

# Annual Performance Appraisal - Introduction

The University of Texas at Dallas policy ([UTDBP3091](#)) requires that all classified and administrative and professional (A&P) staff have their job performance formally evaluated on an annual basis. Any A&P, classified, wage, temporary or regular budgeted position employee employed at UT Dallas for more than 4.5 months should be evaluated during the first quarter of each calendar year. The period covered by the annual review should focus on the previous calendar year.

Supervisor and employees should meet and thoroughly discuss the annual review. Upon completion of the performance review meeting, signed copies of the review need to be sent to Human Resources. Employees wishing to add comments to their review may do so and attach to the appraisal document. Employee statements should be provided to their supervisor, with a copy to the Office of Human Resources, within 20 working days of receiving their appraisal. The employee's statement will be filed with the appraisal. According to University Policy, appraisals must be submitted to the Office of Human Resources by the 5<sup>th</sup> working day in April. However, supervisors are encouraged to complete the appraisal as soon as schedule permits after the close of the calendar year.

The following descriptions are provided to assist the supervisor in using the designated rating scale.

- 1. Unsatisfactory (UN)** - Routinely fails to meet expectations. Employee requires a disproportionate amount of supervision. Demonstrates a lack of adequate job knowledge and requisite competencies after sufficient time and training have been received. Performance is at a level below established standards and expectations with the result that their overall contribution is marginal or substandard. *(Comments must cite specific performance/behavioral issues that justify this rating and the disciplinary or performance planning needed to correct it.)*
- 2. Needs Improvement (NI)** - Employee performance does not always meet standards or expectations. Employee requires more than a normal degree of direction and supervision. Some requisite job competencies and knowledge are demonstrated. Individual may still be learning the job and/or functions and requires additional time to develop. Meets most objectives and expectations but definite areas exist where achievement is falling short of being fully successful. *(Goals should address this rating and include standards and expectations that need to be met in order to improve and the process that will be implemented in order for the employee to improve their performance.)*
- 3. Fully Successful (FS)** - Employee fully meets requirements and expectations. Employee requires a normal degree of supervision. Requisite competencies and knowledge are demonstrated. Performance is solid and demonstrates a competent level of skill. Employee's contribution to the success of the team is significant.
- 4. Commendable (CM)** - Performance fully meets and often exceeds requirements and expectations. Employee requires minimum supervision. Performance is strong and demonstrates a high level of skill. Employee's contribution to the success of the team is substantial.
- 5. Exemplary (EX)** - Performance far exceeds all job standards and expectations. Employee requires little or no supervision. Performance regularly approaches the best possible attainment and demonstrates an extraordinary level of skill. Employee's contribution to the success of the team is extensive and consistent. *(Comments should speak to specific examples or performance that justifies this rating for each factor area rated at this level.)*

## Distribution of Completed Appraisal Forms:

- Signed original retained by Supervisor/Manager.
- Signed copy to employee.
- Signed copy to the Office of Human Resources for inclusion in personnel file. (Send all pages, except Introduction page.)

## Assistance Available:

Supervisors are encouraged to take advantage of [annual training](#) and calibration. New or first time supervisors should plan on attending one of these sessions. For consultation or questions about the annual review process at UT Dallas, please contact the Office of Human Resources (972-883-2224).

## Helpful Links:

- [Guidelines for Supervisors](#)
- [Employee Self-Evaluation Tool](#)
- [Office of Human Resources web pages on the annual performance appraisal process](#)



Annual Performance Appraisal- Temporary Employee
(Classified or Administrative & Professional)

Employee Name: \_\_\_\_\_

UTD ID: \_\_\_\_\_

Position Title: \_\_\_\_\_

Department: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Review Date: \_\_\_\_\_

Rating Scale- See introduction page for guidelines on using this performance rating scale.

UN- Unsatisfactory NI- Needs Improvement FS- Fully Successful CM- Commendable EX- Exemplary
Below each competency, there is an area for comments, examples, concerns, and accolades.

Overall Performance Rating for Employee [ ]

Attendance/Punctuality - Demonstrates reliability in being available for work; conforms to work hours, timely attendance at meetings and other work obligations; present at work and on time. Absences are properly scheduled and reported.

[ ]

[ ]

Initiative- Demonstrates interest in generating ideas and taking action to solve problems; makes appropriate decisions about when to act independently and when to consult others; searches for practical solutions, resourceful and versatile in handling assignments; suggests and implements improved work methods, follows through on tasks with little or no reminders.

[ ]

[ ]

Interpersonal Relations- Demonstrates respect for others, including supervisors, subordinates and peers; communicates and relates effectively with coworkers, supervisors and others; uses tact and diplomacy, acts professionally.

[ ]

[ ]

Job Knowledge- Demonstrates understanding of knowledge, skills, processes, equipment operation, procedures and resources necessary to perform the essential functions of the job and work assignments.

[ ]

[ ]

Quality of Work- Demonstrates accuracy, completeness and follow-through of work; delivers work product in a neat and acceptable format; displays pride and professionalism in work.

[ ]

[ ]

Responsibility and Dependability- Demonstrates ownership of assigned work; accepts responsibility for their performance; accepts new assignment; fulfills commitments, meets deadlines and achieves expected results; exercises good judgment according to essential function of the job and the work

[ ]

[ ]

Goals for next annual appraisal process:

[ ]

Immediate Supervisor Date

Employee Date

Next Level Supervisor Date

Any comments by the employee can be attached to this document.