HR Performance Solutions

Employee Help Guide
Employee self-appraisals can be completed easily and quickly by following the steps outlined below. If you have questions or have difficulty accessing the program, please contact your Human Resource Department.

**To log in to Performance Pro:**
1. Access UT4U [http://www.utsystem.edu/ut4u/homepage.htm](http://www.utsystem.edu/ut4u/homepage.htm)
2. Navigate to Resources/Employee Services/ Performance Management (the link will also appear under Announcements temporarily)
3. Select The University of Texas System Administration as your home institution
4. Enter your SNAC login and password
5. Press Enter on your keyboard or click the Login button
To begin your evaluation:

**Completing a Self-Appraisal**

**STEP 1: Evaluate Factors**

1. From the *Main Menu*, under *Appraisal*, click **Evaluate Factors**. If your name is not shown at the top of the page select it from the employee list box.
2. Select a factor to evaluate from the *Available Factors* box.

3. Evaluate yourself on the factor. Select the rating that reflects your performance by moving the scoring bar in the scoring box, clicking on the scoring bar at the appropriate level, or selecting the Performance Level Description (the level’s number will automatically be assigned as the rating).
4. Comment on the factor (if desired) by scrolling down to the Employee *Comments* box below the rating scale and typing your comment.
5. Click **Spell Check** and/or **Language Check** to review your text.
6. Click the Next factor to move to the applicable factor.
7. Repeat steps 2-7 until all factors have been evaluated.
8. Factors you have evaluated are indicated by a green check mark in front of the factor.
Step 2: Evaluate Goals (if applicable)

1. From the Main Menu, under Appraisals, click Evaluate Goals. (Note that the term “goal” may have been customized.)

2. Select a goal to evaluate from the Goals window. Evaluate yourself on the goal. Select the rating that reflects your performance by moving the scoring bar in the scoring box, clicking on the scoring bar at the appropriate level, or selecting the Level Description (the level’s number will automatically be assigned as the rating).

3. Comment on each goal (if desired) by either clicking Enter/Review Comments or scrolling down to the Comments box below the rating scale and typing your comment.

4. Click Spell Check and/or Language Check to review your text.

5. Click the next goal in the menu to move to the next one, or use the dropdown arrow and click on the desired goal from the Goals window. Repeat steps 2-6 until all goals have been evaluated.
6. Goals you have evaluated are indicated with green text and a dot for comments that were entered. Goals that are not yet evaluated will show with only black text.

Prior to evaluating on the overview tab. View after goal has been evaluated.

Step 3: Set New Goals for the Future (if applicable)
1. From the Main Menu, under Employee Documents, click Employee Goal Tool, Future Goals Tab.
2. Click the Add New button.
3. Enter a new goal title, suggested weight, and suggested due date. Note: The total weight of all goals must equal 100%.
4. Enter a detailed description of the goal in the Description box.
5. Click **Save**. (Note: Your Manager may already have entered some goals. You may add to those.)

6. If desired, add specific goal action steps by clicking Add New Goal Action Step. A window will open to enable you to Enter a title, due date, and description for each of the action steps. Then click select to save the action step.

7. Repeat steps 2-6 until all goals have been entered.
8. All goals and their weights are finalized by your Manager.

**Step 4: Summary Comments and Ready for Meeting**

1. From the **Main Menu**, under **Appraisals**, click **Summary Comments**. Click in the **Summary Comments** box and enter any additional information, concerns, etc. (if desired). Enter information in any additional comment fields appearing on this screen.
2. Click **Spell Check** and/or **Language Check** to review your text.
3. If you wish to view the self-appraisal before you mark it ready, click the View Current Appraisal link or go the Home Page and select the Current Appraisal button. The appraisal may also be printed from these screens.

4. The Appraisal Checklist is listed below the Mark Ready button. Make sure all factors and goals have been evaluated (evaluated items are indicated by a “checked” box). If you haven’t, go back to the appropriate screen. Comments are optional.

5. From the Main Menu, under Appraisals, click Finish Appraisal and then click the Ready Tab (Note: The term “Ready for Meeting” may have been customized.) Right under the ready tab you will see an orange box that indicates to Mark Ready. Click the “Mark Ready” button to mark your appraisal ready for meeting.

WARNING: THIS IS YOUR LAST CHANCE TO MAKE CHANGES.
Once you mark the appraisal as ready you may not change it.

6. When you are finished, from the Ready for Meeting screen, check the Ready for Meeting button.

YOU HAVE COMPLETED YOUR SELF-APPRaisal!

7. Click Exit & Log Out on the Main Menu.

Step 5: E-Signing the Appraisal (if applicable)

1. If you are required to sign an appraisal, from any screen, click Home in the upper left hand corner.

2. In the “To Be Signed” widget, click the appropriate Appraisal link.

3. Under the E-Signature heading at the bottom of the appraisal, click Sign.

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4. Then you will have the option to select the “I agree” or the “I disagree” radio button.

5. Select the Check this box to sign this document electronically checkbox.
6. Click Save.
7. To exit the system, click Exit & Log Out.

Other Features

Writing a Self Note
You can leave a note to remind yourself of your activities, progress in achieving your goals, meeting factor standards, or anything else related to your performance.

To add a note:
1. From the Main Menu, click Home.
2. Under Employee Notes click Add Note.
3. Enter the appropriate date, a title for your note, and then begin typing your text in the Note Detail field.
4. Click Spell Check and/or Language Check to review your text.
5. Click Save.
To edit or delete a note:

1. From the Main Menu, click Home.
2. Click the Note title that you want to change. Make your changes and then click Save in the top toolbar.
3. To delete a note, click the Delete button next to the appropriate note, then click OK to indicate that you are sure you want to make the deletion. The note is permanently deleted.

Viewing Your Current Appraisal

To view your current appraisal:

1. From the Main Menu, click Home.
2. Click Current Appraisal. You may view your assigned factors and goals and your self-appraisal scores. Completed appraisals, which include the appraiser’s scores, cannot be viewed from this screen.