

ePerformance

MANAGER GUIDE

ePerformance: Manager Instructions

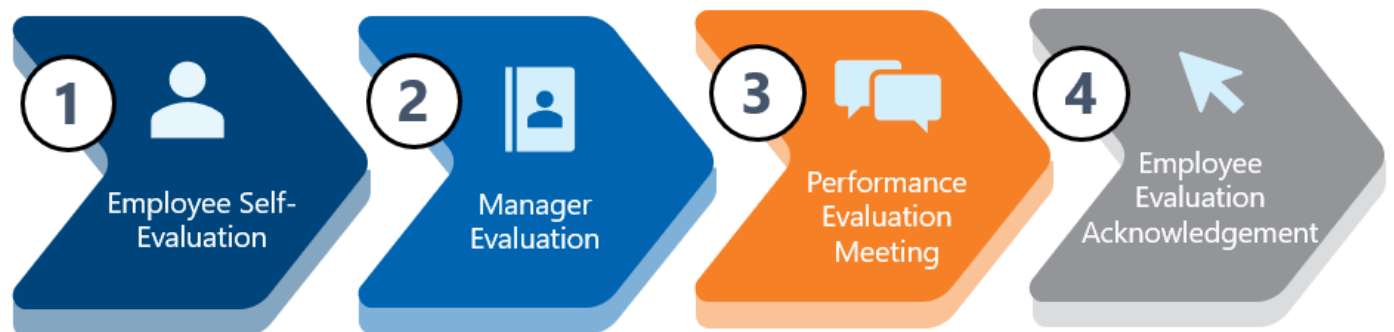
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ePerformance 4-Step Process

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.

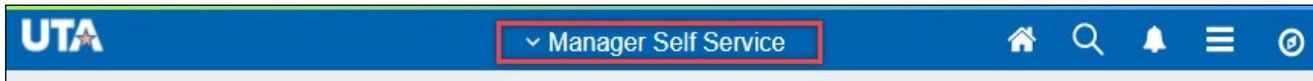


For assistance contact hrperformreviews@uta.edu

Navigation

Sign in

Select the **Manager Self Service** option from the dropdown menu on the UTShare homepage.



Team Performance Tile

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



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

Current Documents – Left hand task panel of landing page

- **Current Documents** includes all available evaluations.
- **Historical Documents** contain all completed evaluations for your team.
- **View-Only Documents** allows managers to view all direct and indirect report documents.
- **Approve Documents** not used at this time

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Manager	UT Arlington Evaluation	Evaluation in Progress	01/01/2020 12/31/2020	02/01/2021

Step 1 – Employee Completes Self-Evaluation

Once the employee's self-evaluation is complete, you will receive an automatic email to complete the manager evaluation.

Step 2 – Manager Completes Employee Evaluation

Select the employee's name on the **Current Documents** page to view the self-evaluation and complete the manager evaluation.

Document Overview

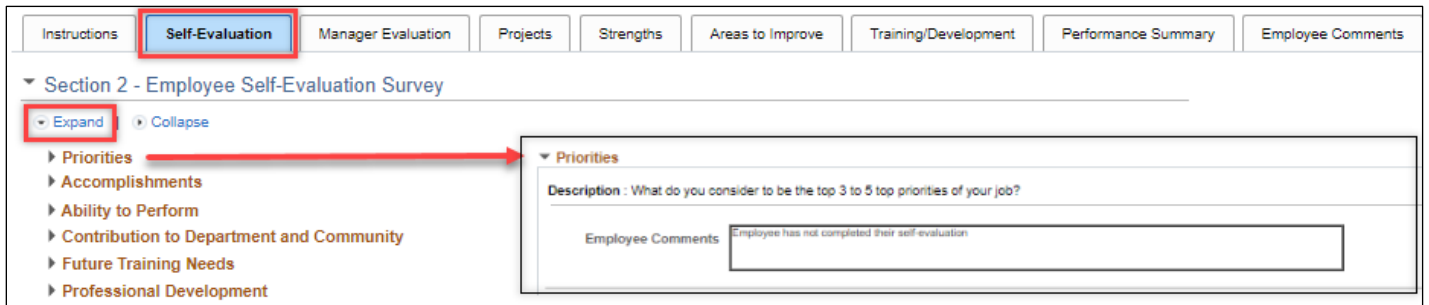
- A. **Task Panel:** helps you keep track of the status and remaining steps of the evaluation
- B. **Instructions:** will provide detailed steps and information that will update as you move through the process
- C. **Header:** employee's job and evaluation information. If any of this information is incorrect, contact hrperformreviews@uta.edu
- D. **Actions:** save and/or come back later to complete & share with the employee
- E. **Attachments:** add private or shared attachments with the employee

