Manager ePerformance Quick Reference

**Tip: Save frequently – document will time out so to avoid losing data please save frequently.**

* **Manager Starts the ePerformance document by logging in to the PeopleSoft System**

**√**  AccessUH <https://accessuh.uh.edu/login.php> or PeopleSoft <https://my.uh.edu/psp/paprd/?cmd=login&languageCd=ENG&>

**√** HR & Campus Solutions link 🡪 Select the Main Menu drop-down 🡪 Manager Self-Service 🡪 Performance Management 🡪 Performance Documents 🡪 Current Documents 🡪 Select Performance Document link next to the employee’s name you wish to begin evaluation/rating process for 🡪 click Start link

* **Manager Completes Criteria:**

**√** Establishes goals, responsibilities, and competencies
**√** Sets weights for individual items in sections (100% total within a section)
**√** Sets weights for overall section total (100% for combined overall total of all sections)
**√**  Manager clicks save and complete to route document to employee to view

* **Manager Evaluates Criteria and Rates Employee**

**√** Logs into AccessUH or Logs into PeopleSoft (see links above)

**√** HR & Campus Solutions link 🡪 Select the Main Menu drop-down 🡪 Manager Self-Service 🡪 Performance Management 🡪 Performance Documents 🡪 Current Documents 🡪 Select Performance Document link next to the employee’s name you wish to begin evaluation/rating process for 🡪 click Start link
**√** Review the establish criteria in each section and rate each item in the sections
**√** Input Comments in Section 8-Manager Comments if applicable
**√** Click the Calculate All Ratings button to calculate a final, overall rating for the evaluation

**√** Click “Save”

* **Manager Submits Document for Approval by Senior Manager**

**√** Click “Submit for Approval” for the document to be sent to the Sr. Manager for approval

**√** Click “Submit” to verify you are ready to send document to the Sr. Manager for approval

**√** Sr. Manager Approves or Denies document – document is returned to the Manager’s queue

* **Manager Marks Document ‘Available for Review’**

**√** Click the Save and then click Available for Review buttons. The employee is now able to review.

* **Employee Reviews Document and Adds Comments**

**√** Employee logs into P.A.S.S. to review document and adds comments in Section 9-Employee comments

**√** Click Save to ensure any entries will be saved to document

* **Manager and Employee meet to review document**
* **Manager marks document ‘Review Held’**

**√** Once manager and employee meets, Manager logs into P.A.S.S. and selects the Mark Review Held link 🡪 Review Held button 🡪 OK
**√** The document status now reflects Review Held and employee is now able to acknowledge

* **Employee marks document ‘Acknowledged’ and Adds Comments and document is routed to HR**

**√** Employee logs into P.A.S.S. and selects their current performance document. Click the Acknowledge link to acknowledge the review. The performance documents will be routed to HR.

* **HR Administrator Approves Document**