

The University of Texas at San Antonio

UTSA People Excellence

Manager Evaluation Process

Quick Guide

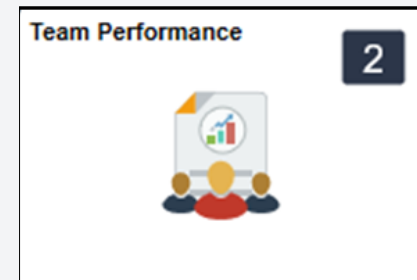
What Is the Manager Self-Service Process?

The manager self-service appraisal process consists of:

- Rating competencies
- Providing feedback for each criteria
- Meeting with employee
- Writing an overall summary evaluating employee work performance factors

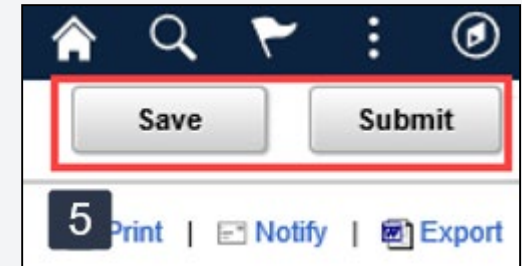
Team Performance

1. Select **Manager Self-Service** from the dropdown menu on the PeopleSoft homepage.
2. Select the **Team Performance** tile.
3. The performance documents appear under **Current Documents**. Select an employee to continue.

A screenshot of the PeopleSoft Manager Self Service interface. The top navigation bar is dark blue with "Manager Self Service" on the left and "Team Performance" on the right. On the left side, there is a sidebar with four menu items: "Current Documents" (highlighted in green), "Historical Documents", "View-Only Documents", and "Approve Documents". The main content area is titled "Current Documents" and contains a table with a dropdown menu above it. The table has three columns: "Name / Job Title", "Document Type", and "Document Status". A red border highlights the first row of the table. A small dark square with the number "3" is in the top right corner of the main content area.

Name / Job Title	Document Type	Document Status
John Smith RESEARCH SCIENCE ASSOCIATE II	UTSA Performance Evaluation	Evaluation in Progress

4. Select the **Expand** link. Use the **pencil icon** to provide edits for each goal, if necessary.
5. Select **Save**. This allows you to save and go back to edit. If you are done with the evaluation, click **Submit**.
6. Repeat steps 1-3 to bring up the Employee Evaluation page.



A screenshot of a table titled 'Current Documents'. On the right side, there is a dark square with the number '6'. The table has three columns: 'Name / Job Title', 'Document Type', and 'Document Status'. There is one row of data.

Name / Job Title	Document Type	Document Status
John Smith RESEARCH SCIENCE ASSOCIATE II	UTSA Performance Evaluation	Evaluation in Progress

Fill Out Employee Evaluation

7. Select the **Goals** tab.

- Provide **Comments** for each goal.
- Rate the employee with **Goal Achieved** or **Goal Not Achieved**.

8. Select the **Core Values** tab

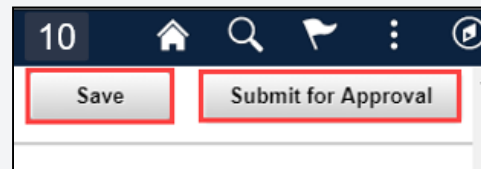
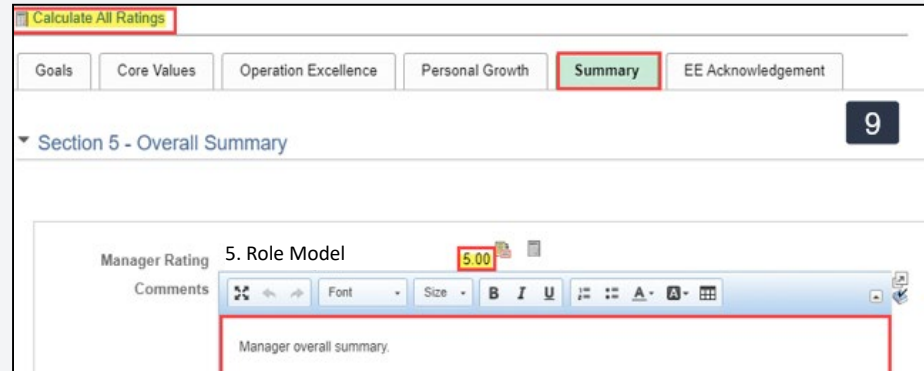
- click **Expand** and provide Comments for each Core Value. Rate the employee on each competency.

