

UTSA People Excellence

Employee Self-Evaluation Guide

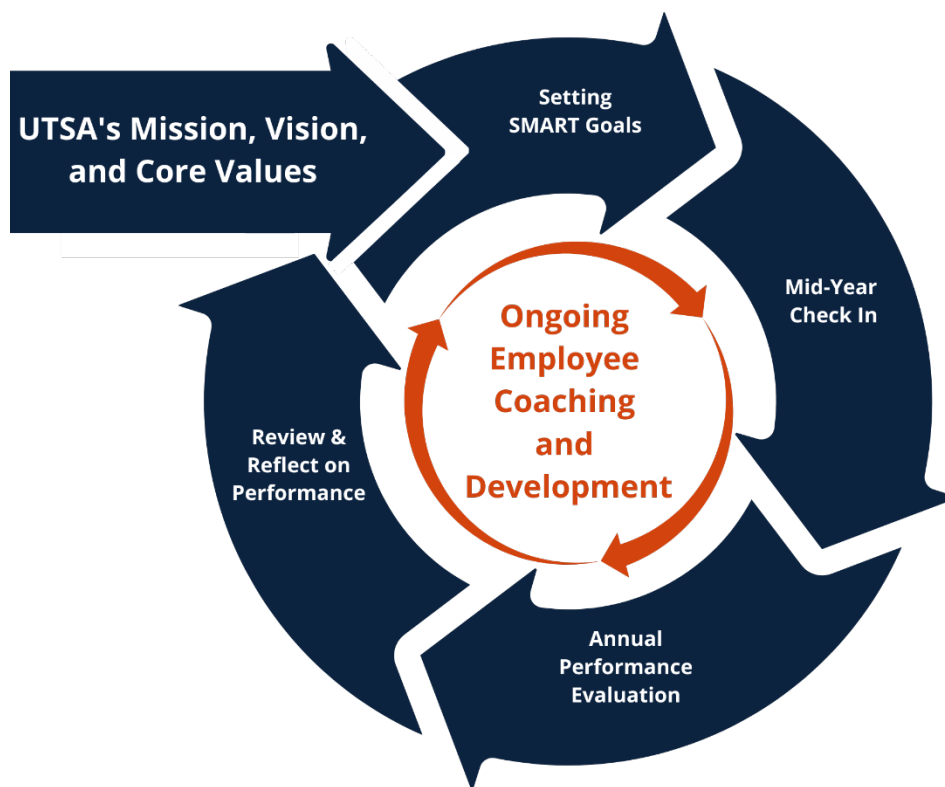
Employee Self-Evaluation –ePerformance Guide

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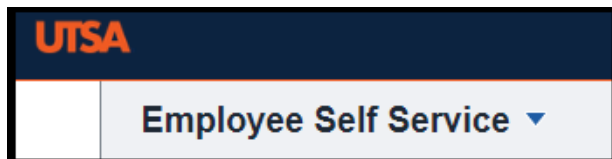
Self-Evaluation Overview

The Self-Evaluation portion of the UTSA Annual Performance Evaluation provides the employee an opportunity to reflect on their progress towards established goals and performance as it relates to the university core values and core competencies. This resource assists in the technical side of completing this step. For assistance, please reach out to [Talent Management](#).



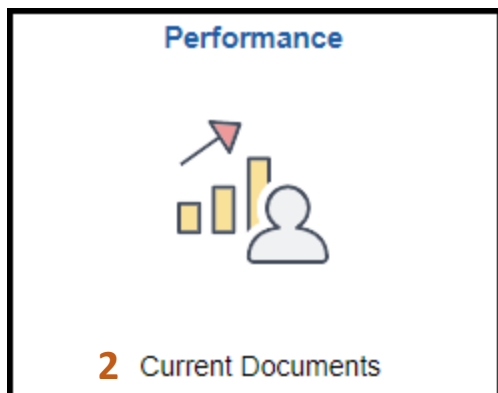
Step 1 of 12 – Employee Self-Service

Select the **Employee Self Service** option from the drop-down on the PeopleSoft homepage.



Step 2 of 12 – Performance Tile

Select the **Performance** tile.



