Probationary Review

Manager
# Manager Instructions: Probationary Review

**Checkpoints at 45 & 90 Days and Final Evaluation at 160 Days**

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Overview
The Probationary Review utilizes checkpoints which allow Managers to build upon their feedback throughout the probationary period. Checkpoints will occur at the 45- and 90-day mark. At the 160-day mark, you will complete the checkpoints and begin the probationary review evaluation. Once the evaluation is reviewed and approved by you’re the next level supervisor, you will hold a review meeting with your employee. Once complete, the employee will sign in to acknowledge the evaluation and that a review meeting was held.

The full process should be completed prior to the end of your 6 months probationary period; therefore, the Manager probationary evaluation should be completed at the 160 day to allow time for approval, the review meeting and employee acknowledgement.

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• Employee Sharing Comments notifies Manager
• Manager Completing Checkpoint notifies Employee
• Manager Actions: Share or Skip notifies Employee
• Manager Submitting for Approval notifies the Next Level Supervisor
• Approval notifies Manager
• Manager Sharing Eval notifies Employee
• Employee Acknowledge notifies Manager
• Both notified when complete
Step 1 of 23 – UTShare
Sign in to UTShare. You will be asked to authenticate yourself.

Step 2 of 23 – Manager Self Service
Select the Manager Self Service option from the dropdown from the PeopleSoft homepage.

Step 3 of 23 – Performance Tile
Select the Team Performance tile.

Evaluation available in ‘Historical Documents’
Step 4 of 23 – Current Documents

A list of available Current Documents will appear for your team members. Not all Direct Reports will be listed, only those with a current Probationary Review or Annual Evaluation.

The document type UTSA Probationary Review will differentiate it from any current Annual reviews. Also, the Document Status will provide what checkpoint the document is currently on and update as the steps progress. Select an employee to continue.
Step 5 of 23 – Review and Verify Information

Once the document is opened, you can view the overall document information, the checkpoints and due dates and the document’s instructions. The document instructions will provide helpful reminders on what is expected and what to do next.

The far-left panel **Steps and Tasks** will keep you informed of the current and next steps. Use this to navigate through the sequence of steps.
Step 6 of 23 – Begin Checkpoint #1 at 45 Days
Select the **Expand** link and provide comments on the factors under each tab.

Notice the message within the Employee Comments box. The employees can provide their feedback at any time, even before you share your document with them. This is to mimic the ability of a self-evaluation.

When this message is seen: *Employee’s comments are not shared*: if the Employee has added comments, they have not shared them with you. You will receive an email when the employee shares their comments with you.

Once employee shares their document, you can refresh the page or log in again to see the comments.
Step 7 of 23 – Share Checkpoint #1 Comments with Employee
You’ll notice that while your comments are not shared, you have an action button of **Save / Share with Employee** and also a status at the top of the document that will always let you know whether your comments are shared or private. There is also an option to Skip the checkpoint step. This should not be used.

Once your comments are complete and you’d like to share your comments with your employee, select **Share with Employee** and then Confirm.
Once shared and confirmed, you can refresh the Task Panel and select the Review with Employee link to view the document again.

Step 8 of 23 – During Checkpoint: Review Meeting & Employee Comments
Your employee will receive an email once you share the document with them. You will now schedule a meeting to review. They can provide their feedback before or after the review meeting.

However, you will retain edit ability to your comments while the document is Shared. You can add notes and Save for the employee would be able to refresh the page or log in again to see the updated comments. You also have the option to Stop Sharing to pull the document back to your queue, edit, and then Save/Share with Employee again.

Step 9 of 23 – During Checkpoint: After Employee Comments Shared
When the employee shares their comments with you, you will receive an email. However, their feedback is not necessary to move forward and complete the checkpoint.
Step 10 of 23 – Completing the Checkpoint

When the checkpoint is complete and no further action is needed, select **Complete Checkpoint**.

Step 11 of 23 – Checkpoint #1 at 45 Days Complete

No further action is required until the next checkpoint at 90 Days but you do have the ability to add and save notes within the document until the next checkpoint occurs.
Step 12 of 23 – Checkpoint #2 at 90 Days

Checkpoint #2 will be an exact repetition of Checkpoint #1, Steps 1 – 11. The only difference is that the comments from Checkpoint #1 are automatically added to Checkpoint #2.

