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Overview
The Employee Self Evaluation allows an employee to create goals and complete self assessment on his/her job performance. It includes details about the ability to meet goals and performance factors.

- Employee Accesses PeopleSoft
- Employee Completes Goal Setting
  - Submission generates email to manager
- Manager Evaluates Employee Goals
  - Submission generates email to employee
- Manager & Employee: Mid-Year Check In
  *Please see the Performance Management Training Guide for more information on the Mid-Year Check In.*
  - Employee Completes Self Evaluation
    - This section requires employees to rate him/herself in **Goals, Core Values, Operation Excellence** and **Personal Growth**.
  - Employee Submits Evaluation to Manager
    - Submission generates email to manager
- Manager & Employee: One-on-One Meeting
  *Please see the Performance Management Training Guide for more information on the One-on-One Meeting.*
  - Manager Requests Acknowledgement from Employee
    - Requesting acknowledgement generates an email to employee
  - Employee Acknowledges (Or Manager Overrides)
    - Acknowledgement generates an email to manager
  - Manager Completes Evaluation
    - Completion generates an email to manager and employee
Step 1 of 12 – Employee Self Service
Select the **Employee Self Service** option from the drop-down on the PeopleSoft homepage.

![Employee Self Service](image)

Step 2 of 12 – Performance Tile
Select the **Performance** tile.

![Performance Tile](image)

Step 3 of 12 – My Current Documents
The performance documents will appear under **My Current Documents**. Click **UTSA Performance Evaluation**.

**Note**: The evaluation status is currently in Define Criteria. Upon the completion of goals and receiving manager approval, you will be able to complete employee self evaluation.

![My Current Documents](image)
Step 4 of 12 – Goals
Select the Goals tab, click Expand to review goals. Rate yourself on each goal and add your comments, making sure to Save along the way. The rating scale goes from Goal Achieved to Goal Not Achieved.

Note: People Leaders will have a Leadership tab instead of a Core Competencies tab.

TIP – Utilize the Spell Check feature when drafting your comments.
Step 5 of 12 – Adding Attachments

You have the ability to attach documents. These documents can include examples of your work, certifications and/or other documents you feel demonstrate your performance throughout the year.

To upload a document click Add Attachment. A File Attachment window will appear with the file name displayed and place for you will enter a Description. Click Upload to upload the document.

TIP: You can add attachments at any point as you are working through your evaluation process.

For your manager to view the documents when they are completing Manager Evaluation, you must select Employee and Manager in the Attachment Audience.

TIP: When saving these documents, please be sure to include enough information in the title so that your manager knows what the file is and what core value or competency it relates to.
Step 6 of 12 – Core Values
Select the **Core Values** tab, click **Expand** to review. Rate yourself on each Core Value and add your comments, making sure to **Save** along the way. The rating scale goes from 1=Does Not meet Expectations to 5=Role Model.

**TIP** – Click the Rating Description for detailed information on each rating.
Step 7 of 12 – Operation Excellence
Select the **Operation Excellence** tab, click **Expand** to review. Rate yourself on each value and add your comments, making sure to **Save** along the way. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.

**Rating Note:** All evaluations are divided into four tabs. Goals are either achieved or not achieved and are not calculated as a part of the overall rating. The subsequent three tabs each weigh one-third of the overall summary rating.
Step 8 of 12 – Core Competencies

Select the Core Competencies tab, click Expand to review. Rate yourself on each section and add your comments, making sure to Save along the way. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.
Step 9 of 12 – Summary
Select the Summary tab and enter Overall Summary comments. Select Calculate All Ratings to calculate the total average Employee Rating. Save to keep your changes.

Step 10 of 12 – Save
Select Save to keep your changes. This allows you to come back later to edit if you need more time to submit.

Step 11 of 12 – Complete
If you are done with your self evaluation, click Complete. Your manager will receive an email once employee self evaluation is completed.
Step 12 of 12 – Employee Acknowledgment
Once you have met with your manager and are ready to confirm the performance evaluation, select your UTSA Performance Evaluation.

Review the EE Acknowledgement tab and add your comments. Then Select Acknowledge after you and your manager have reviewed the document.
UTSA Performance Evaluation

Confirmation - Employee Acknowledgement

- You have successfully acknowledged this document.