

# Performance Management

Presented by:

Marie Kuehler, Sr. HR Business Partner

# Agenda

- Performance Timeline
- Performance Management Cycle
- ePerformance System Introduction - Goals
- Training and Other Resources



# Performance Timeline



<b>When?</b>	<b>What happens?</b>	<b>Who does it?</b>
September – October timeframe	Define and write GOALS	Employee and Manager together
Mid- to Late-October (at the latest)	Enter GOALS into ePerformance in PeopleSoft	Employee
By October 31 (this year only, Nov. 7)	Approve GOALS	Manager
Throughout the year	Monitor, evaluate, communicate, enter information, upload documents	Both Employee and Manager
February – March timeframe	Mid-Year Check-in	Both Employee and Manager
By August 31 <sup>st</sup>	Complete a SELF-EVALUATION	Employee
Early September	Complete performance evaluation on the employee	Manager
Early- to Mid-September	One-on-one meeting to discuss	Employee and Manager together
Late September	Acknowledge receipt of the evaluation; employee may include comments	Employee
September 30 <sup>th</sup> deadline	Complete performance evaluation	Manager with Next Level Manager

# ePerformance System

## Introduction

### Goals

# ePerformance - Goals

**Employee Self Service** **Performance**

Employee Name  
TRAINER & INSTRUCTIONAL DESIGN

- My Current Documents** (1)
- My Historical Documents
- Evaluations of Others (0)
- Historical Evaluations of Others

### My Current Documents

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Performance Evaluation	Define Criteria	09/01/2020 08/31/2021	10/31/2020 >

# ePerformance - Goals

**Performance Process** Performance Process

**Steps and Tasks**

- Employee Name  
UTSA Performance Evaluation  
09/01/2020 - 08/31/2021 [Overview](#)
- Goal Setting**  
Due Date 10/31/2020  
**Update**
- Complete Self Evaluation  
Due Date 09/14/2021
- Review Manager Evaluation  
Due Date 10/15/2021

**UTSA Performance Evaluation**

### Define Criteria - Update

[Print](#) | [Notify](#) | [Export](#)

<b>Employee Name</b>	<b>Job Title</b>	TRAINER & INSTRUCTIONAL DESIGN	<b>Manager</b>	<b>Manager Name</b>
<b>Document Type</b>	UTSA Performance Evaluation		<b>Period</b>	09/01/2020 - 08/31/2021
<b>Template</b>	Individual Contributor: FY2021		<b>Document ID</b>	10727
<b>Status</b>	In Progress		<b>Due Date</b>	10/31/2020

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.  
2. Once you have completed this step select the notify button to email your manager.

▼ **Section 1 - Goals**

**Add Item**

▼ **Audit History**

Created By	Tymeeka Middleton	09/23/2020 10:42:10AM
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# ePerformance - Goals

**Performance Process** UTSA Performance Evaluation

**Steps and Tasks**

- Employee Name  
UTSA Performance Evaluation  
09/01/2020 - 08/31/2021 [Overview](#)
- Goal Setting**  
Due Date 10/31/2020  
**Update**
- Complete Self Evaluation  
Due Date 09/14/2021
- Review Manager Evaluation  
Due Date 10/15/2021

**Define Criteria - Update**

Employee Name

Job Title	TRAINER & INSTRUCTIONAL DESIGN	Manager	Manager Name
Document Type	UTSA Performance Evaluation	Period	09/01/2020 - 08/31/2021
Template	Individual Contributor: FY2021	Document ID	10727
Status	In Progress	Due Date	10/31/2020

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.  
2. Once you have completed this step select the notify button to email your manager.

**Section 1 - Goals**

Expand | Collapse | Add Item

**Articulate Storyline Online Learning Module**

**Description :** Learn Articulate Storyline software in order to develop online learning and create from scratch at least one new online learning module for UTSA employees by the end of August 2021.

**Measurement :** The creation of one new online learning module, effective and well received by UTSA employees

- Reminder Date : 12/15/2020
- Due Date : 08/31/2021
- Critical: No
- Stretch Goal: No
- Start Date : 09/01/2020
- End Date : 08/31/2021

Print | **Notify** | Export

Save



# ePerformance - Goals

**Performance Process**

**Steps and Tasks**

Employee Name  
UTSA Performance Evaluation  
09/01/2020 - 08/31/2021 [Overview](#)

**Goal Setting**  
Due Date 10/31/2020  
[Update](#)

**Complete Self Evaluation**  
Due Date 09/14/2021

**Review Manager Evaluation**  
Due Date 10/15/2021

**Performance Process**

Please enter your email message and select the the send button.