Step 3 of 12 – My Current Documents

The performance documents will appear under **My Current Documents**. Select **UTSA Performance Evaluation**.

Note: If the evaluation status shows as Define Criteria, this means the goals have not been submitted. Once the goals have been submitted and the evaluation has been opened, you may proceed to the self-evaluation.

<Employee Name>

Step 4 of 12 – Goals

Select the **Goals** tab.

The screenshot shows the 'Performance Process' interface. On the left, the 'Steps and Tasks' list includes 'Goal Setting', 'Goals Mid-Year Check In', 'Open Evaluation', 'Complete Self Evaluation', and 'Review Manager Evaluation'. The 'Complete Self Evaluation' step is expanded, showing 'Update and Complete' as the current task. The main content area is titled 'Self-Evaluation - Update and Complete' and contains a form for 'Employee Data' (Job Title, Document Type, Template, Status, Manager, Period, Document ID, Due Date) and a section for 'Instructions: Self-Evaluation'. Below the instructions, there are tabs for 'Goals', 'Core Values', 'Operation Excellence', 'Core Competencies', and 'Summary'. The 'Goals' tab is selected and highlighted with a red box. The 'Section 1 - Goals' section is visible, with an 'Expand' button highlighted by a red box. The 'Continuous Improvement: Module Development and Adjustment' section is also visible.

Select **Expand** to review goals.

Rate yourself on each goal and add your comments, making sure to **Save** often.

(The rating scale has 2 choices: Goal Achieved or Goal Not Achieved.)

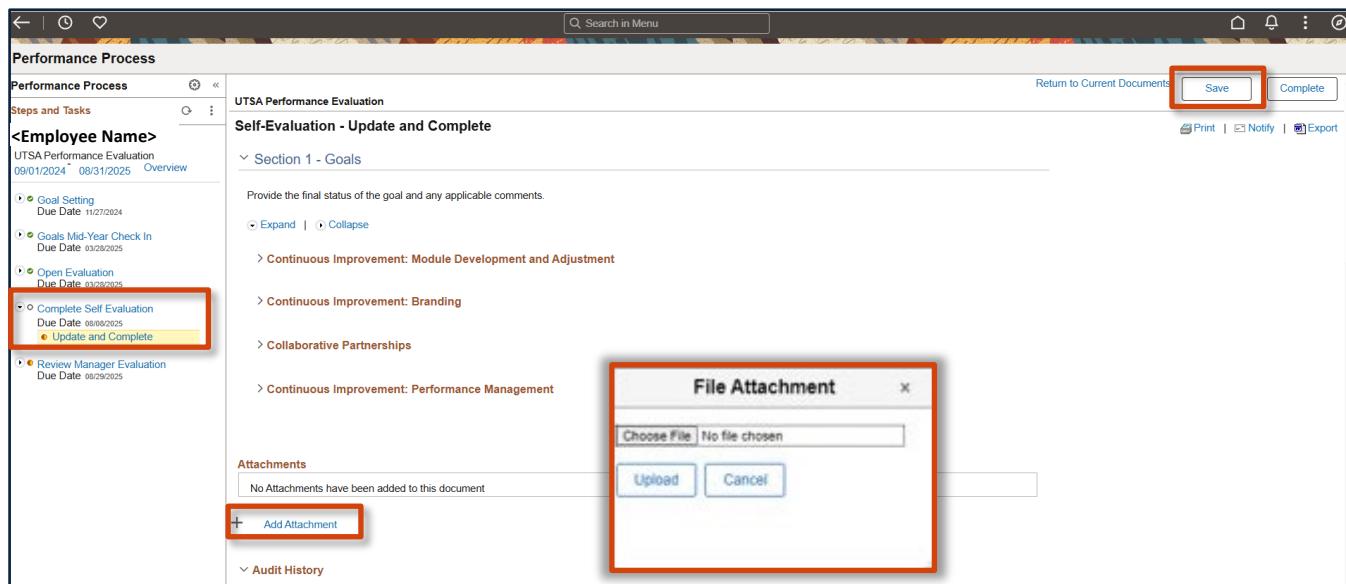
This screenshot shows the 'Goals' tab selected in the 'Self-Evaluation - Update and Complete' section. The 'Section 1 - Goals' section is expanded, showing a 'Training Goal' with a description: 'Develop a comprehensive intake process and project timeline by August 31, to ensure clear communication of milestones and timely completion across all SMEs.' Below the description, there is a form for 'Employee Rating' and 'Employee Comments'. The 'Employee Rating' dropdown menu is open, showing two options: 'Goal Achieved' and 'Goal Not Achieved'. The 'Save' button is highlighted with a red box. The 'Complete' button is also visible. The 'Expand' button is highlighted with a red box. The 'Continuous Improvement: Module Development and Adjustment' section is also visible. A green callout box with a red border contains the text: 'TIP: Utilize the Spell Check feature when drafting your comments.' The 'Save' button is also highlighted with a red box. The 'Complete' button is also visible. The 'Expand' button is highlighted with a red box. The 'Continuous Improvement: Module Development and Adjustment' section is also visible.