The screenshot displays the 'Performance Process' interface for a 'UT Arlington Evaluation' document. The interface is divided into several sections:

- Task Panel (A):** Located on the left, it shows the current step 'Update and Share' under 'Complete Manager Evaluation'.
- Header (C):** Displays document details including 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 (11130), and Due Date (03/01/2021).
- Actions (D):** A red box highlights the 'Manager Evaluation - Update and Share' tab, with a 'Save' button and 'Share with Employee' button in the top right.
- Instructions (B):** The main content area shows 'Section 1 - Instructions' for the 'MANAGER INSTRUCTIONS', providing detailed steps for completing the evaluation.
- Attachments (E):** At the bottom, it shows 'No Attachments have been added to this document' and an 'Add Attachment' button.

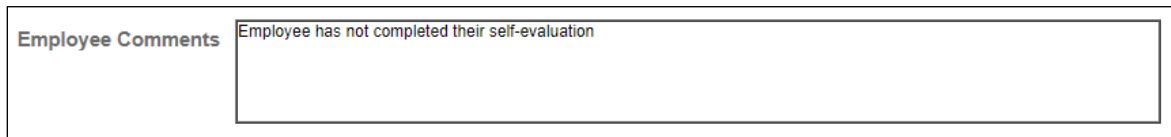
1. Review Employee's Self-Evaluation

Select the **Self-Evaluation** tab and select the **Expand** link to view the evaluation questions and feedback.



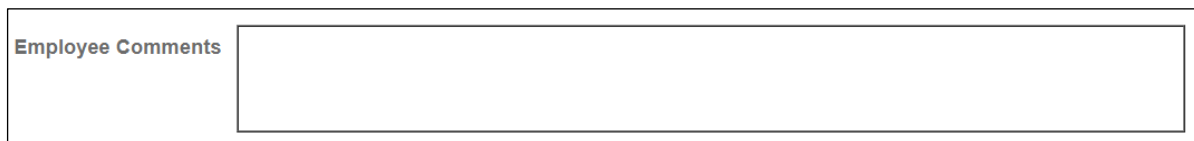
The screenshot shows a navigation bar with tabs: Instructions, Self-Evaluation (highlighted with a red box), Manager Evaluation, Projects, Strengths, Areas to Improve, Training/Development, Performance Summary, and Employee Comments. Below the navigation bar is a section titled "Section 2 - Employee Self-Evaluation Survey". Under this section, there are two links: "Expand" (highlighted with a red box) and "Collapse". A red arrow points from the "Expand" link to a detailed view of the "Priorities" question. The question is titled "Priorities" and has a description: "Description : What do you consider to be the top 3 to 5 top priorities of your job?". Below the description is a text box labeled "Employee Comments" containing the message: "Employee has not completed their self-evaluation".

- If the employee **has not completed** their self-evaluation, the comment box will display a system message: "Employee has not completed their self-evaluation".



The screenshot shows a text box labeled "Employee Comments" containing the message: "Employee has not completed their self-evaluation".

- If the employee **has completed but did not comment**, the comment box will display as blank.



The screenshot shows a text box labeled "Employee Comments" which is currently blank.

2. Begin Manager Evaluation

Select the **Manager Evaluation** tab, review the instructions, and select the **Expand** link to view the performance factors. The rating scale and descriptions are listed on the **Manager Evaluation Tab** and in the Appendix of this manual.

Calculate All Ratings

Instructions | Self-Evaluation | **Manager Evaluation** | Projects | Strengths | Areas to Improve | Training/Development | Performance Summary | Employee Comments

Section 3 - Manager Evaluation: Performance Factors

For each of the Performance Factor below, please provide your rating and comments of the employee performance during the appraisal year. A description of performance factor rating and criteria is listed below.

Comments are required on all factors.

