



Human Resources

Division of Administration
& Finance

Performance Evaluation

EMPLOYEE PROCESS GUIDE

(UH Staff, Trades, and Research Staff)

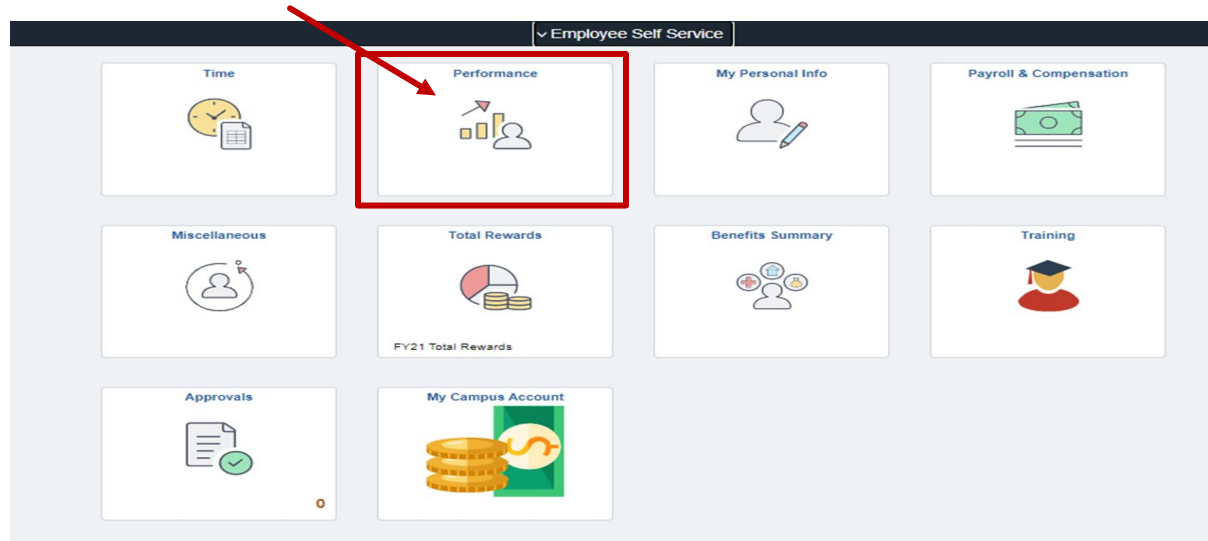
UH Human Resources - Compensation

ESTABLISHING GOALS

ESTABLISHING GOALS AS THE EMPLOYEE

STEP 1:

From the PeopleSoft home screen, select the ePerformance icon.

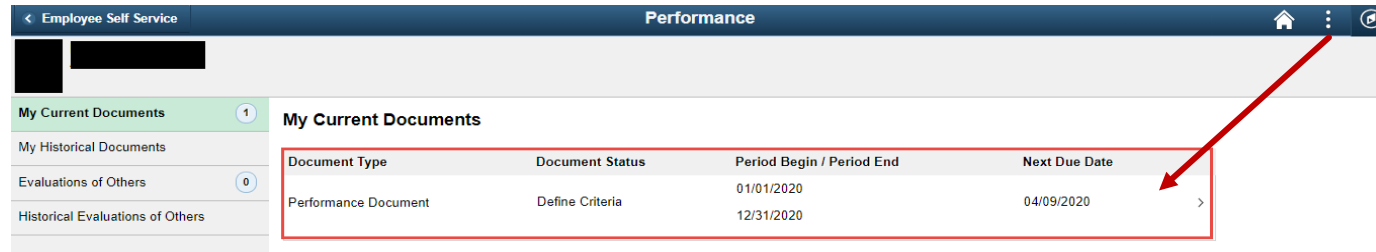


The screen will display your current performance document.

Document Type	Document Status	Period Begin / Period End	Next Due Date
Performance Document	Define Criteria	01/01/2020 12/31/2020	04/09/2020 >