TIP: Utilize the Spell Check feature when drafting your comments.

Step 5 of 12 – Adding Attachments

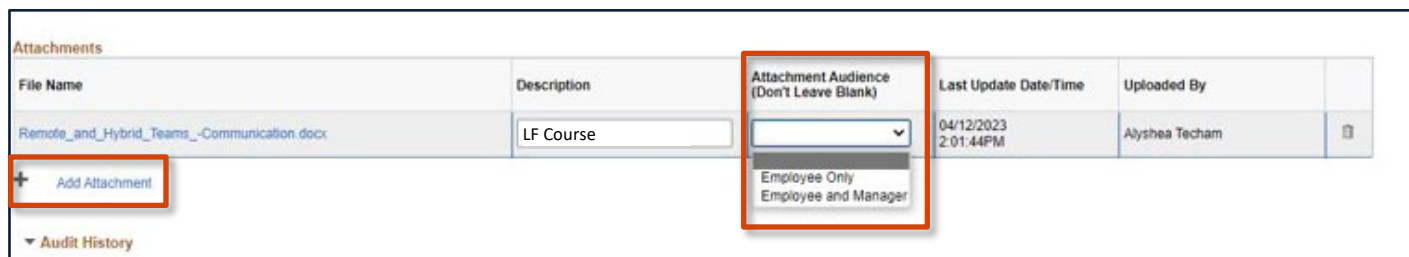
You have the ability to attach documents. These documents can include examples of your work, certifications and/or other documents you feel demonstrate your performance throughout the year.

To upload a document, click **Add Attachment**. A file Attachment window will appear with the file name displayed and a place for you to enter a description. Click **Upload** to upload the document.



Tip: You can add attachments at any point as you are working through your evaluation process.

For your manager to view the documents when they are completing the Manager Evaluation, you must select Employee and Manager in the Attachment Audience.



TIP: When saving these documents, please be sure to include enough information in the title so that your manager knows what the file is and what core value or competency it relates to.

Step 6 of 12 – Core Values

Select the **Core Values** tab, click **Expand** to review.

The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists steps: Goal Setting, Goals Mid-Year Check In, Open Evaluation, Complete Self Evaluation (with 'Update and Complete' highlighted), and Review Manager Evaluation. The main area is titled 'Self-Evaluation - Update and Complete' and has tabs for Goals, Core Values (selected), Operation Excellence, Core Competencies, and Summary. Under 'Section 2 - Core Values', there is a text block and a list of core values: Integrity, Excellence, Respect, Collaboration, and Innovation. The 'Expand' button next to the list is highlighted with a red box.

Rate yourself on each Core Value and add your comments, making sure to **Save** often.

The rating scale goes from 1=Does Not meet Expectations to 5=Role Model. (see below)

There are 2 options for rating yourself.

Option 1: Select a rating from the drop-down box in **Employee Rating**.

Option 2: Select this symbol:  A rubric will appear on the screen.

Select the appropriate rating and then click **Select Proficiency**. Then click **Return**.

