Manager Evaluation

Job Aid
Manager Evaluation
ePerformance

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## Overview

The Manager Self-Service appraisal process consists of rating competencies, providing feedback for each criteria, meeting with employee, and an overall summary when evaluating the employees work performance factors.

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<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Accesses PeopleSoft</td>
<td></td>
</tr>
<tr>
<td>Manager Evaluates Employee Goals</td>
<td></td>
</tr>
<tr>
<td>Employee Completes Self-Evaluation</td>
<td></td>
</tr>
<tr>
<td>Manager Completes Employee Evaluation</td>
<td>This section requires the manager to rate the employee’s Goals, Core Values, Operation Excellence, Personal Growth and Leadership (if applicable).</td>
</tr>
<tr>
<td>Manager Submits Evaluation for Approval</td>
<td>Submission generates email to next level manager</td>
</tr>
<tr>
<td>Manager Incorporates Feedback and Changes (if any)</td>
<td></td>
</tr>
<tr>
<td>Manager Shares Evaluation with Employee</td>
<td>Sharing the document generates an email to the employee</td>
</tr>
<tr>
<td>Manager Requests Acknowledgement from Employee</td>
<td>Requesting acknowledgement generates an email to employee</td>
</tr>
<tr>
<td>Employee Acknowledges (Or Manager Overrides)</td>
<td>Acknowledgement generates an email to manager</td>
</tr>
<tr>
<td>Manager Completes Evaluation</td>
<td>Completion generates an email to manager and employee</td>
</tr>
</tbody>
</table>

**Manager & Employee: One-on-One Meeting**

**Evaluation available in Historical Documents**
Step 1 of 17 – Manager Self-Service
Select the **Manager Self-Service** option from the drop-down menu on the PeopleSoft homepage.

Step 2 of 17 – Performance Tile
Select the **Team Performance** tile.

Step 3 of 17 – My Current Documents
A list of available **Current Documents** will appear. Select an employee to continue.
Step 4 of 17 – Verify
Be sure to verify employee information.

Step 5 of 17 – Evaluate Goals
Select the Expand link. Use the pencil icon to provide edits for each goal (if necessary).
Step 6 of 17 – Complete
Select Save. This allows you to save where you are and come back later to edit. If you are done with the evaluation, click Submit.

This makes the document status of the evaluation in progress, and allows the employee to complete the self-evaluation.

Step 7 of 17 – 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 17 – Evaluate Goals
Select the Goals tab, provide Comments for each goal. Rate the employee on each competency. Goal Achieved or Goal Not Achieved.

<table>
<thead>
<tr>
<th>Goals</th>
<th>Core Values</th>
<th>Operation Excellence</th>
<th>Personal Growth</th>
<th>Summary</th>
<th>EE Acknowledgement</th>
</tr>
</thead>
</table>

**Goal 1 - Certification**

Description: Obtain SHRM certification by May 2020

Manager Rating

Manager Comments

- Goal Achieved
- Goal Not Achieved

Employee Rating

Employee Comments

**Goal 2 - Training**

Goal setting is a process in which the employee and supervisor set goals for the upcoming performance year.

To increase effectiveness, goals should be specific, measurable, achievable, relevant, and bound to a timeline for completion.
Step 9 of 17 – Evaluate Core Values

Select the Core Values tab, click Expand and provide Comments for each Core Value. Rate the employee on each competency: 1 = Does Not Meet Expectations to 5 = Role Model.

Manager Evaluation - Update and Submit

Section 2 - Core Values

We encourage an environment of dialogue and discovery, where integrity, excellence, inclusiveness, respect, collaboration and innovation are fostered. UTSA’s core values reflect how we, as employees, have pursued this plan as well as how we will fulfill our mission and realize our vision.

Integrity

Description: Adhering to a standard of core values at UTSA and ensuring that one acts in a fair and ethical fashion.

Manager Rating

Employee Rating

Employee Comments:

1. Does Not Meet Expectations
2. Somewhat Meets Expectations
3. Meets Expectations
4. Exceeds Expectations
5. Role Model
Step 10 of 17 – Evaluate Operation Excellence
Repeat step 8 for Operation Excellence tab and Personal Growth tab.

Note: People Leaders have additional tabs.
Step 11 of 17 – Overall Summary
Select the Summary tab. Click Calculate All Ratings link to calculate average ratings. Provide overall Comments for the evaluation.

Step 12 of 17 – EE Acknowledgment
EE Acknowledgment will be completed at a later step (Step 16).
Step 13 of 17 – Save
Select **Save**. This allows you to save where you are and come back later to edit.

Step 14 of 17 – Submit for Approval
If you are done with the evaluation, click **Submit for Approval** for next level manager approval.

**Note:** This step is not necessary for academic admin evaluations.

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

<table>
<thead>
<tr>
<th>Data</th>
<th>Job Title</th>
<th>Department</th>
<th>Supervisor Name</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>PROFESSOR</td>
<td>COS BIOLOGY</td>
<td>Garry White</td>
<td>University of Texas, San Anton</td>
</tr>
<tr>
<td>☑</td>
<td>ENDOWED CHAIR</td>
<td>COS BIOLOGY</td>
<td>Garry White</td>
<td>University of Texas, San Anton</td>
</tr>
<tr>
<td>☑</td>
<td>DIR STU DEV &amp; LEADERSHIP</td>
<td>COS BIOLOGY</td>
<td>John Riddle</td>
<td>University of Texas, San Anton</td>
</tr>
<tr>
<td>☑</td>
<td>PROFESSOR</td>
<td>COS CHEMISTRY</td>
<td>Will Smith</td>
<td>University of Texas, San Anton</td>
</tr>
</tbody>
</table>

**UTSA Performance Evaluation**

**Confirmation - Approval Submitted**

You have successfully submitted this document for approval.
Step 15 of 17 – Share with Employee
Repeat steps 1-3 and select Approved evaluation by next level manager.
Note: Denied evaluations will include comments for rework.

Select Share with Employee.

Step 16 of 17 – Request Acknowledgment
Once you are ready to confirm the performance appraisal, review with the employee. Select the Request Acknowledgement to request employee acknowledgment.
Step 17 of 17 – Complete
After the document has been acknowledged by the employee, select the **Complete** button. Once the document is approved, the status of the document will be automatically set to complete, and can be found under **Historical Documents**.
**Team Performance**

**Performance Process**

<table>
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<tr>
<th>Steps and Tasks</th>
</tr>
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<tbody>
<tr>
<td>Overview</td>
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</tbody>
</table>

**John Smith**

UTSA Performance Evaluation

02/19/2020 ~ 02/19/2020

- **Goal Setting**
  Due Date: 05/01/2019

- **Review Self Evaluation**
  Due Date: 02/28/2020

- **Complete Manager Evaluation**
  Due Date: 02/28/2020

**UTSA Performance Evaluation**

**Confirmation - Document Completed**

- You have successfully completed your evaluation.