Manager Guide To Evaluating Employees
# Table of Contents

**Overview** ............................................................................................................................................... 3

- Step 1 of 18 – Manager Self Service ........................................................................................................ 4
- Step 2 of 18 – Performance Tile ................................................................................................................ 4
- Step 3 of 18 – Current Documents .............................................................................................................. 4
- Step 4 of 18 – Verify ..................................................................................................................................... 5
- Step 5 of 18 – Open Evaluation ................................................................................................................... 5
- Step 6 of 18 – Review Employee Attachments ............................................................................................. 6
- Step 7 of 18 – Reopen Self Evaluation ....................................................................................................... 8
- Step 8 of 18 – Evaluate Goals .................................................................................................................... 8
- Step 9 of 18 – Evaluate Core Values .......................................................................................................... 9
- Step 10 of 18 – Evaluate Operation Excellence & Core Competencies .................................................... 10
- Step 11 of 18 – Summary .......................................................................................................................... 11
- Step 12 of 18 – EE Acknowledgment ......................................................................................................... 11
- Step 13 of 18 – Save ..................................................................................................................................... 12
- Step 14 of 18 – Submit for Approval ........................................................................................................... 12
- Step 15 of 18 – Meet with Employee .......................................................................................................... 15
- Step 16 of 18 – Share with Employee ......................................................................................................... 13
- Step 17 of 18 – Review Final Comments .................................................................................................. 14
- Step 18 of 18 - Complete Evaluation ......................................................................................................... 14
Overview
The Manager Self-Service appraisal process consists of rating competencies, providing feedback for each criterion, meeting with employee, and an overall summary when evaluating the employees work performance factors.

- Submission generates email to employee
- This section requires the manager to rate the employee’s Goals, Core Values, Operation Excellence, Personal Growth and Leadership (if applicable).
- Submission generates email to next level manager

Manager & Employee: One-on-One Meeting
- Sharing the document generates an email to the employee
- Acknowledgement generates an email to manager
- Completion generates an email to manager and employee

Evaluation available in Historical Documents
Manager Guide to Evaluating Employees

Step 1 of 18 – Manager Self-Service
Select the Manager Self-Service option from the drop-down menu on the PeopleSoft homepage.

Step 2 of 18 – Performance Tile
Select the Team Performance tile.

Step 3 of 18 – Current Documents
A list of available Current Documents will appear. Select an employee to continue.
Step 4 of 18 – Verify
Verify employee information.

Step 5 of 18 – Open Evaluation
If you haven’t opened the employee’s evaluation yet, you can retrieve the evaluation using these steps:

Select Open Evaluation, then Update and Complete, then click the Open Evaluation button (top right). This will provide access for the employee to complete their self evaluation.

If you have opened the employee’s evaluation, you may continue to Step 6.
Step 6 of 18 – Review Employee Attachments

To see employee attachments, you must open the Self Evaluation. Go to Review Self Evaluation and click View.

Scroll down to find the **Attachments** section. All attachments will be located in the same section, regardless of what tab they were originally added. To view the attachment, **Click the File Name**. To attach to the Manager Evaluation click **Save**.
You will get this pop up:

![File copy success message]

You’ll need to **Refresh** the Manager Evaluation to view the file(s). To refresh, **Click the Icon** below:

![Refresh icon]

After you refresh, click **Complete Manager Evaluation** then **Update and Submit**.

![Manager Evaluation steps and tasks]

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**Performance Process**

**Steps and Tasks**

Cynthia Ashworth
UTSA Performance Evaluation
09/01/2021 - 08/31/2022

- Goal Setting
  - Due Date: 11/15/2021
- Goals Mid-Year Check In
  - Due Date: 04/15/2022
- Open Evaluation
  - Due Date: 07/01/2022
- Review Self Evaluation
  - Due Date: 06/15/2022
- Complete Manager Evaluation
  - Due Date: 09/01/2022

**Update and Submit**
Step 7 of 18: FEATURE: Reopen the Self Evaluation (If Applicable or Requested by Employee)

If the employee needs to update their self-evaluation, you can click Reopen to send the evaluation back to the employee for updates.

Step 8 of 18 – Evaluate Goals

Select the Goals tab, Rate the employee on each competency, then provide Comments for each goal, making sure to Save along the way. The rating choices are Goal Achieved to Goal Not Achieved. As you begin to rate the employee, you will be able to view the rating they gave themselves just below your comment box.

TIP – Utilize the Spell Check feature when adding your comments.
Step 9 of 18 – Evaluate Core Values

Select the Core Values tab, click Expand, Rate the employee on each competency, then provide Comments for each core value, making sure to Save along the way. The rating scale goes from 1=Does Not meet Expectations to 5=Role Model. As you begin to rate the employee, you will be able to view the rating they gave themselves just below your comment box.

TIP – Click the Rating Description for detailed information on each rating
Step 10 of 18 – Evaluate Operation Excellence & Core Competencies
Repeat steps for Operation Excellence and Core Competencies tabs.

**Note:** People Leaders and Executives have different tabs and competencies however the same steps apply here.

**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 11 of 18 – Summary

Select the Summary tab. Select Calculate All Ratings to calculate the total average Employee Rating then enter Overall Summary comments. Save to keep your changes.

NOTE: Even if employee doesn’t rate themselves in a certain area, the system will not let you submit if don’t rate each section. Please encourage employees to complete all sections of the Self Evaluation.

Step 12 of 18 – Employee Acknowledgment

EE Acknowledgment will be completed at a later step (Step 16).
Step 13 of 18 – 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 18 – Submit for Approval
After you have completed the Calibration process and aligned your score with your supervisor, you are ready to submit the employee’s evaluation for approval. Click Submit for Approval and Confirm for next level manager approval.

Note: If you hold multiple positions, choose the position that relates to the manager role.

Step 15 of 18 – Meet with Employee
Once the calibration process has been complete and you have had supervisor approval, please schedule time to meet with your employee to review the evaluation.
Step 16 of 18 – Share with Employee

During or shortly after your meeting with the employee, click Share with Employee.

TIP: You will see green checkmarks appear as you complete the steps of the performance evaluation process.
Step 17 of 18 – Review Final Comments
After the employee has Acknowledged their evaluation, it is sent back to you to review employee final comments.

Step 18 of 18 – Complete
After the document has been acknowledged by the employee, the evaluation is Complete. When the evaluation is complete you will see a green button beside the Review Manager Evaluation section and the Instructions will say, “The document status is Completed. No further action is required.”