Employee Self-Evaluation

People Leader
Employee Self-Evaluation – People Leader
ePerformance

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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 Completes Goal Setting
  - Submission generates email to manager

- Manager Evaluates Employee Goals
  - Submission generates email to employee

- Employee Completes Self-Evaluation
  - This section requires employees to rate him/herself in **Goals, Core Values, Leadership** and **Operation Excellence**.
  - Submission generates email to manager

- Employee Submits Evaluation 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Evaluation available in Historical Documents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 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.

![Add button](image)

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

![Email pop-up](image)

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 15 – 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 – Leadership

Select the Leadership 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 – 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.

- **Section 4 - Operational Excellence**
  A philosophy of the workplace where problem-solving and teamwork results in the ongoing improvement in an organization. The process involves focusing on the customers’ needs and continually improving the current activities in the workplace.

- **Business Acumen**
  Description: Knows how businesses work; knowledgeable in current and possible future policies, practices, trends, and information affecting his/her business and organization; knows the competition; is aware of how strategies and tactics work in the marketplace.

- **Strategic Planning**

- **Organizational Agility**
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**. Select Save to keep your changes, this allows you to come back later to edit if you need more time to submit. 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.

My Current Documents

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Document Status</th>
<th>Period Begin / Period End</th>
<th>Next Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTSA Performance Evaluation</td>
<td>Pending Acknowledgement</td>
<td>02/28/2020</td>
<td>03/03/2020</td>
</tr>
</tbody>
</table>

Step 14 of 14 – Employee Acknowledgment (Continuation)
Select **Acknowledge** that you and your manager have reviewed the document.