























ANNUAL PERFORMANCE APPRAISAL CHECKLIST FOR EMPLOYEES

Preparing for Annual Appraisals		
<input type="checkbox"/>	Annual Appraisal Process Training for Employees	
Getting Started		
<input type="checkbox"/>	Accessing your appraisal form	
<input type="checkbox"/>	<p>Update your <u>internet browser settings</u> to add SuccessFactors as a trusted site and enable Pop-ups for SuccessFactors. Perform2Achieve is powered by SuccessFactors.</p> <p> Note: you must update your internet browser settings to be able to add goals to an appraisal form, print a form or save a form as a PDF document.</p>	
	Employee Review – due 8/29	
	UTHealth Performance Standards	
<input type="checkbox"/>	Rate and enter comments	
<input type="checkbox"/>	Use “Writing Assistant” (Optional)	
	Performance Goals	
<input type="checkbox"/>	Verify performance goals in form	
<input type="checkbox"/>	Add goal(s) if needed	
<input type="checkbox"/>	Update goal status and details if needed	
<input type="checkbox"/>	Rate and enter comments/results	
	Employee Overall Summary of Performance	
<input type="checkbox"/>	Enter overall summary (Optional)	
<input type="checkbox"/>	Print appraisal form (Optional)	
<input type="checkbox"/>	Click on “Save and Send to Manager Review”	
	<p> Note: all forms still in the Employee Review step on 8/30 will automatically be moved to the Manager Review step</p>	

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Manager Review		
	Manager enters comments and ratings	
	Manager sends appraisal to Discussion step	
Discussion		
<input type="checkbox"/>	Meet with manager to discuss performance and next year's performance and development goals	
<input type="checkbox"/>	Manager sends appraisal to Employee Signature step Tip: The Employee will receive an email notification in their UTHealth Outlook inbox that the form is ready for their signature.	
Employee Signature		
<input type="checkbox"/>	Sign appraisal form	
Manager Signature – due 9/26		
	Manager signs appraisal form	
Creating a New Performance Goal Plan		
<input type="checkbox"/>	Access next year's performance goal plan	
<input type="checkbox"/>	Enter new goals	
<input type="checkbox"/>	Copy a goal from previous year, if applicable	
Creating a New Development Plan		
<input type="checkbox"/>	Access next year's development plan	
<input type="checkbox"/>	Enter new goals	
<input type="checkbox"/>	Add learning activities (Optional)	