**To**

**Subject** This is a notification regarding the UTSA Performance Evaluation for Employee Name

**Message Text**

254 characters remaining

[Send](#) [Cancel](#)


# ePerformance - Goals

▼ Manager Self Service

Employee Self Service **1**

Manager Self Service

Team Performance **2**



Manager Self Service **Team Performance**

Current Documents

Historical Documents

View-Only Documents

Approve Documents

**3**

Name / Job Title	Document Type	Document Status
John Smith RESEARCH SCIENCE ASSOCIATE II	UTSA Performance Evaluation	Define Criteria

# ePerformance - Goals

The screenshot shows the 'Performance Process' interface for 'UTSA Performance Evaluation'. The left sidebar lists steps: 'Goal Setting' (highlighted), 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main content area is titled 'Define Criteria - Update and Submit' and includes a table with the following details:

Job Title	RESEARCH SCIENCE ASSOCIATE II	Manager	Carl Davis
Document Type	UTSA Performance Evaluation	Period	02/26/2020 - 02/28/2020
Template	2019 Supervisor Evaluation	Document ID	7845
Status	In Progress	Due Date	05/29/2019

Below the table, there are three numbered instructions:

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the submit button to complete this step.

At the bottom, there is a section for 'Section 1 - Goals' with a count of 4, containing 'Goal 1 - Supervisor Certification' and 'Goal 2 - Complete Manager Training 2'.

This close-up shows the 'Save' and 'Submit' buttons, both highlighted with a red border. Below them are links for 'Print', 'Notify', and 'Export'.

This close-up shows a dialog box titled 'Submit Performance Criteria'. It contains the text: 'Select confirm to submit and complete the Define Criteria Step.' Below the text are 'Confirm' and 'Cancel' buttons, with the 'Confirm' button highlighted by a red border.

The screenshot shows the 'Performance Process' interface after the 'Define Criteria' step. The 'Goal Setting' step is now marked as complete with a green checkmark. The main content area is titled 'Confirmation - Performance Criteria Approved' and displays a green checkmark with the message: 'You have successfully approved and completed the Define Criteria Step.'

# Performance Management Training

# Performance Management Website

[Performance Management](#) website live October 1<sup>st</sup>

Performance Management Timeline and Updates

Performance Management Training Guide

ePerformance Training and Quick Reference Guides

Live Training Info and On-Demand Training videos

HOP 3.03

Communication and FAQs

**People Excellence**

- Home
- Employee Transition Resources
- HR COVID-19 Updates
- Benefits
- Compensation
- HR Business Partner
- Leave Administration
- Performance Management**
- Talent Acquisition
- Training and Development
- Wellness
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**My UT Benefits**

**ROWDY NEW U**

**Performance Management**

**PERFORMANCE TIMELINE**  
The annual cycle begins on Sept. 1, and goes through the following phases:

Date	Event
AUG 31	Performance Deadline
SEPT 1-30	Review Performance
NOV 7	Employee Goals Due
FEB - MAR	Mid-Year Check-In
AUG 31	Complete Self/Manager Evaluation

Performance management is a combination of employee development and performance management based on the UTSA Competency Model. It encourages communication between the manager and employee by providing coaching, development and effective feedback throughout the fiscal year. This communication process includes clarifying expectations, setting goals and reviewing results. Goals and objectives are discussed throughout the year, during check-in meetings. This provides a framework to ensure employees achieve results through coaching and mutual feedback. For questions or additional assistance, email [Talent Management](#).

[Using ePerformance](#)

# Training Documents Available

- [UTSA Performance Management Training Guide](#)
- Breakdown of Competencies and Core Values
- Rating Scale Definitions
- Training Plan and Details
- [Employee Self-Evaluation Individual Contributor](#) – Job Aid
- [Employee Self-Evaluation Individual Contributor](#) – Quick Reference Guide
- [Employee Self-Evaluation People Leader](#) – Job Aid
- [Manager Evaluation](#) – Job Aid
- [Manager Evaluation](#) – Quick Reference Guide
- [Next Level Manager](#) – Job Aid
- [Next Level Manager](#) – Quick Reference Guide
- SMART Goals guide

UTSA People Excellence

## Performance Management Training Guide

# QUESTIONS?