This screenshot shows the 'Performance Process' interface with a callout box titled 'Proficiencies' on the right. The callout box contains a table with 5 rows, each representing a rating level from 1 to 5. The table has columns for 'Rating', 'Numeric Rating', and 'Description'. The 'Rating' column contains radio buttons. The 'Numeric Rating' column contains numbers from 1.00 to 5.00. The 'Description' column contains text describing the rating level. The 'Proficiencies' callout box is highlighted with a green border. A green arrow points from the 'Option 2' label to the 'Select Proficiency' button at the bottom of the callout box. A red box highlights the 'Employee Rating' dropdown menu, which is open and shows the same 5 rating options as the 'Proficiencies' table. The 'Option 1' label points to this dropdown menu.

Rating	Numeric Rating	Description
<input type="radio"/> 1. Does Not Meet Expectations	1.00	Does not demonstrate reliability or take responsibility for their own actions. Fails to maintain confidentiality; does not follow through on commitments; demonstrates a lack of support for the values of the university. If an employee is rated "Does Not Meet Expectations", please provide a detailed comment with evidence of rating.
<input type="radio"/> 2. Somewhat Meets Expectations	2.00	Occasionally demonstrates reliability and at times fails to follow through on commitments. Inconsistently takes responsibility for their own actions. Sometimes struggles to identify situations requiring confidentiality. Occasionally demonstrates a lack of support for the values of the university. If an employee is rated "Somewhat Meets Expectations", please provide a detailed comment with evidence of rating.
<input type="radio"/> 3. Meets Expectations	3.00	Demonstrates reliability and follows through on commitments with minimal follow-up and guidance. Takes responsibility for their own actions. Maintains confidentiality. Demonstrates support for the values of the university.
<input type="radio"/> 4. Exceed Expectations	4.00	Consistently demonstrates reliability and follows through on commitments without needing follow-up and guidance. Takes responsibility for their own actions and comes prepared with solutions. Maintains confidentiality and identifies potential risks. Demonstrates the values of the university through their actions.
<input type="radio"/> 5. Role Model	5.00	Models reliability and follows through on commitments, anticipating needs before they arise. Takes responsibility for their own actions and takes a proactive approach to implement long-term solutions. Actively works to consider areas where confidentiality is critical, and acts on potential risks. Champions the values of the university and influences others. If an employee is rated "Role Model", please provide a detailed comment with evidence of rating.

Step 6 of 12 – Core Values (Continued)

After you have rated yourself on each of the 6 Core Values, calculate all ratings.

There are 2 options for calculating all ratings.

Option 1: Select **Calculate All Ratings** at the top of the screen.

Option 2: Select the calculator symbol above the comments field in the Core Values Summary.

Performance Process

Performance Process

Steps and Tasks

<Employee Name>

UTSA Performance Evaluation

09/01/2024 - 08/31/2025 Overview

- Goal Setting Due Date 11/27/2023
- Goals Mid-Year Check In Due Date 03/28/2025
- Open Evaluation Due Date 03/28/2025
- Complete Self Evaluation Due Date 08/08/2025
 - Update and Complete
- Review Manager Evaluation Due Date 08/29/2025

UTSA Performance Evaluation

Self-Evaluation - Update and Complete

Enter your ratings and comments for each applicable section and **Save**. When you have finished updating your evaluation select the **Complete** button to save your changes and send this document to your manager for review.

Option 1

Calculate All Ratings

Goals Core Values Operation Excellence Core Competencies Summary

Section 2 - Core Values

We encourage an environment of dialogue and discovery, guided by our core values and reflected in how we fulfill our mission and realize our vision.

Expand Collapse

- Integrity
- Excellence
- Respect
- Collaboration
- Innovation

Core Values Summary

Employee Rating 0.00

Comments

Option 2

Spell Check

Step 7 of 12 – Operation Excellence

Select the **Operation Excellence** tab.

Click **Expand** to view.

Rate yourself on each indicator and add your comments, making sure to **Save** often.