Numeric Rating	Rating Description	Criteria
1	Unsatisfactory	An employee rated in this category has consistent work performance results that are unsatisfactory and below the basic requirements and expectations of the position. Failure to demonstrate significant improvement requires immediate review and corrective action to address performance and/or behavioral deficiencies. Possible separation of employment may be required.
2	Improvement Needed	An employee rated in this category has performance which leaves room for improvement. While this 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.
3	Solid Performer	An employee rated in this category is a strong solid performer whose performance most often meets the requirements of the job. Occasionally, this employee may exceed expectations of the job.
4	Above Expectations	An employee rated in this category consistently fulfills performance expectations and frequently exceeds them. 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. Is recognized as a top performer.
5	Outstanding	An employee rated in this category consistently goes well above and beyond job expectations. Consistently exhibits strong initiative when accomplishing tasks, with values and work behaviors that consistently surpass expectations. This employee demonstrates leadership qualities with sustained excellent performance throughout the entire year.

Expand | Collapse

3. Rate & Comment

Provide your ratings and comments on all performance factors according to the classification of employee being evaluated.

- **Comments are required on all performance factors.**
- **Staff will have different performance factors compared to an Administrator & Professional/Manager.**

Leadership

Description : Acknowledges the efforts of others and gives appropriate credit for their accomplishments. Forms collaborative relationships that provide leadership and service that engages our organization fully. Interacts well with staff, leaders, students and partners within the community.

Manager Rating: 0.00

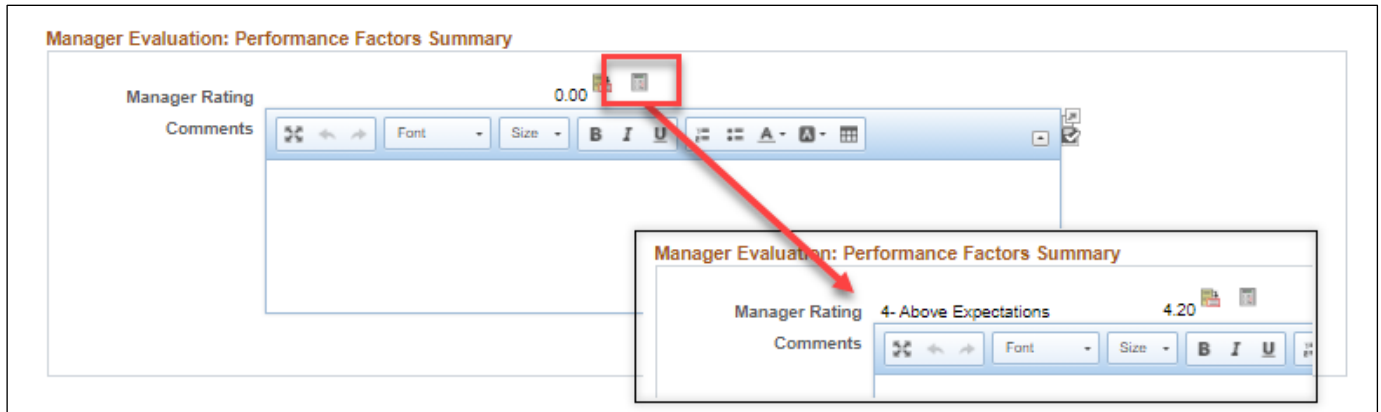
Manager Comments

Created by: Template 10/31/2020 11:14AM

- Decision Making
- Planning
- Fiscal Mgmt / Internal Controls
- Staff Management
- Human Resources
- Professional Expertise

