Employee Self-Evaluation

People Leader
# Employee Self-Evaluation – Individual Contributor

## ePerformance Guide

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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**

- **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**

- **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- **Evaluation available in Historical Documents**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 22 – Employee Self-Service
Select the Employee Self Service option from the drop-down on the PeopleSoft homepage.

Step 2 of 22 – Performance Tile
Select the Performance tile.

Step 3 of 22 – 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 22 – 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.
Note: There is a spell check option that you can use to correct misspelling errors before submitting.
Step 5 of 22 – Goal Setting (Continuation)
Click Add. Repeat steps as needed.

Step 6 of 22 – Notify Manager
Select the Notify and Send on the pop-up message to email the added goals to your manager.
Note: Select Save before continuing.
Manager will review goals and update the document status of the evaluation to “track progress.”
Step 7 of 22 – Goals Mid-Year Check In
Repeat steps 1-3 to attain the Goal Mid-Year Check In page.
Note: The document status is now in Track Progress – Goals Mid-Year Check In, readily available to complete the mid-year check in.

Step 8 of 22 – Goals Mid-Year Check In (Continuation)
Repeat steps 4-6 to add goals if needed.
Click the Expand to access the Employee Comments section and the Edit function if needed. The Edit function allows you to edit goals that have already been created.
Step 9 of 22 – Share with Manager
Click **Share with Manager** and **Confirm** to share your comments with your manager.
Step 10 of 22 – Notify Manager

Select **Notify** and then **Send** on the pop-up message to email the added goals or comments to your manager.
Step 11 of 22 – Open Evaluation
Repeat steps 1-3 to attain the **Open Evaluation** page.
Note: The document status is now in **Track Progress-Open Evaluation**, readily available to finalize your goals.

Step 12 of 22 – Open Evaluation (Continuation)
Repeat step 8 if you need to make any final changes to your goals before continuing to the evaluation.
Repeat step 9 to complete this checkpoint.
Note: If you make any changes click **Save** before continuing.
Step 13 of 22 – Employee Self-Evaluation
Repeat steps 1-3 to attain the Employee Self-Evaluation page.
Note: The document status is now Evaluation in Progress, readily available to complete your employee self-evaluation.
Step 14 of 22 – 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.  

**Note:** People Leaders have additional tabs.
Step 15 of 22 – Core Values
Select the Core Values tab, click Expand to review.
Rate yourself on each Core Value.
The rating scale goes from 1=Does Not meet Expectations to 5=Role Model.
Step 16 of 22 – Operation Excellence
Select the **Operation Excellence** 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 17 of 22 – Personal Growth
Select the **Personal Growth** tab, click **Expand** to review. Rate yourself on each section. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.
Step 18 of 22 – Summary
Select the Summary tab and enter Overall Summary comments. Select Calculate All Ratings to calculate the total average Employee Rating.

Step 19 of 22 – Save
Select Save to keep your changes. This allows you to come back later to edit if you need more time to submit.

Step 20 of 22 – Complete
If you are done with your self-evaluation, click Complete. Manager will receive an email once employee self-evaluation is completed.
Step 21 of 22 – 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.

![Pending Acknowledgment Document](image)

Step 22 of 22 – Employee Acknowledgment (Continuation)
Select **Acknowledge** that you and your manager have reviewed the document.

![Acknowledged Document](image)
**Performance Process**

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<tr>
<td>UTSA Performance Evaluation</td>
<td>08/01/2021 - 08/31/2022</td>
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**UTSA Performance Evaluation**

**Confirmation - Employee Acknowledgement**

- You have successfully acknowledged this document.