Note

- Repeat for additional Tabs (A and B).
- Supervisors and academic administration employees have additional tabs.

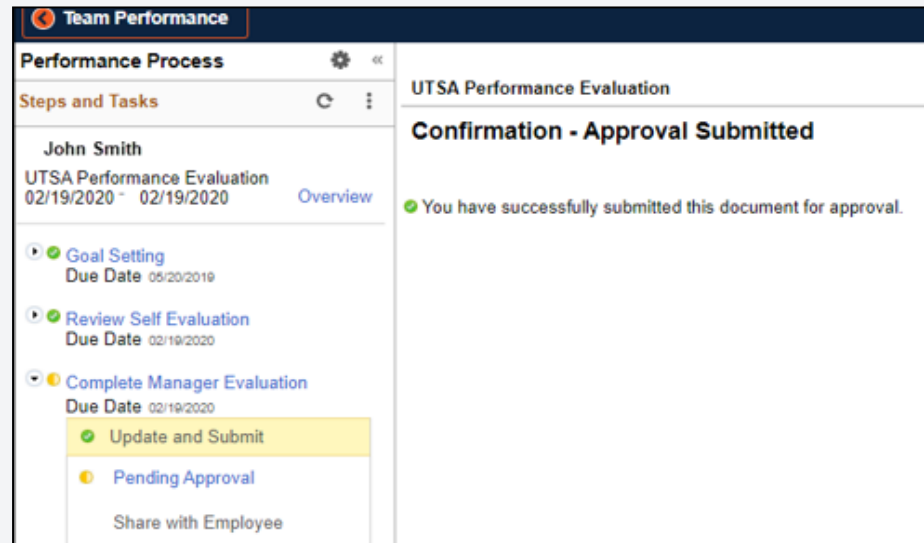
9. Select the **Summary** tab.

- Click **Calculate All Ratings** to calculate average ratings.
- Provide overall **Comments** for the evaluation.



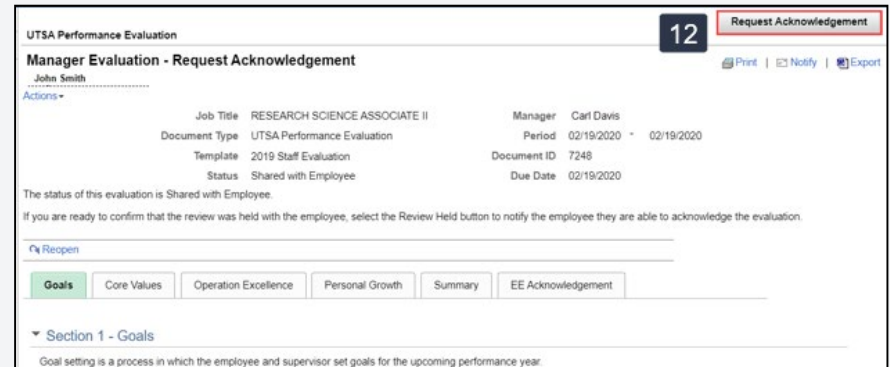
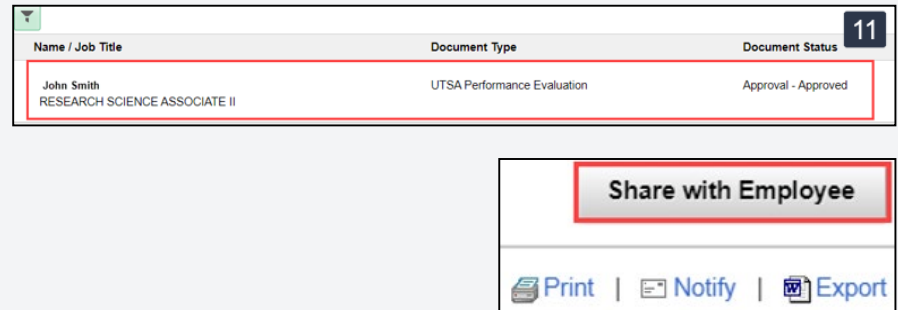
10. Submit for Next Level Manager Approval.

