



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





- 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.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Orie Thornton Manager III	USG Provisional Review	Approval - Submitted	08/22/2019 08/31/2019	08/22/2019
Orie Thornton Manager III	USG Annual Review for Staff	Evaluation in Progress	08/02/2019 08/31/2019	08/02/2019
Orie Thornton Manager III	USG Annual Review for Staff	Evaluation in Progress	08/01/2019 08/31/2019	08/01/2019
Jasmin Forts Manager III	USG Annual Review for Leaders	Evaluation in Progress	01/01/2019 12/31/2019	12/01/2019
Orie Thornton Manager III	USG Annual Review for Staff	Evaluation in Progress	01/01/2019 12/31/2019	12/01/2019
Lindsey Seipel Employee Relations Manager	USG Annual Review for Staff	Evaluation in Progress	01/01/2019 12/31/2019	12/01/2019
Jasmin Forts Manager III	USG Annual Review for Staff	Track Progress - Checkpoint 1	01/01/2019 11/01/2019	11/01/2019

- 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, this 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.

The screenshot displays the 'Define Criteria - Update and Approve' interface for 'Cynthia Burton'. The sidebar on the left lists the following steps and tasks:

- Define Criteria (Due Date: 11/15/2022) - **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)

The main content area shows the 'USG Annual Review for Leaders' document details:

- Job Title: Manager, Benefits
- Document Type: USG Annual Review for Leaders
- Template: Annual Review for Leaders
- Status: In Progress
- Manager: Amy Phillips
- Period: 05/01/2021 - 12/31/2022
- Document ID: 7596
- Due Date: 11/15/2022

Instructions for this step:

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 approve button to complete this step.

The 'Goals' tab is selected, and the 'USG Core Values' sub-tab is active. The 'Section 2 - Job Duties & Knowledge' section is expanded, showing 'Job Duties & Knowledge will be evaluated by: Employee, Manager, Other' and an 'Add Item' button. Below this is the 'Job Duties & Knowledge Summary' section with a 'Section Weight' of 25% (not less than 25%). The 'Audit History' section shows it was created by Amy Phillips on 11/22/2021 at 8:47:48AM.

Goals tab

The 'Goals' tab interface shows the following sections:

- Goals | Performance Factors | USG Core Values | Institutional Values
- Section 1 - Goals
- Add Item
- Goals Summary
 - Section Weight: 25 %
- Audit History
 - Created By: Amy Phillips
 - Date: 07/31/2019 3:21:57PM



Performance Factors tab

The screenshot displays the 'Performance Process' interface for 'USG Annual Review for Leaders'. The main heading is 'Define Criteria - Update and Approve'. Below this, there are tabs for 'Goals', 'Job Duties', 'Performance Factors', and 'USG Core Values'. The 'Performance Factors' tab is active, showing a section titled 'Section 3 - Performance Factors'. A note indicates that performance factors will be evaluated by 'Employee, Manager, Other'. A list of factors is shown, each with a dropdown arrow: Communication, Customer Service, Initiative, Innovation, Job Knowledge, Adherence to University Policies, Quality of Work, Interpersonal Relationships, Reliability/Attendance, and Critical Thinking. Below this list is a 'Performance Factors Summary' section with a 'Section Weight' of 25% (not less than 25%). At the bottom, an 'Audit History' section shows the record was created by Amy Phlips on 11/22/2021 at 8:47:40AM.



Team Performance
Performance Process

Performance Process

Steps and Tasks

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

- Define Criteria
Due Date: 11/18/2022
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

Description: The extent to which employee is proficient and professional in oral and written communication. This includes listening, understanding, remembering, and following oral or written instructions; asking for clarification when necessary and providing information to others in a clear, complete and concise manner.

Created by: Template 11/22/2021 6:47AM

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

Performance Factors Summary

Section Weight: % (not less than 25%)

USG Core Values

 tab



Team Performance
Performance Process

Performance Process

Steps and Tasks

Cynthia Burton
USG Annual Review for Leaders
09/01/2021 - 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: 12/01/2022
- 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

Template: Annual Review for Leaders
Status: In Progress

Document ID: 7596
Due Date: 11/18/2022

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 approve button to complete this step.

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

Section 4 - USG Core Values

USG Core Values will be evaluated by: Employee, Manager, Other

Expand | Collapse

Accountability

Description: We firmly believe that education in the form of scholarship, research, teaching, service, and developing others is a public trust. We will live up to this trust through safeguarding our resources and being good stewards of the human, intellectual, physical, and fiscal resources given to our care.

Created By: Template 11/22/2021 8:47AM

Excellence

Integrity

Respect

USG Core Values Summary

Section Weight: 25% (not less than 25%)

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 will indicate completion of the Define Criteria phase.



The screenshot shows the 'Performance Process' interface for 'Define Criteria - Update and Approve'. The left sidebar lists various steps: 'Define Criteria' (selected), 'Checklist 1', 'Finalize Criteria', 'Approve Participant Evaluations', 'Review Self-Evaluations', and 'Complete Manager Evaluation'. The main content area shows details for 'Cynthia Burton', including her job title 'Manager, Benefits', document type 'USG Annual Review for Leaders', and manager 'Amy Phillips'. A red arrow points to the 'Approve' button in the top right corner.

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

The screenshot shows a dialog box titled 'Approve Performance Criteria'. The text inside reads: 'Select confirm to approve and complete the Define Criteria Step.' Below the text are two buttons: 'Confirm' and 'Cancel'. A red arrow points to the 'Confirm' button.

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



[← Team Performance](#) Performance Process

Performance Process USG Annual Review for Leaders

Steps and Tasks Confirmation - Performance Criteria Approved

Cynthia Burton
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

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