

2020

**PERFORMANCE
EVALUATION**

MANAGER GUIDE

UNIVERSITY of **HOUSTON**

HUMAN RESOURCES

MANUAL DOCUMENT INSTRUCTIONS

Part 2: To be completed by Manager

Overall Performance Rating

1 - Needs Improvement: Does not meet departmental performance expectations on a consistent basis. Does not consistently demonstrate the knowledge, skills, and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent and must be improved. Immediate and sustained improvement is needed. A performance improvement plan is required. *After Sr. Mgr approval, if rating is a 1, Manager should route this document to HR Compensation for further review.*

2 - Generally Meets Expectations: Generally meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position. Occasionally may exceed expectations of the position.

3 - Achieves Expectations: Meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in effective performance of the position. Meets deadlines. Frequently exceeds in one or more established job expectations.

4 - Exceeds Expectation: Consistently exceeds departmental performance to a degree that is obvious to supervisor, customers and peers. Consistently excels in demonstrating the knowledge, skills, and abilities that result in effective performance of the position requirements. Consistently serves as a role model to others. Truly outstanding level of contribution (well beyond position requirements) during the entire performance period.

5 - Outstanding Performance: This rare, superior performance is beyond what other high achieving performers would produce and is seldom equaled by peers or colleagues. The individual is widely regarded as innovative or expert in their field by external and internal contacts. The employee made individual contributions within the review period well beyond goals set for their role and achieved outcomes that were widely recognized as having significant impact that produced a measurable fiscal or physical enhancement to the University. The contribution must be recognized externally to the organization, such as regionally, state-wide or nationally as establishing a new standard or business improvement that would be adopted by other higher education institutions. The achievements or accomplishments of the individual must be documented and verifiable. *After Sr. Mgr approval, if rating is a 5, Manager should route this document to HR Compensation for further review prior to sharing with Employee.*

Comments:

Provide a brief justification for the overall performance rating awarded.

Manager's Signature/Date:

Sign and date the document indicating that you completed the section.

Forward document to Senior Manager by **Friday, January 29, 2021.**

Senior Manager's Signature/Date:

Sign and date the document indicating your approval of this review.

Return to Manager by **Friday, February 19, 2021.**

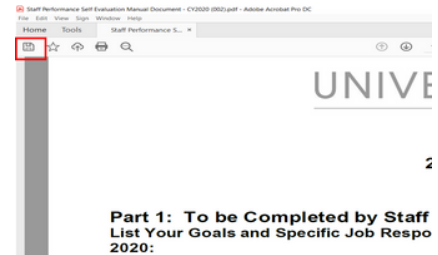
Performance Completion:

Managers: Upload a copy of the completed document to the staff member's 2020 electronic ePerformance document and assign the applicable rating in PASS by **Monday, March 8, 2021.**

To complete Part 2 of the Staff Performance Evaluation Document follow the steps below:

Step 1:

Save the document to the file of your choice.



2020 Staff Performance Evaluation Manual Document

Staff Member: Empl ID:
Department:
Manager:
Senior Manager:

Step 2:

Enter the staff member's name, employee ID, department, your name as the manager, and senior manager's name.



Step 3:

Rate the employee's performance for the period January 1, 2020 through December 31, 2020 in consideration of their major accomplishments and performance of their primary duties and responsibilities using whole numbers on the Rating Scale.

Part 2: To be Completed by Manager and signed by both Manager and Senior Manager:

- Rating Scale:**
- 1 – Needs Improvement
 - 2 – Generally Meets Expectations
 - 3 – Achieved Expectations
 - 4 – Exceeds Expectations
 - 5 – Outstanding Performance

Overall Performance Rating:

NOTE: All evaluations with a rating of "1" or "5" must be sent directly to the HR Compensation department. DO NOT upload these forms into P.A.S.S.



Comments:

Step 4:

Provide a brief justification for the overall performance rating awarded.

Step 5:

Sign and date the document indicating you completed this section and save. Email the document to the Senior Manager no later than **Friday, January 29, 2020**.

Manager's Signature: _____
Senior Manager's Signature: _____
Date: _____

The Senior Manager should sign and date the document indicating their approval and return to the manager no later than **Friday, February 19, 2021**.

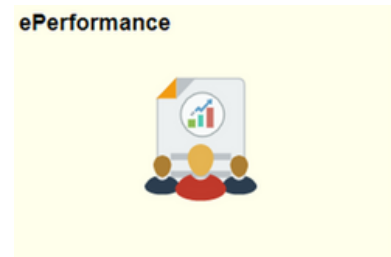
****After Sr. Manager approval, the Manager should review the performance evaluation with the employee.**

Step 6:

Upload the approved document into P.A.S.S. using the following steps:

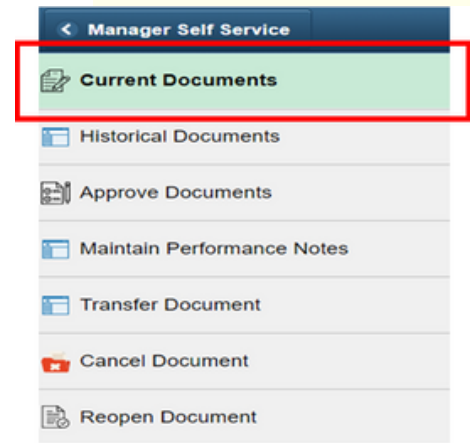
Step 6a:

Select the ePerformance tab from the Manager Self Service Menu



Step 6b:

Select Current Documents from the UH ePerformance screen menu.



Step 6c:

Select the staff member from the Performance Documents section.

Performance Documents

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
1234567	Sasha Houston	Performance Document	Evaluation in Progress	01/01/2020	12/31/2020	Business Counselor 2	03/08/2021

[Return to Select Employees](#)

Step 6d:

Select the rating given to the staff member on the evaluation form. **REMEMBER:** All evaluations with a rating of "1" or "5" must be sent directly to the HR Compensation department. **DO NOT** upload these forms into P.A.S.S.

▼ Goal 1: Review Rating

Manager Rating	0.00
Created By: Template	
Last Modified By: Shasta C	

- 1-Needs Improvement
- 2-Generally Meets Expectations
- 3-Achieved Expectations
- 4-Exceeds Expectations
- 5-Outstanding Performance

Step 6e:

Click on Calculate All Ratings above Section 1. You will see the selected rating reflected in the Goals Summary and Overall Summary sections of the evaluation screen.

✓ Check Language | **Calculate All Ratings** | ✕ Cancel Evaluation

▼ Section 1 - Employee Goals

Step 7:

Upload a copy of the completed and approved evaluation document no later than **Monday, March 8, 2021** by selecting Add Attachment below the Attachments section.

Attachments

File Name

+ Add Attachment

Step 7a:

Enter a description of your choice and select *Employee and Manager* below Attachment Audience. Selecting *Employee and Manager* is required. Select Save at the top right corner of the evaluation screen.

Attachments

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
Sasha_Houston_Eval_2020.pptx	Evaluation	Employee and Manager	11/19/2020 4:18:04PM	Shasta Cougar	🗑️

+ Add Attachment

Step 7b:

Select Complete at the top right corner of the evaluation screen.



Final Step:

Select Confirm on the Complete Evaluation screen.

After this, you will see a confirmation message informing you the document was completed successfully.

Complete Evaluation

You have almost finalized this document. If you have no further entries select confirm to complete this document.



Performance Document

Confirmation - Document Completed

✔ You have successfully completed your evaluation.