- Select **Save** to keep your changes and edit later.
- If you are done with the evaluation, click **Submit for Approval**.



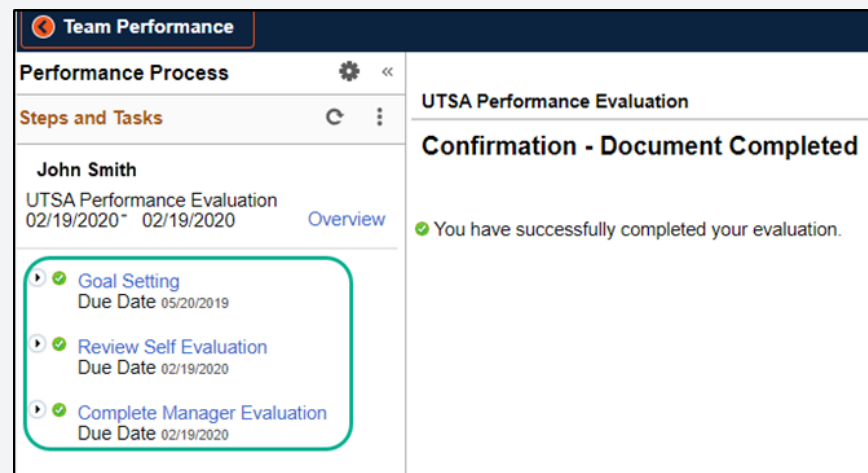
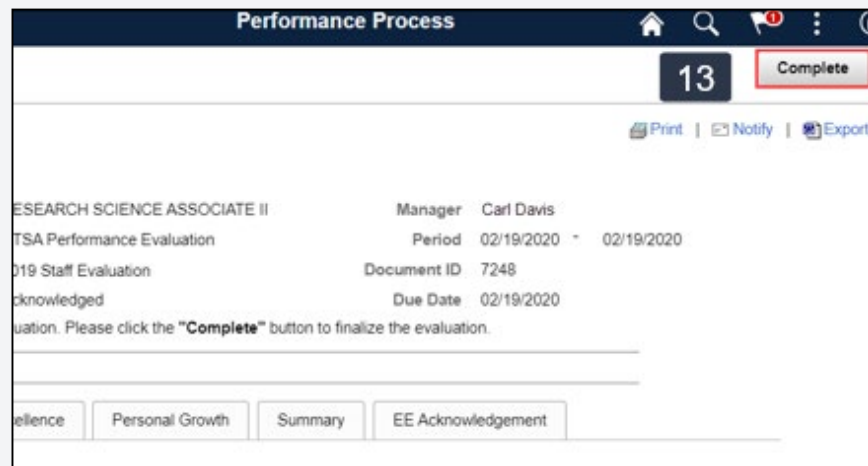
Share with Employee

11. Repeat steps 1-3 and select **Approved Evaluation by Next Level Supervisor**. Select **Share with Employee**.
12. Once you are ready to confirm the performance appraisal with the employee, select **Request Acknowledgment**.



Complete Evaluation

13. After the document is acknowledged by the employee, select the **Complete** button.
- Once the document is approved, the status of the document will automatically set to complete.
 - Find completed documents under **Historical Documents**.



UTSA[®]

utsa.edu/peopleexcellence