

# ePerformance

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EMPLOYEE GUIDE

# ePerformance Employee Instructions

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# ePerformance 4-Step Process

## Overview

UTA is committed to the practice of meaningful, timely and productive performance management for all employees. ePerformance, a platform within [UTShare](#), is the software that facilitates the staff online performance evaluation process. ePerformance has a built-in workflow providing a place for employees to complete self-evaluations and managers to complete and share performance evaluations with employees. The system is used as a standardized approach for documenting performance evaluations for all staff employees.

The ePerformance process is organized in four main steps. The process begins when Human Resources assigns the performance evaluations. You will receive automated email notifications to guide you through the process.



For assistance contact [hrperformreviews@uta.edu](mailto:hrperformreviews@uta.edu)

## Navigation

### Sign In

Sign into UTShare to view or select the **Employee Self Service** option from the dropdown menu on the homepage.



### Performance Tile

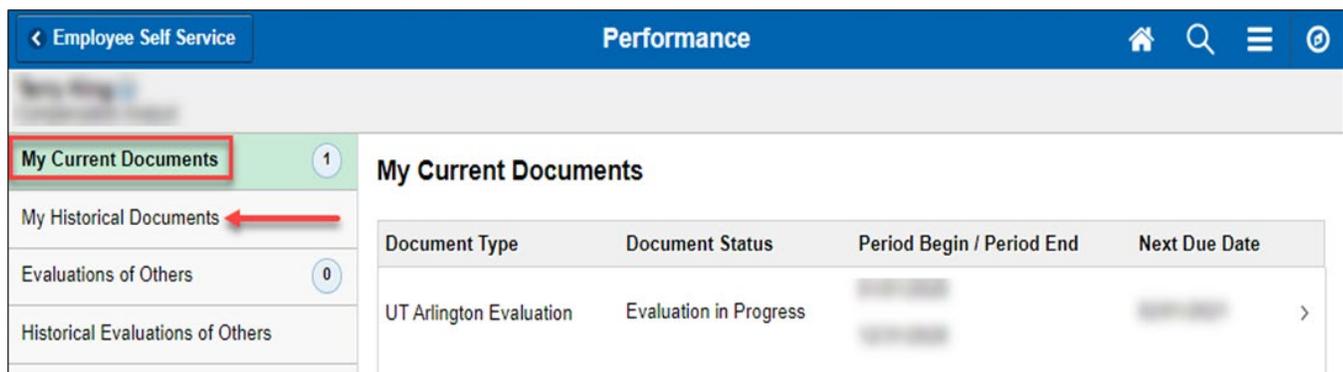
Select the Performance tile. Use the Performance tile to access current and historical ePerformance documents. You will notice that the Next Due Date (if applicable) is on the Performance tile.



**TIP:** Save often; the system will automatically log you out after 2 hours of inactivity.

### My Current Documents

- Select your evaluation from your **My Current Documents**. Click on the record to launch the ePerformance interface. From ePerformance, you can complete your self-evaluation and view the final manager evaluation.
- Select **My Historical Documents** to view all prior year performance evaluations.



## Step 1 – Employee Completes Self-Evaluation

The self-evaluation allows you to reflect on your performance over the past year and document your accomplishments and their impact on your department and the university.

### 1. Evaluation Document & Instructions

- A. **Task Panel:** helps you keep track of the status and remaining steps of the evaluation
- B. **Instructions:** provides detailed steps and information that will update as you move through the process
- C. **Header:** Your job and evaluation information (if your information is not correct, contact hrperformreviews@uta.edu.)
- D. **Actions:** **Save** and come back later to complete or **Complete** to notify your manager it's ready to view
- E. **Attachments:** attach files and documentation

Select the **Self-Evaluation** tab to begin.