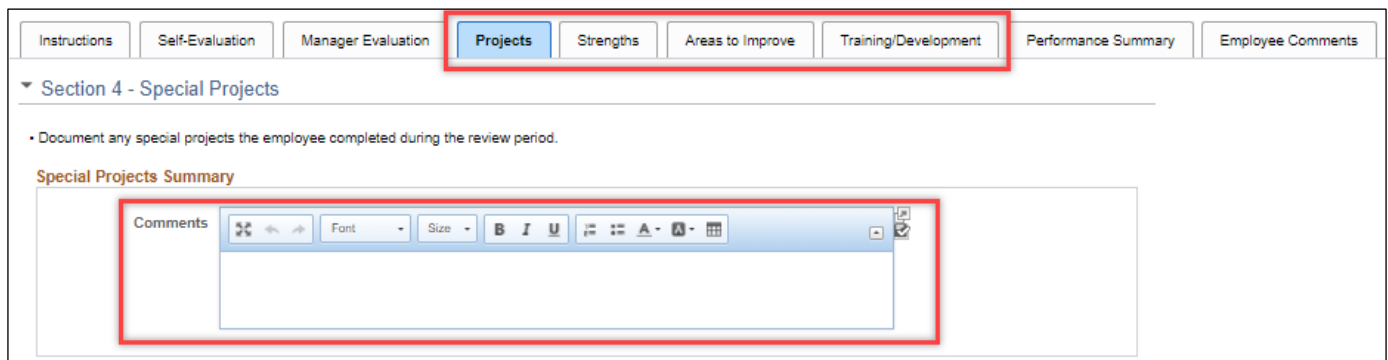
4. Calculate Rating

When finished with the ratings and comments, select the calculator icon to calculate the overall rating in the summary. **Comments are required in the Summary.**



5. Projects, Strengths, Areas to Improve, & Training/Development Tabs

Use the comment boxes to provide feedback on each of the four tabs that define additional factors that impact the overall evaluation.



6. Provide Required Comments

Use the comment box displayed in the **Performance Summary** tab to provide a summary of your final comments on the employee's overall performance. **Comments are required.** The overall manager rating will automatically populate from the Manager Evaluation tab.

Instructions Self-Evaluation Manager Evaluation Projects Strengths Areas to Improve Training/Development **Performance Summary** Employee Comments

▼ Section 8 - Overall Performance Summary

• Please provide any final comments regarding employee's overall performance.
Comments are required.

Overall Performance Summary Summary

Manager Rating 4 - Above Expectations 4.20

Comments

7. Employee Comments tab

This tab will be used by your employee to provide their final thoughts or comments. **No action required.**

Instructions Self-Evaluation Manager Evaluation Projects Strengths Areas to Improve Training/Development Performance Summary **Employee Comments**

▼ Section 9 - Employee Acknowledgement

• My electronic acknowledgement indicates I have reviewed this performance evaluation and have discussed the contents with my immediate supervisor or his/her designee. My acknowledgement of this evaluation also means that I have been advised of my performance and does not necessarily imply that I agree with the evaluation. My comments are below.

PLEASE NOTE : Within 5 business days, you can supply the Manager with your additional comments and a copy will be added to evaluation as historical documents.

Employee Acknowledgement Summary

Employee Comments

8. Add Attachments (Optional)

Select **Add Attachment** link to browse and select your file. Add a description as needed. NOTE: Your employee cannot view this document unless you choose the **Attachment Audience is selected as "Employee & Manager"**. Otherwise, a document will remain private if the audience is chosen as "Manager".

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

+ Add Attachment

9. Save & Share with Employee

When you are done and ready for the employee to view the document, click **Share with Employee** and then **Confirm**. This action will automatically send an email to the employee notifying them that their performance evaluation is ready to view.

To print or view the evaluation, select the **Print/Export** links. To send an email directly to the employee, select the **Notify** link.

The screenshot shows the 'Performance Process' interface for 'UT Arlington Evaluation'. The 'Manager Evaluation - Update and Share' section is active. The 'Save' and 'Share with Employee' buttons are highlighted with red boxes. A green arrow points to the 'Print | Notify | Export' options at the bottom right.

The 'Share with Employee' dialog box contains the following text: "Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation. The overall rating you have assigned to this employee is 4- Above Expectations." Below the text are 'Confirm' and 'Cancel' buttons.



The success message displays: "UT Arlington Evaluation" followed by "Confirmation - Shared with Employee" in bold. Below this, a green checkmark icon is followed by the text: "You have successfully shared your evaluation with the employee."

10. Troubleshooting Required Comments

If ratings or comments are not supplied on the **Manager Evaluation & Performance Summary** tabs, the document cannot be shared. The error messages will let you know what and where the required ratings/comments are located. Edit as needed and select **Share with Employee as described in Step 11**.

⚠ Problem(s) completing your request:

Please enter a rating for all items in the Manager Evaluation: Performance Factors section.
 Comments are required for **Effective Use of Time** in Manager Evaluation: Performance Factors for a rating of 5
 Comments are required for the **section summary** in Manager Evaluation: Performance Factors for a rating of 5
 Comments are required for the **section summary** in Overall Performance Summary for a rating of 5

Step 3 – Evaluation Discussion

Schedule and conduct the performance evaluation discussion with your employee. This conversation is an opportunity for you and your employee to discuss the evaluation, performance expectations, and goals for the upcoming year. ***This should be completed prior to the employee acknowledging the evaluation.***

Step 4 – Employee Evaluation Acknowledgment

1. Pending Employee Acknowledgment (Override Acknowledgement)

After the evaluation discussion occurs, the employee will electronically acknowledge the evaluation and provide their final comments. If the employee is unavailable to acknowledge such as an approved leave of absence or if the employee refuses to sign, you can override the acknowledgment to finalize the document. The purpose of the override is to move the evaluation through the process.

