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. 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
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 Devmt</th>
<th>Final Remarks</th>
<th>Overall Summary</th>
</tr>
</thead>
</table>

- 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

**Add Attachment**

### Audit History

- **Created By**: Karen McDonnell  
  **Last Modified By**: Amy Phillips
  - **Created On**: 08/14/2019 12:29:00PM  
  - **Last Modified On**: 08/14/2019 12:59:35PM
### Section 2 - Performance Factors

#### 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.

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

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#### 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.

**Created By**: Template 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.

**Created By**: Template 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.

**Created By**: Template 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 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.).

**Created By**: Template 07/31/2019 3:21PM
## USG Core Values tab

<table>
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<tr>
<th>Goals</th>
<th>Performance Factors</th>
<th>USG Core Values</th>
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### 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 us.

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**Excellence**

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

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**Integrity**

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

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**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.

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- **Created By**: Karen McDonnell 08/14/2019 12:29:06PM
- **Last Modified By**: Amy Phillips 08/14/2019 12:59:35PM

### Section 3 - USG Core Values Summary

- **Sections Weight**: 25 %

### Audit History

- **Created By**: Amy Phillips 07/31/2019 2:21:57PM
## Institutional Values tab

<table>
<thead>
<tr>
<th>Goals</th>
<th>Performance Factors</th>
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- Elevation
- Impact Generating
- Open
- Promise Fulfilling
- Student Inspired
- True to Ourselves

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**Add Attachment**

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<td>Amy Phillips</td>
<td>08/14/2019 12:29:06PM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>08/14/2019 12:59:35PM</td>
</tr>
</tbody>
</table>
### Section 4 - Institutional Values

#### Elevational
**Description**: Raising trajectory, chasing, creating, pursuing, building.

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

#### Impact Generating
**Description**: Delivering a difference, impacting individuals and communities for positive change.

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

#### Open
**Description**: Embracing the true power of openness, valuing and leveraging diverse perspectives to find better solutions and gain an edge.

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

#### Promise Fulfilling
**Description**: Being committed and ready, making promises we can keep to fuel opportunity for every student and spark economic growth for the region.

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

#### Student Inspired
**Description**: Fueling aspiration and delivering pathways that enable students to stretch and strive, embrace a dream and create actionable plans.

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

#### True to Ourselves
**Description**: Being genuine, guided by honesty, intention and purpose, no matter how we change, grow or evolve, never forgetting who we are.

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

**Institutional Values Summary**

<table>
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- Created By: Amy Phillips 07/31/2019 3:21:57PM
e. Once Manager has **Defined Criteria**, Manager approves criteria by clicking on approve:

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