Manager Evaluation

Job Aid
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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 employee's work performance factors.

- Manager Accesses PeopleSoft
- Manager Evaluates Employee Goals
  - Submission generates email to employee
- Employee Completes Self-Evaluation
- Manager Completes Employee Evaluation
  - This section requires the manager to rate the employee’s Goals, Core Values, Operation Excellence, Personal Growth and Leadership (if applicable).
- Manager Submits Evaluation for Approval
  - Submission generates email to next level manager
- Manager Incorporates Feedback and Changes (if any)
- Manager Shares Evaluation with Employee
  - Sharing the document generates an email to the employee
- 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- Evaluation available in Historical Documents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 20 – Manager Self-Service
Select the **Manager Self-Service** option from the drop-down menu on the PeopleSoft homepage.

![Manager Self Service](image)

Step 2 of 20 – Performance Tile
Select the **Team Performance** tile.

![Team Performance](image)

Step 3 of 20 – My Current Documents
A list of available **Current Documents** will appear. Select an employee to continue.

![Current Documents](image)
Step 4 of 20 – Verify
Be sure to verify employee information.

Step 5 of 20 – Evaluate Goals
Select the Expand link. Use the pencil icon to provide edits for each goal (if necessary).
Step 6 of 20 – 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 20 – Goals Mid-Year Check In
Repeat Steps 1 -3 to attain the Goals Mid-Year Check In page.
Note: The document status is now in Track Progress-Goals Mid-Year Check In.

Step 8 of 20 – Goals Mid-Year Check In (Continuation)
If you would like to make any last adjustments to your employee’s goals, repeat steps 5-6. If adjustments are made, select Share with Employee. If no adjustments are needed select Next Checkpoint.
Note: If you make any changes to the document select Save before moving on.
Note: If adjustments were made and comments were shared with the employee, select **Complete Checkpoint** and **Confirm** to complete this step.
Step 9 of 20 – Open Evaluation

Repeat Steps 1 - 3 to attain the Open Evaluation page.

If you have any final adjustments to your employees’ goals repeat steps 5-6 and 8. If no adjustments are made select Open Evaluation and Confirm to complete this step.

Note: The document status is now in Track Progress-Open Evaluation.
Step 10 of 20 – 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 11 of 20 – Evaluate Goals
Select the Goals tab, provide Comments for each goal. Rate the employee on each competency. Goal Achieved or Goal Not Achieved.

Note: There is a spell check function (check mark icon) you can use before submitting.
Step 12 of 20 – 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.
Step 13 of 20 – Evaluate Operation Excellence

Repeat step 8 for Operation Excellence tab and Personal Growth tab.

Note: People Leaders have additional tabs.
Step 14 of 20 – Overall Summary
Select the Summary tab. Click Calculate All Ratings link to calculate average ratings. Provide overall Comments for the evaluation.

Step 15 of 20 – EE Acknowledgment
EE Acknowledgement will be completed at a later step (Step 16).
Step 16 of 20 – Save
Select Save. This allows you to save where you are and come back later to edit.

Step 17 of 20 – Submit for Approval
If you are done with the evaluation, click Submit for Approval and Confirm 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.

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</tr>
</tbody>
</table>
Step 18 of 20 – 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 19 of 20 – Request Acknowledgment

Once you are ready to confirm the performance appraisal, review with the employee. Select the Request Acknowledgement to request employee acknowledgment.
Step 20 of 20 – Complete
After the document has been acknowledge 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.