The screenshot displays the 'Performance Process' interface for a 'UT Arlington Evaluation'. The main content area shows the following details:

Job Title	Manager	Manager	
Document Type	UT Arlington Evaluation	Period	01/01/2020 - 12/31/2020
Template	2020 Staff Evaluation	Document ID	11130
Status	Pending Acknowledgement	Due Date	03/01/2021

The interface also features a sidebar with 'Steps and Tasks' and a bottom navigation bar with various tabs. A red box highlights the 'Override Acknowledgement' button in the top right corner.

2. Acknowledged & Evaluation Complete

You will receive an email once the evaluation has been acknowledged by the employee. The acknowledged evaluation will contain any final comments that the employee documented. You will also receive an email once the evaluation is “finalized”. This is to confirm the document is complete and provide a link back to the **Historical Document**.

To print or view documents, open the evaluation and select the **Print/Export** links located on top right-hand corner.

The screenshot displays the 'Performance Process' interface for a 'UT Arlington Evaluation'. The document status is 'Manager Evaluation - Completed'. The document details include: Job Title: Manager, Document Type: UT Arlington Evaluation, Template: 2020 Staff Evaluation, Status: Completed, Period: 01/01/2020 - 12/31/2020, Document ID: 11130, and Due Date: 03/01/2021. The interface includes a navigation menu on the left with options like 'Review Self Evaluation' and 'Complete Manager Evaluation'. The main content area shows 'Section 1 - Instructions' with the text: 'MANAGER INSTRUCTIONS' and 'The performance evaluation cycle has been completed. No further action is required.' There are also 'Attachments' and 'Audit History' sections. The top right corner features 'Print', 'Notify', and 'Export' links.

3. Historical Document Available

Completed evaluations will be available in your **Manager Self Service Team Performance Tile** under **Historical Documents**.

The screenshot shows the 'Team Performance' interface with a sidebar on the left containing 'Current Documents', 'Historical Documents', 'View-Only Documents', and 'Approve Documents'. The 'Historical Documents' section is active, displaying a table of completed evaluations. The table has columns for 'Name / Job Title', 'Document Type', 'Document Status', and 'Period Begin / Period End'. Two rows are visible, both for 'UT Arlington Evaluation' with a status of 'Completed' and a period of '01/01/2020 - 12/31/2020'.

Name / Job Title	Document Type	Document Status	Period Begin / Period End
[Redacted]	UT Arlington Evaluation	Completed	01/01/2020 - 12/31/2020
[Redacted]	UT Arlington Evaluation	Completed	01/01/2020 - 12/31/2020

4. Reopening a Self-Evaluation

You can reopen the employee's self-evaluation if the employee requests to make changes after the document is submitted to you.

- Open the employee's evaluation from the **Team Performance** landing page
- Click on **Review Self Evaluation** in the left task panel
- Click on **View**
- Click on **Reopen** and **Confirm**

The screenshot displays the 'Team Performance' interface. On the left, the 'Steps and Tasks' panel shows a list of tasks: 'Review Self Evaluation' (Due Date: 12/02/2020) and 'Complete Manager Evaluation' (Due Date: 12/30/2020). The 'Review Self Evaluation' task is selected, and the 'View' option is visible. On the right, the 'Self-Evaluation - Completed' page for 'Terry King' is shown. The 'Actions' menu includes a 'Reopen' button, which is highlighted with a red box. A red arrow points from this button to the 'Review Self Evaluation' task in the sidebar. Below the 'Reopen' button are tabs for 'Instructions' and 'Self-Evaluation'. The 'Instructions' tab is active, showing 'MANAGER INSTRUCTIONS' and a note: 'The performance evaluation cycle has been completed. No further action is required.' A link 'here' is provided for more information.



TIP: Once you share the final evaluation with the employee, you will need to contact hrperformreviews@uta.edu to reopen the evaluation to make any changes.

Appendix

Performance Rating Scale

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