Employee Self-Evaluation

Individual Contributor
**Table of Contents**

- **Overview** ................................................................................................................................................................. 2
- Step 1 of 14 – Employee Self-Service .......................................................................................................................... 3
- Step 2 of 14 – Performance Tile ....................................................................................................................................... 3
- Step 3 of 14 – My Current Documents .......................................................................................................................... 3
- Step 4 of 14 – Goal Setting ................................................................................................................................................ 4
- Step 5 of 14 – Goal Setting (Continuation) ..................................................................................................................... 5
- Step 6 of 14 – Notify Manager .......................................................................................................................................... 5
- Step 7 of 14 – Employee Self-Evaluation ...................................................................................................................... 6
- Step 8 of 14 – Goals .......................................................................................................................................................... 6
- Step 9 of 14 – Core Values ................................................................................................................................................ 7
- Step 10 of 14 – Operation Excellence ............................................................................................................................ 8
- Step 11 of 14 – Personal Growth .................................................................................................................................... 9
- Step 12 of 14 – Summary .................................................................................................................................................. 10
- Step 13 of 14 – Save ......................................................................................................................................................... 10
- Step 14 of 14 – Complete .................................................................................................................................................. 10
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 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 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

Evaluation available in Historical Documents
Step 1 of 14 – Employee Self-Service
Select the Employee Service option from the drop-down on the PeopleSoft homepage.

Step 2 of 14 – Performance Tile
Select the Performance tile.

Step 3 of 14 – My Current Documents

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.
Step 4 of 14 – Goal Setting
Add performance criteria (Goals) that you plan to accomplish during the performance period. Select **Add Item** and choose **Add your own item** from the available options. Enter goal information, including dates and full description.
Step 5 of 14 – Goal Setting (Continuation)
Click Add. Repeat steps as needed.

Step 6 of 14 – Notify Manager
Select the Notify and Send on the pop-up message to email the added goals to your manager.

Manager will review goals and update the document status of the evaluation to “in progress.” Employee will be able to complete the self-evaluation.
Step 7 of 14 – Employee Self-Evaluation
Repeat steps 1-3 to attain the Employee Evaluation page.
Note: The document status is now in Evaluation in Progress, readily available to complete the self-evaluation.

Step 8 of 14 – Goals
Select the Goals tab, click Expand to review goals. Rate yourself on each goal.
The rating scale goes from Goal Achieved to Goal Not Achieved.
Step 9 of 14 – Core Values
Select the Core Values tab, click Expand to review. Rate yourself on each value. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.
Step 10 of 14 – Operation Excellence

Select the **Operation Excellence** tab, click **Expand** to review. Rate yourself on each operational expectation. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.
Step 11 of 14 – Personal Growth
Select the **Personal Growth** tab, click **Expand** to review. Rate yourself on each operational expectation. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.

<table>
<thead>
<tr>
<th>Rating Description</th>
<th>Employee Rating</th>
<th>Employee Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does Not Meet Expectations</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>2. Somewhat Meets Expectations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Meets Expectations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Exceeds Expectations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Role Model</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Description:** Pivots up on the need to change personal, interpersonal, and managerial behavior quickly, watches others for their reactions to his/her attempts to influence and perform, and adjusts his/her feedback sensitive to changing personal demands and requirements and changes accordingly.
Step 12 of 14 – Summary
Select the Summary tab and enter Overall Summary comments. Select Calculate All Ratings to calculate the total average Employee Rating.

Step 13 of 14 – Save
Select Save to keep your changes. This allows you to come back later to edit if you need more time to submit.

Step 14 of 14 – Complete
If you are done with your self-evaluation, click Complete. Manager will receive an email once employee self-evaluation is completed.
Step 13 of 14 – Employee Acknowledgment

Once you are ready to confirm the performance appraisal, review completed with your manager. Follow steps 1 – 3 to review current documents. Select the **Pending Acknowledgment** document.

Step 14 of 14 – Employee Acknowledgment (Continuation)

Select **Acknowledge** that you and your manager have reviewed the document.