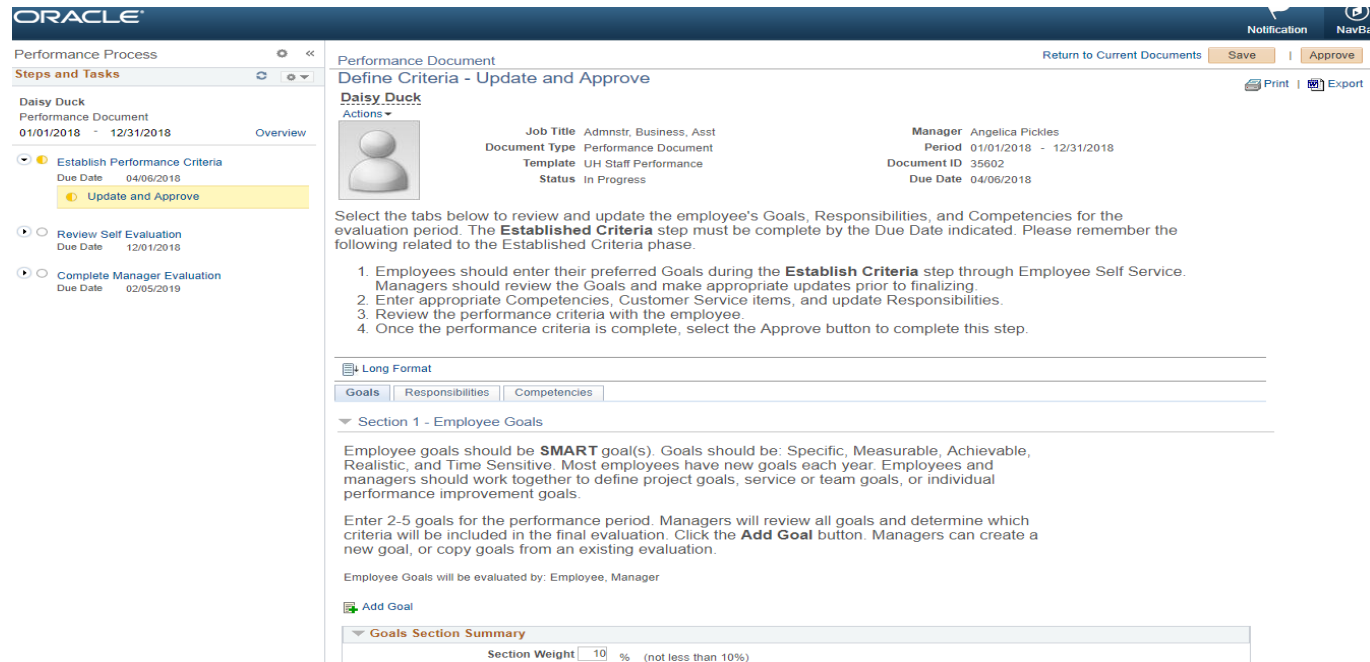
STEP 2:

Click anywhere in the display box and your document will open up. You're ready to begin establishing your Goals.



Document Type	Document Status	Period Begin / Period End	Next Due Date
Performance Document	Define Criteria	01/01/2020 12/31/2020	04/09/2020

The screen will display your Define Criteria screen.



ORACLE

Performance Process Performance Document Return to Current Documents Save Approve

Steps and Tasks

- Establish Performance Criteria Due Date: 04/06/2018 Update and Approve
- Review Self Evaluation Due Date: 12/01/2018
- Complete Manager Evaluation Due Date: 02/05/2019

Daisy Duck
Performance Document
01/01/2018 - 12/31/2018 Overview

Define Criteria - Update and Approve

Daisy Duck
Actions

Job Title Admnstr. Business, Asst
Document Type Performance Document
Template UH Staff Performance
Status In Progress

Manager Angelica Pickles
Period 01/01/2018 - 12/31/2018
Document ID 35602
Due Date 04/06/2018

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

Add Goal

Goals Section Summary

Section Weight % (not less than 10%)

Under the Goals Tab select Add Goal

Define Criteria - Update

Select the tabs below to review and/or update your Goals, Responsibilities, and Competencies for the evaluation period. The **Established Criteria** step must be completed 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.
2. Click the Save button.
3. Managers will review preferred Goals, Responsibilities, and Competencies.
4. Once the performance criteria is approved by your manager, it will be available for review.

 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.

Employee Goals will be evaluated by: Employee, Manager

 Add Goal

▼ Goals Section Summary

Section Weight % (not less than 40%)

STEP 3:

Here you will add your goal. Enter the title, description and employee measurement.

Performance Document

Add Your Own Goal

*Title

Description

Font Size **B** *I* U [List Icons] [Color Icons]

[Rich Text Editor Area]

Employee Measurement

Font Size **B** *I* U [List Icons] [Color Icons]

[Rich Text Editor Area]

Add

[Return](#)



Once you've entered your goal, click Add.

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

Performance Document

Define Criteria - Update

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.

Employee Goals will be evaluated by: Employee, Manager

Expand | Collapse | Add Goal

Goal 1: Add your Goal Title here

Description : Add your Description here. Remember SMART Goals.

SMART
Measurable
Attainable
Relevant
Timely

Employee Measurement : Add how you plan to measure your performance on this goal here.

Example: Notify department managers about documents that have been added/canceled each week, to help managers stay on task of making sure employees have documents completed on time.

Created By Carolyn Allen 02/28/2022 9:43AM
Last Modified By Carolyn Allen 02/28/2022 9:52AM

Goals Section Summary

Section Weight % (not less than 40%)



Print | Export

You'll repeat this process for each goal.

The Establishing Goals process is now complete.