Overview/Description

This document provides step-by-step instructions on how to **Define Criteria** for your employees on the Performance Process page. This page is used to define criteria such as **Goals** and **Job Duties** for USG Institutions. Please note that Performance Factors and USG Core Values/Institutional Values are either loaded from the Non-Person Profile (NPP) if those values are found on the profile, or from the template (if those values aren't on the profiles.) It is recommended to create goals for the employee prior to completing an annual assessment document.

Prerequisite(s)

Evaluations have to be generated by the institution ePerformance Administrator.

Instructions

1. Step

Define Criteria for Performance Process Page

1.1. Sub step

During this step the Manager and Employee should identify goals, define core responsibilities and competencies that need to be accomplished during the performance period.

Navigation

Manager Self Service > Team Performance > Current Documents

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a. Employee(s)will have document type listed in **Current Documents** page. Please note that an employee can have multiple documents, so carefully select the document that matches the desired evaluation period.

b. Select an employee from the grid, and the system will navigate to the **Performance Process** page, **Define Criteria.**

c. **Define Criteria** section tabs are **Goals**, **Job Duties**, **Performance Factors** and **USG Core Values**. Each section has a percentage weight and each section can be expanded or collapsed.

Please note that the Job Duties will load from the employee's NPP, and if an NPP isn't found, t
section will be blank, and duties will need to be added manually by the manager.

The USG Core Values can be combined with the institutional Values if found on the NPP,
otherwise the USG Core Values are loaded from the template.

Goals tab

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==Performance Factors== tab

< Team Performance | Performance Process

Performance Process ⚙ «
Steps and Tasks 🔄 ⚙▾

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USG Annual Review for Leaders
06/01/2021 - 12/31/2022   Overview

▾ ● Define Criteria
    Due Date   11/19/2022
    ● Update and Approve

▶ ○ Checkpoint 1
    Due Date   12/01/2022

▶ ○ Finalize Criteria
    Due Date   12/01/2022

▶ ○ Nominate Participants
    Due Date   12/31/2022

▶ ○ Review Participant Evaluations
    Due Date   12/01/2022

▶ ○ Review Self Evaluation
    Due Date   12/01/2022

▶ ○ Complete Manager Evaluation
    Due Date   12/01/2022

USG Annual Review for Leaders
Define Criteria - Update and Approve

| Goals | Job Duties | Performance Factors | USG Core Values |

▾ Section 3 - Performance Factors

Performance Factors will be evaluated by: Employee, Manager, Other
⊕ Expand | ⊕ Collapse

▶ Communication
▶ Customer Service
▶ Initiative
▶ Innovation
▶ Job Knowledge
▶ Adherence to University Policies
▶ Quality of Work
▶ Interpersonal Relationships
▶ Reliability/Attendance
▶ Critical Thinking

▾ Performance Factors Summary
        Section Weight 25 % (not less than 25%)

▾ Audit History
        Created By Amy Phillips   11/22/2021 6:47:46AM

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< Team Performance   Performance Process

Performance Process   ⚙ ⟨   USG Annual Review for Leaders
Steps and Tasks   ↻ ⚙▾   Define Criteria - Update and Approve

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USG Annual Review for Leaders
06/01/2021 – 12/31/2022   Overview | Goals | Job Duties | **Performance Factors** | USG Core Values |

▾ ● Define Criteria   ▾ Section 3 - Performance Factors
     Due Date   11/18/2022
                                        Performance Factors will be evaluated by: Employee, Manager, Other
        ● Update and Approve
                                        ▾ Expand | ▸ Collapse

▸ ○ Checkpoint 1   ▣ Communication
     Due Date   12/01/2022
                                        Description : The extent to which employee is proficient and professional in oral and written communication. This includes listening,
▸ ○ Finalize Criteria   understanding, remembering, and following oral or written instructions; asking for clarification when necessary and providing information to
     Due Date   12/01/2022   others in a clear, complete and concise manner.

▸ ○ Nominate Participants
     Due Date   12/31/2022
                                            Created by Template   11/22/2021 6:47AM
▸ ○ Review Participant Evaluations
     Due Date   12/01/2022   ▸ Customer Service

▸ ○ Review Self Evaluation   ▸ Initiative
     Due Date   12/01/2022
                                        ▸ Innovation
▸ ○ Complete Manager Evaluation
     Due Date   12/01/2022   ▸ Job Knowledge

                                        ▸ Adherence to University Policies

                                        ▸ Quality of Work

                                        ▸ Interpersonal Relationships

                                        ▸ Reliability/Attendance

                                        ▸ Critical Thinking

                                        ▾ Performance Factors Summary

                                                 Section Weight 25 % (not less than 25%)

USG Core Values tab

Institutional Values

As mentioned above, the Institutional Values can be combined with the USG Core Values (or can replace them.) The resulting set of values will appear on the USG Core Values tab.

d. Once Manager has **Defined** the **Criteria**, they approve criteria by clicking on approve. This wil indicate completion of the Define Criteria phase.

Select Confirm to Approve Performance Criteria and the Define Criteria Step is completed.

Note the confirmation message from the system to inform the manager the step has been complete

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< Team Performance   Performance Process

Performance Process   ⚙ «

Steps and Tasks   ↻ ⚙▼

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USG Annual Review for Leaders
06/01/2021 – 12/31/2021   [Overview]

▶ ✅ Define Criteria
     Due Date   11/16/2021

▶ ⚪ Checkpoint 1
     Due Date   12/01/2021

▶ ⚪ Finalize Criteria
     Due Date   12/01/2021

▶ ⚪ Nominate Participants
     Due Date   12/31/2021

▶ ⚪ Review Participant Evaluations
     Due Date   12/01/2021

▶ ⚪ Review Self Evaluation
     Due Date   12/01/2021

▶ ⚪ Complete Manager Evaluation
     Due Date   12/01/2021

USG Annual Review for Leaders
Confirmation - Performance Criteria Approved

✅ You have successfully approved and completed the Define Criteria Step.