The screenshot displays the 'Performance Process' interface for a 'UT Arlington Evaluation'. The page is titled 'Self-Evaluation - Update and Complete'. The interface is annotated with letters A through E corresponding to the text in the previous section:

- A:** Points to the 'Steps and Tasks' navigation pane on the left, which shows 'Complete Self Evaluation' (Due Date: 02/01/2021) and 'Review Manager Evaluation' (Due Date: 03/01/2021).
- B:** Points to the 'EMPLOYEE INSTRUCTIONS' section, which provides detailed steps for completing the self-evaluation, including providing comments, uploading attachments, and clicking 'Complete'.
- C:** Points to the header section containing evaluation details: Job Title (Analyst), Document Type (UT Arlington Evaluation), Template (2020 Staff Evaluation), Status (Evaluation in Progress), Manager, Period (01/01/2020 - 12/31/2020), Document ID (11124), and Due Date (02/01/2021).
- D:** Points to the 'Save' and 'Complete' buttons in the top right corner.
- E:** Points to the 'Add Attachment' button in the Attachments section.

## 2. Provide Comments

Select **Expand** to view all questions or select the arrow next to each question.

Use the **Employee Comments** box displayed under each of the self-evaluation questions to document your feedback. Include projects, goals, and successes you have achieved over the review period.

Section 2 - Employee Self-Evaluation Survey

Expand Collapse

Priorities

Description : What do you consider to be the top 3 to 5 top priorities of your job?

Employee Comments

Created By: Template 10/29/2020 4:20PM

Accomplishments

- Ability to Perform
- Contribution to Department and Community

## 3. Add Attachments

You may add attachments to your self-evaluation, providing documentation to your manager. This is not required. Select **Add Attachment** link to browse and select your file. Add a description as needed.

NOTE: Your Manager cannot view this document unless you set the **Attachment Audience** as "Employee & Manager". Otherwise, a document can remain private if the audience is chosen as "Employee".

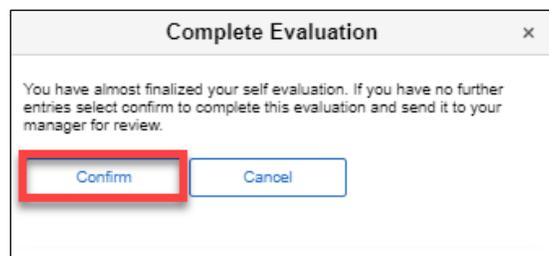
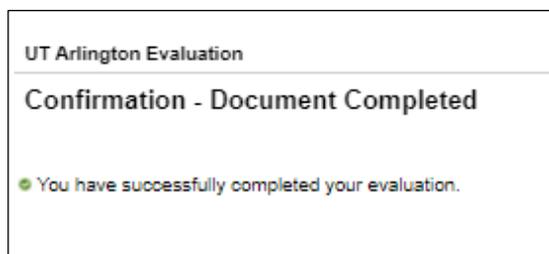
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
2020-08-18_14-39-53.png	Customer Thank You Notes	Employee and Manager	10/01/2020 4:50:21PM	

+ Add Attachment

## 4. Evaluation Complete/Manager Notification

Once your self-evaluation is complete, select **Complete** to notify your manager that your evaluation is ready to review. Your manager will automatically receive an email to complete the manager evaluation.

To print or view, select the **Print/Export** links. To send additional notes to your manager, select the **Notify** link to send an email.



### Step 2 – Manager Evaluation

Your manager will begin the final performance evaluation once you have completed your self-evaluation. Your manager will use the information you provide to assist in creating the final performance evaluation which covers the entire review period (January – December).

### Step 3 – Evaluation Discussion

After your manager completes the manager evaluation, you will receive an email notification that your evaluation is available for you to review. Partner with your manager to schedule dedicated time to discuss your performance evaluation. This conversation is an opportunity for you and your manager to discuss your evaluation, performance expectations, and goals for the upcoming year.

## Step 4 – Employee Evaluation Acknowledgment

### 5. Employee Final Comments

Once you have met with your manager to discuss your performance evaluation, you may add final evaluation comments. Sign in to ePerformance, navigate to your evaluation, and select the **Employee Comments** tab.

The screenshot shows the 'Performance Process' interface for a 'UT Arlington Evaluation'. The 'Manager Evaluation - Acknowledge' tab is active. The status is 'Pending Acknowledgement'. The 'Employee Comments' tab is highlighted with a red arrow. The interface includes a sidebar with 'Steps and Tasks' and a main content area with various tabs like 'Instructions', 'Self-Evaluation', 'Manager Evaluation', 'Projects', 'Strengths', 'Areas to Improve', 'Training/Development', 'Performance Summary', and 'Employee Comments'.

