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

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

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

Introduction

Goals
## ePerformance - Goals

### My Current Documents

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Document Status</th>
<th>Period Begin / Period End</th>
<th>Next Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTSA Performance Evaluation</td>
<td>Define Criteria</td>
<td>09/01/2020 / 08/31/2021</td>
<td>10/31/2020</td>
</tr>
</tbody>
</table>
ePerformance - Goals
ePerformance - Goals

Section 1 - Goals

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: 05/01/2020
- End Date: 08/31/2021
ePerformance - Goals

Performance Process

Steps and Tasks

Employee Name

UTSA Performance Evaluation
08/01/2020 - 08/31/2021

- Goal Setting
  Due Date: 10/31/2020
  Updates:
- Complete Self Evaluation
  Due Date: 09/14/2021
- Review Manager Evaluation
  Due Date: 10/15/2021

Overview

Please enter your email message and select the send button.

To: Your Manager's email will auto-fill here

Subject: This is a notification regarding the UTSA Performance Evaluation for

Message Text

254 characters remaining

Send

Cancel

Office of People Excellence
# ePerformance - Goals

<table>
<thead>
<tr>
<th>Name / Job Title</th>
<th>Document Type</th>
<th>Document Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>UTSA Performance Evaluation</td>
<td>Define Criteria</td>
</tr>
</tbody>
</table>

## Team Performance

- [View Documents](#)
ePerformance - Goals

Define Criteria - Update and Submit

John Smith

Actions:
- Add
- Expand
- Collapse
- Add Item

Job Title: RESEARCH SCIENCE ASSOCIATE II
Manager: Carl Davis
Document Type: UTSA Performance Evaluation
Period: 02/20/2020 - 02/20/2023
Template: 2019 Supervisor Evaluation
Document ID: 7845
Status: In Progress
Due Date: 02/20/2020

Section 1 - Goals

- Expand
- Collapse
- Add Item

Goal 1: Supervisor Certification
Goal 2: Complete Manager Training 2

Submit Performance Criteria

Select confirm to submit and complete the Define Criteria Step.

Confirm | Cancel

UTSA Performance Evaluation

Confirmation - Performance Criteria Approved

You have successfully approved and completed the Define Criteria Step.
Performance Management Training
Performance Management Website

**Performance Management** website live on October 1st

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
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
QUESTIONS?