ePerformance

MANAGER GUIDE

Office of Human Resources
VERSION 1.0
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.

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- **Historical Documents** contain all completed evaluations for your team.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
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
1. Review Employee’s Self-Evaluation

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

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

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

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.**
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.

7. **Employee Comments tab**

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

<table>
<thead>
<tr>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name</td>
</tr>
<tr>
<td>2020-08-16_14-39-53.png</td>
</tr>
<tr>
<td>+ Add Attachment</td>
</tr>
</tbody>
</table>

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.
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.

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**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.**

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**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.
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.

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 Historical Document Available
Completed evaluations will be available in your Manager Self Service Team Performance Tile under Historical Documents.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

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**TIP:** Once you share the final evaluation with the employee, you will need to contact [hrperformreviews@uta.edu](mailto:hrperformreviews@uta.edu) to reopen the evaluation to make any changes.
Appendix
## Performance Rating Scale

<table>
<thead>
<tr>
<th>Rating</th>
<th>Definition</th>
<th>Application Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Outstanding</td>
<td>- Consistently goes well above and beyond job expectations.</td>
<td>- Outstanding contribution to the department and university. Results far exceed those of most others.</td>
</tr>
<tr>
<td></td>
<td>- Consistently exhibits strong initiative when accomplishing tasks, with values and work behaviors that consistently surpass expectations.</td>
<td>- Viewed as a role model for behavior consistent with the standards of the university.</td>
</tr>
<tr>
<td></td>
<td>- Demonstrates leadership qualities with sustained excellent performance throughout the entire year.</td>
<td>- The work completed and the methods used to obtain results reflect truly outstanding and unique skills.</td>
</tr>
<tr>
<td>4 Above Expectations</td>
<td>- Consistently fulfills performance expectations and frequently exceeds them.</td>
<td>- Frequently exceeds in some areas, meets expectations in others, relative to peers.</td>
</tr>
<tr>
<td></td>
<td>- 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.</td>
<td>- Valuable contributor to department and university success.</td>
</tr>
<tr>
<td></td>
<td>- Is recognized as a top performer.</td>
<td>- Performs with a high level of independence.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Assumes and completes assignments beyond what is normally expected of the position.</td>
</tr>
<tr>
<td>3 Solid Performer</td>
<td>- A strong performer whose performance most often meets the requirements of the job.</td>
<td>- Consistently meets expectations relative to peers.</td>
</tr>
<tr>
<td></td>
<td>- Occasionally, this employee may exceed expectations of the job.</td>
<td>- Meets performance standards and responsibilities with solid, dependable performance.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Consistently achieves the standards for the position and may occasionally exceed expectations.</td>
</tr>
<tr>
<td>2 Improvement Needed</td>
<td>- Performance which leaves room for improvement.</td>
<td>- Inconsistent or unsatisfactory performance in some areas, meets expectations in others.</td>
</tr>
<tr>
<td></td>
<td>- 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.</td>
<td>- Contribution to the department needs improvement or is unsatisfactory at times.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Failed to meet performance standards.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Requires significant direction or guidance in carrying out responsibilities. Immediate improvement is essential.</td>
</tr>
<tr>
<td>1 Unsatisfactory</td>
<td>- Consistent work performance results that are unsatisfactory and below the basic requirements and expectations of the position.</td>
<td>- Consistently unsatisfactory performance; performance results are below those of most others.</td>
</tr>
<tr>
<td></td>
<td>- Failure to demonstrate significant improvement requires immediate review and corrective action to address performance and/or behavioral deficiencies.</td>
<td>- Contribution to the department or university is unsatisfactory most of the time.</td>
</tr>
<tr>
<td></td>
<td>- Possible separation of employment may be required.</td>
<td>- Immediate improvement is essential.</td>
</tr>
</tbody>
</table>