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, Performance Factors, USG Core Values, and Institutional Values for USG Institutions. It is recommended to create overall goals for the employee prior to completing an annual assessment document.

Prerequisite(s)

Evaluations have to be generated

Instructions

1. Define Criteria for Performance Process Page

1.1. 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
b. Select employee to navigate to the **Performance Process** page to **Define Criteria**

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

d. The only section tab where an item can be added is **Goals**, while all of the other tabs are predefined such as **Performance Factors**, **USG Core Values**, and **Institutional Values**:

**Goals** tab
Performance Factors tab

<table>
<thead>
<tr>
<th>Goals</th>
<th>Performance Factors</th>
<th>USG Core Values</th>
<th>Institutional Values</th>
<th>Ethics Compliance</th>
<th>Professional Development</th>
<th>Final Remarks</th>
<th>Overall Summary</th>
</tr>
</thead>
</table>

**Section 2 - Performance Factors**

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

**Attachments**
No Attachments have been added to this document

**Audit History**

- Created By [Redacted] 08/14/2019 12:29:08PM
- Last Modified By [Redacted] 08/14/2019 12:56:35PM
### Section 2 - Performance Factors

<table>
<thead>
<tr>
<th>Goals</th>
<th>Performance Factors</th>
<th>USG Core Values</th>
<th>Institutional Values</th>
</tr>
</thead>
</table>

#### 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
- Date: 07/31/2019 3:21PM

#### Customer Service
**Description:** The extent to which the employee provides a customer friendly environment and superior service to clients, patients, co-workers, supervisors, subordinates, faculty and students. The employee resolves customer needs with confirmed satisfaction, responsiveness, and outcomes.

- Created By: Template
- Date: 07/31/2019 3:21PM

#### Initiative
**Description:** The extent to which employee is a self-starter, shares new ideas for doing things, and is willing to assume additional duties when necessary. Displays positive attitude and willingness to improve both personally and professionally in a constantly changing environment.

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- Date: 07/31/2019 3:21PM

#### Innovation
**Description:** The extent to which the person is receptive to new ideas and has the ability to adjust to change with minimum disruption to productivity. Contributes useful ideas for improved performance.

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- Date: 07/31/2019 3:21PM

#### Job Knowledge
**Description:** The extent to which employee understands their job duties and responsibilities and applies the practical and technical knowledge and skills required for the position.

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- Date: 07/31/2019 3:21PM

#### Adherence to University Policies
**Description:** The extent to which the person follows system, college/university and department-specific policies and procedures (dress guidelines, professionalism, administrative policies & procedures).

- Created By: Template
- Date: 07/31/2019 3:21PM

#### Quality of Work
**Description:** The extent to which employee's work is consistently accurate, thorough, and is accomplished in a professional manner. Employee works efficiently and productively while effectively managing resources (labor, time, materials, etc.).

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- Date: 07/31/2019 3:21PM
USG Core Values tab

Section 3 - USG Core Values

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.

Excellence
Description: We will perform our duties to foster a culture of excellence and high quality in everything we do.

Integrity
Description: We will be honest, fair, impartial, and unbiased in our dealings both with and on behalf of the USG.

Respect
Description: We recognize the inherent dignity and rights of every person, and we will do our utmost to fulfill our resulting responsibility to treat each person with fairness, compassion, and decency.

USG Core Values Summary
Section Weight: 25

Audit History
Created By: [Redacted] 07/31/2019 3:21PM
Institutional Values tab

<table>
<thead>
<tr>
<th>Goals</th>
<th>Performance Factors</th>
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</table>

**Section 4 - Institutional Values**

- Elevational
- Impact Generating
- Open
- Promise Fulfilling
- Student Inspired
- True to Ourselves

**Attachments**

No Attachments have been added to this document.

**Add Attachment**

**Audit History**

- Created By [Redacted] 08/14/2019 12:29:06PM
- Last Modified By [Redacted] 08/14/2019 12:59:35PM
### Section 4 - Institutional Values

<table>
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<tr>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Evelational</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description: Raising trajectory, chasing, creating, pursuing, building.</td>
<td></td>
<td>07/31/2019 3:21PM</td>
</tr>
<tr>
<td><strong>Impact Generating</strong></td>
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<tr>
<td>Description: Delivering a difference, impacting individuals and communities for positive change.</td>
<td></td>
<td>07/31/2019 3:21PM</td>
</tr>
<tr>
<td><strong>Open</strong></td>
<td></td>
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</tr>
<tr>
<td>Description: Embracing the true power of openness, valuing and leveraging diverse perspectives to find better solutions and gain an edge.</td>
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<td>07/31/2019 3:21PM</td>
</tr>
<tr>
<td><strong>Promise Fulfilling</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description: Being committed and ready, making promises we can keep to fuel opportunity for every student and spark economic growth for the region.</td>
<td></td>
<td>07/31/2019 3:21PM</td>
</tr>
<tr>
<td><strong>Student Inspired</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description: Fueling aspiration and delivering pathways that enable students to stretch and strive, embrace a dream and create actionable plans.</td>
<td></td>
<td>07/31/2019 3:21PM</td>
</tr>
<tr>
<td><strong>True to Ourselves</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description: Staying genuine, guided by honesty, intention and purpose, no matter how we change, grow or evolve, never forgetting who we are.</td>
<td></td>
<td>07/31/2019 3:21PM</td>
</tr>
<tr>
<td><strong>Institutional Values Summary</strong></td>
<td></td>
<td></td>
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<td>Section Weight: 25</td>
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</table>
e. Once Manager has **Defined Criteria**, Manager approves criteria by clicking on approve:

![](image1)

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

![](image2)