The rating scale goes from 1=Does Not meet Expectations to 5=Role Model. (see below)

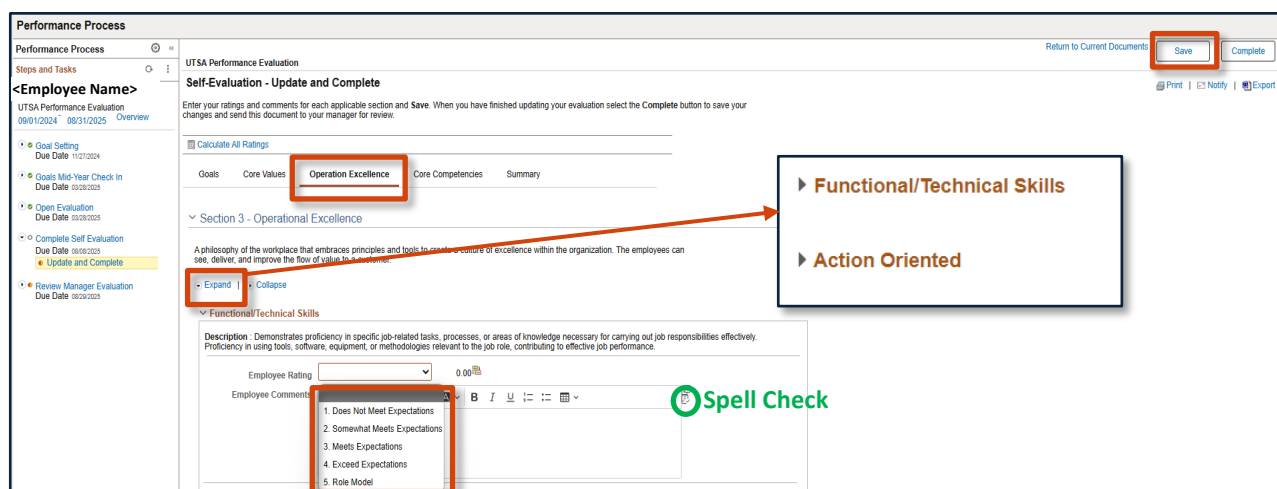
There are 2 options for rating yourself.

Option 1: Select a rating from the drop-down box in **Employee Rating**.

Option 2: Select this symbol:  A rubric will appear on the screen.

Rating Note: Goals are either achieved or not achieved and are not calculated as a part of the overall rating. The subsequent tabs are equally weighted in the overall summary rating.

Select the appropriate rating and then click **Select Proficiency**. Then click **Return**



The screenshot displays the 'Performance Process' interface for 'UTSA Performance Evaluation'. The 'Self-Evaluation - Update and Complete' section is active. The 'Operation Excellence' tab is selected and expanded, showing a description of the workplace philosophy and a list of indicators. A rating scale is visible at the bottom, ranging from 1 (Does Not Meet Expectations) to 5 (Role Model). A 'Save' button is highlighted in the top right corner. A 'Spell Check' icon is also visible.

Note: This job aid is based on an Individual Contributor evaluation. If you are in a different role, your tabs will have different labels, but the process remains the same.

After you have rated yourself in each area, calculate ratings using either of the options explained in Step 6 (page 7). Make sure to **Save** often.

Step 8 of 12 – Core Competencies

Select the **Core Competencies** tab.

Click **Expand** to review.