### 6. Employee Acknowledgment

When complete, select **Save** to save your final comments and **Acknowledge** to acknowledge the evaluation. By electronically acknowledging the evaluation, your signature does not confirm/deny that you agree with the comments contained within. It confirms that you have received the document.

Once you acknowledge the evaluation, this concludes your online performance evaluation. Your evaluation is now available in historical documents.

The screenshot shows the 'Performance Process' interface for a 'UT Arlington Evaluation'. The 'Acknowledge' button is highlighted in red. The interface includes a sidebar with 'Steps and Tasks' and a main content area with various tabs like 'Instructions', 'Self-Evaluation', 'Manager Evaluation', 'Projects', 'Strengths', 'Areas to Improve', 'Training/Development', 'Performance Summary', and 'Employee Comments'.

**Acknowledge Review Held**

You have chosen to acknowledge that you and your manager have reviewed this document.

**UT Arlington Evaluation**

**Confirmation - Employee Acknowledgement**

You have successfully acknowledged this document.

## Appendix

## Performance Rating Scale

Rating	Definition	Application Guidance
<b>5</b> Outstanding	<ul style="list-style-type: none"> <li>Consistently goes well above and beyond job expectations.</li> <li>Consistently exhibits strong initiative when accomplishing tasks, with values and work behaviors that consistently surpass expectations.</li> <li>Demonstrates leadership qualities with sustained excellent performance throughout the entire year.</li> </ul>	<ul style="list-style-type: none"> <li>Outstanding contribution to the department and university. Results far exceed those of most others.</li> <li>Viewed as a role model for behavior consistent with the standards of the university.</li> <li>The work completed and the methods used to obtain results reflect truly outstanding and unique skills.</li> </ul>
<b>4</b> Above Expectations	<ul style="list-style-type: none"> <li>Consistently fulfills performance expectations and frequently exceeds them.</li> <li>Demonstrates performance at a very high level of quality, significantly contributes to the success of the services and projects they support and consistently generates valuable results above those expected of the position.</li> <li>Is recognized as a top performer.</li> </ul>	<ul style="list-style-type: none"> <li>Frequently exceeds in some areas, meets expectations in others, relative to peers.</li> <li>Valuable contributor to department and university success.</li> <li>Performs with a high level of independence.</li> <li>Assumes and completes assignments beyond what is normally expected of the position.</li> </ul>
<b>3</b> Solid Performer	<ul style="list-style-type: none"> <li>A strong performer whose performance most often meets the requirements of the job.</li> <li>Occasionally, this employee may exceed expectations of the job.</li> </ul>	<ul style="list-style-type: none"> <li>Consistently meets expectations relative to peers.</li> <li>Meets performance standards and responsibilities with solid, dependable performance.</li> <li>Consistently achieves the standards for the position and may occasionally exceed expectations.</li> </ul>
<b>2</b> Improvement Needed	<ul style="list-style-type: none"> <li>Performance which leaves room for improvement.</li> <li>While the employee may meet expectations some of the time, the employee fails to meet many of the significantly important requirements of the job, or the goals established for the year.</li> </ul>	<ul style="list-style-type: none"> <li>Inconsistent or unsatisfactory performance in some areas, meets expectations in others.</li> <li>Contribution to the department needs improvement or is unsatisfactory at times.</li> <li>Failed to meet performance standards.</li> <li>Requires significant direction or guidance in carrying out responsibilities. Immediate improvement is essential.</li> </ul>
<b>1</b> Unsatisfactory	<ul style="list-style-type: none"> <li>Consistent work performance results that are unsatisfactory and below the basic requirements and expectations of the position.</li> <li>Failure to demonstrate significant improvement requires immediate review and corrective action to address performance and/or behavioral deficiencies.</li> <li>Possible separation of employment may be required.</li> </ul>	<ul style="list-style-type: none"> <li>Consistently unsatisfactory performance; performance results are below those of most others.</li> <li>Contribution to the department or university is unsatisfactory most of the time</li> <li>Immediate improvement is essential.</li> </ul>