You can simply add more comments, separate your comments by colored font or bullet points to differentiate between Checkpoint #1 and #2, or delete everything and start fresh. The comments for Checkpoint #1 will always be separate and available to view by expanding the Checkpoint steps within the document and selecting View.
Step 13 of 23 – Checkpoint #3 at 160 Days – Finalize & Complete

Checkpoint #3 and the final Probationary Review are combined. This step is to finalize any comments prior to beginning the evaluation OR utilize it as a way to gather your employee’s feedback prior to the final evaluation. However, you can immediately move past Checkpoint 3 to begin the evaluation.

If you decide to gather your employee’s feedback prior to the final evaluation, you can Share with the Employee to alert them it’s time to log in and provide their feedback.

Once you select Complete and confirm, you can refresh the Task Panel and then select Update and Submit to open the evaluation.
Step 14 of 23 – Completing the Manager’s Evaluation

The Probationary Review will contain all of the same questions as the Checkpoints and function exactly like the Annual Evaluations in that a final rating will be calculated.

Notice that the comments from prior checkpoints are not included. You can use the opportunity to provide a summary of performance or you can expand Checkpoint #3 to View the Checkpoint document of accumulated comments and copy/paste as needed.
UTSA People Excellence

Probationary Review – Manager

Manager Evaluation - Update and Submit

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Section 1 - Core Values

We encourage an environment of dialogue and discovery, where integrity, excellence, inclusiveness, respect, collaboration and innovation are fostered. UTSA’s core values reflect how we, as employees, have pursued this plan as well as how we will fulfill our mission and realize our vision.

Integrity

Description: Adhering to a standard of core values at UTSA and ensuring that one acts in a fair and ethical fashion.

Manager Rating

Manager Comments

Submit for Approval
Step 15 of 23 – Evaluate Core Values
Select the **Core Values** tab, click **Expand** and provide **Comments** for each Core Value. Rate the employee on each competency on a 1-4 scale.

Step 16 of 23 – Evaluate Operation Excellence & Personal Growth
Repeat step 15 for **Operation Excellence** tab and **Personal Growth** tab.

Step 17 of 23 – Overall Summary
Select the **Overall Summary** tab. Click **Calculate All Ratings** link to calculate average ratings. Provide overall **Comments** for the evaluation.
Step 18 of 23 – EE Acknowledgment Tab
Note: *EE Acknowledgment* will be completed at a later step. It will remain blank until the document is shared with the employee to view their evaluation. This will occur after your Supervisor reviews.

Step 19 of 23 – Submit for Approval
Select *Save*. This allows you to save where you are and come back later to edit.

If you are done with the evaluation, click **Submit for Approval** for Next Level Supervisor Approval.
Note: If you hold multiple positions, choose the position that relates to the manager role to evaluate the employee.
Step 20 of 23 – Next Level Supervisor Approval

Your Supervisor will receive an email to log in and review/approve the probationary review. Once approved, you will receive an email notification.

**Note:** Denied evaluations will include comments for rework within the email only. Approver comments are not available on the document itself.

Step 21 of 23 – Share Evaluation with Employee

Repeat Steps 1-4 to access the document currently in an *Approval- Approved* status.

Select **Share with Employee**. Until the document is shared, the employee cannot view the evaluation or prior checkpoints.

Once Shared, you can refresh the Task Panel and select the current step *Pending Acknowledgement*.
Step 22 of 23 – Employee Acknowledgement
The employee receives an email to alert them it’s time to acknowledge their probationary review.

After the document has been acknowledged by the employee, you will receive an email that contains their final comments and then the system will automatically complete the document on your behalf.

Step 23 of 23 – Probationary Review Complete
You can find the document within your Team Performance Tile > Historical Documents where you can review each of the checkpoints and final evaluation in the future.
UTSA Probationary Review
Manager Evaluation - Completed

The document status is Complete. No further action is required but if you have any questions, please contact HR at 210-458-4259 or at one of the email addresses below:

- Annual Evaluations: HR@utsa.edu
- Probationary Reviews: HRBP@utsa.edu

Section 1 - Core Values

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Expand | Collapse

Integrity