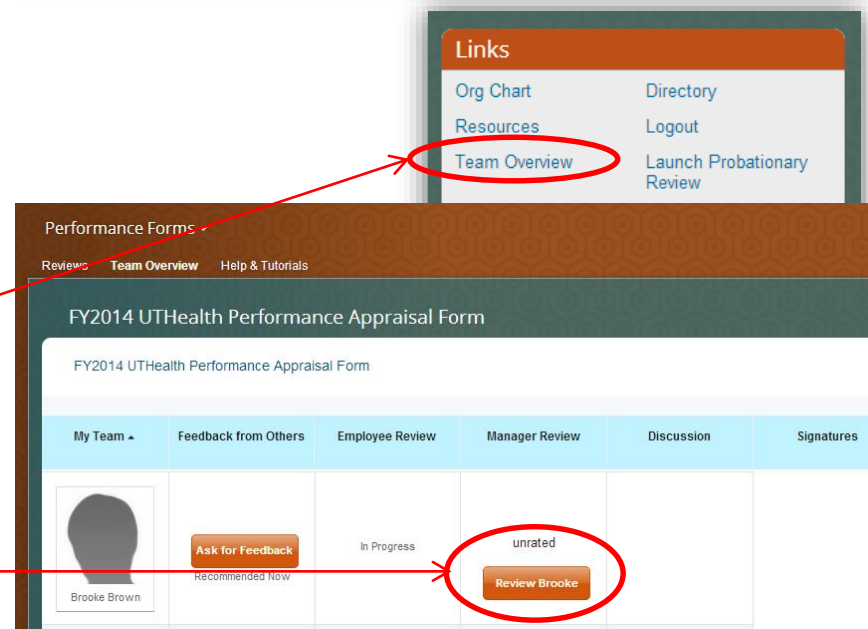
Method 1

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

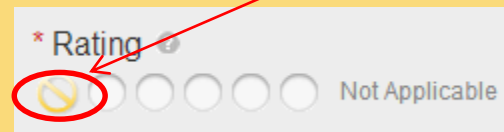
All Employees


- 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

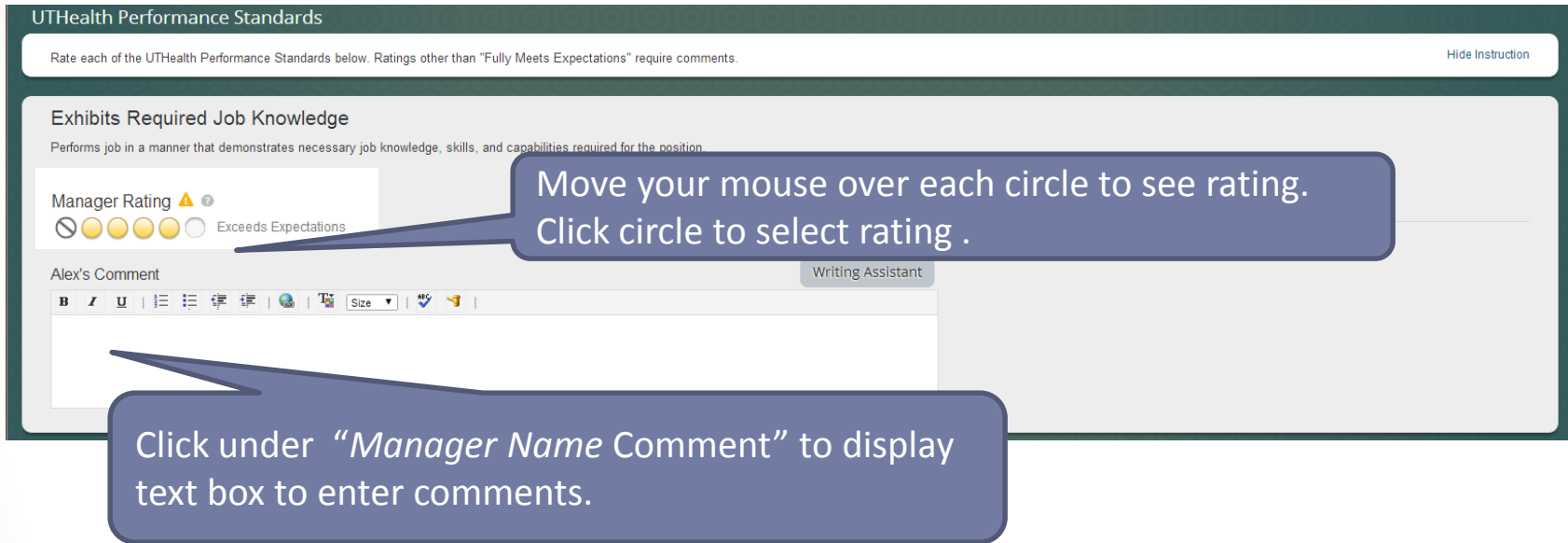
Exhibits Required Job Knowledge
Performs job in a manner that demonstrates necessary job knowledge, skills, and capabilities required for the position.

Manager Rating  Exceeds Expectations

Alex's Comment Writing Assistant





























**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.**



Text Box Tools:

Alex's Comment

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

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:

Save

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

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 Details

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

2

Update goal details as needed.

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

3

Click on "Save Changes"

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 a browser window displaying the Perform2Achieve system. In the top navigation bar, a printer icon is circled in red and labeled with a yellow star containing the number '1'. A red arrow points from this icon to a larger printer icon on a dark surface. Below this, the browser window shows the appraisal form for Brooke Brown. At the top of the form, a 'Print' button is circled in red and labeled with a yellow star containing the number '2'. The form content includes sections for 'Introduction', 'Rating Scale', '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 has "All" selected and a text input field containing "e.g. 1-5, 8, 11-13".
- Callout 5:** Points to the "Print" button in the top right corner 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).

Each standard also includes a "Brooke's Comment" section, which is currently empty with the text "Comments not provided".