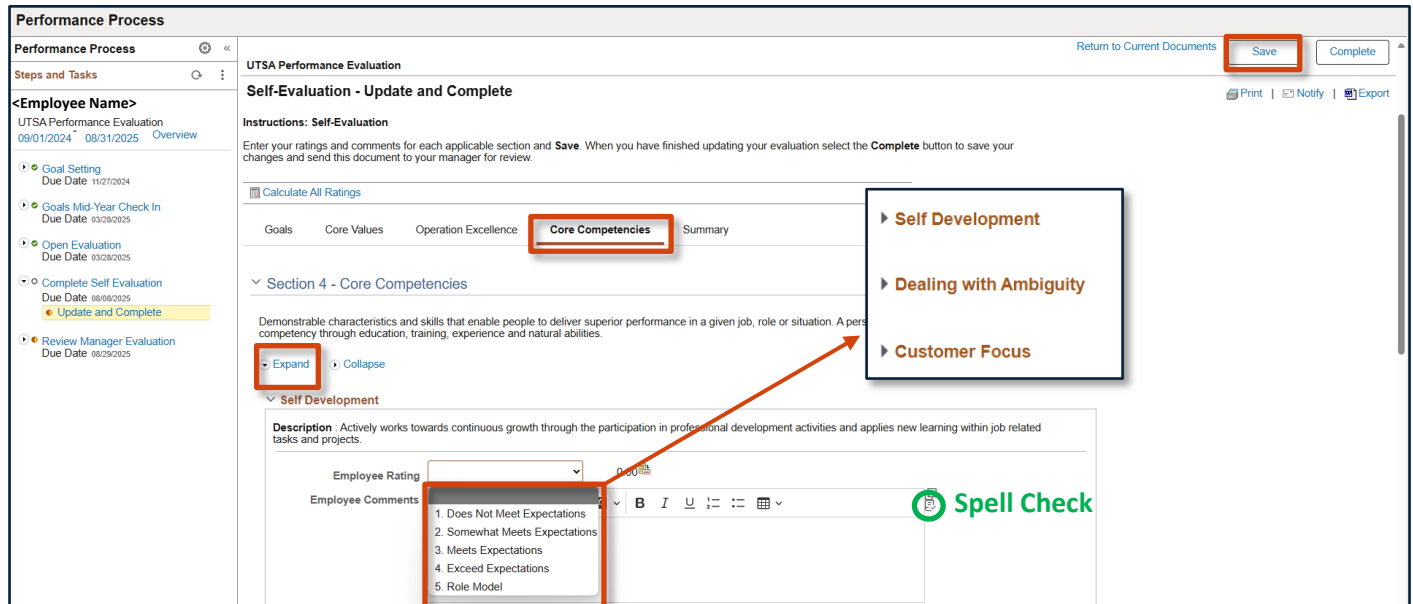
Rate yourself on each section and add your comments, making sure to **Save** often.

The rating scale goes from 1=Does Not meet Expectations to 5=Role Model. (See below)

There are 2 options for rating yourself.

Option 1: Select a rating from the drop down box in **Employee Rating**.

Option 2: Select this symbol:  A rubric will appear on the screen.



Performance Process

UTSA Performance Evaluation

Return to Current Documents **Save** Complete

Steps and Tasks

<Employee Name>

UTSA Performance Evaluation
09/01/2024 - 08/31/2025 Overview

- Goal Setting
Due Date: 11/27/2024
- Goals Mid-Year Check In
Due Date: 03/28/2025
- Open Evaluation
Due Date: 03/28/2025
- Complete Self Evaluation
Due Date: 08/08/2025
 - Update and Complete
- Review Manager Evaluation
Due Date: 08/29/2025

Self-Evaluation - Update and Complete

Instructions: Self-Evaluation
Enter your ratings and comments for each applicable section and **Save**. When you have finished updating your evaluation select the **Complete** button to save your changes and send this document to your manager for review.

Calculate All Ratings

Goals Core Values Operation Excellence **Core Competencies** Summary

Section 4 - Core Competencies

Demonstrable characteristics and skills that enable people to deliver superior performance in a given job, role or situation. A person's competency through education, training, experience and natural abilities.

Expand Collapse

Self Development

Description: Actively works towards continuous growth through the participation in professional development activities and applies new learning within job related tasks and projects.

Employee Rating: 5.00

Employee Comments

1. Does Not Meet Expectations
2. Somewhat Meets Expectations
3. Meets Expectations
4. Exceed Expectations
5. Role Model

Self Development
Dealing with Ambiguity
Customer Focus

Spell Check

Note: After you have rated yourself in each area, calculate all ratings using either of the options explained in Step 6 (page 7).

Make sure to **Save** often.

Note: The competencies have been divided into two tabs with an equal distribution of weight across Core Values, Operation Excellence and Core Competencies. Each weighing one third of the overall summary rating.

Step 9 of 12 – Summary

Select the **Summary** tab and enter **Overall Summary** comments.

Select **Calculate All Ratings** or the calculator icon next to the Employee Rating field to calculate the total average **Employee Rating**.

Save to keep your changes.

Performance Process

UTSA Performance Evaluation

Return to Current Documents

Save **Complete**

Self-Evaluation - Update and Complete

Instructions: Self-Evaluation

Enter your ratings and comments for each applicable section and **Save**. When you have finished updating your evaluation select the **Complete** button to save your changes and send this document to your manager for review.

Calculate All Ratings

Goals Core Values Operation Excellence Core Competencies **Summary**

Section 5 - Overall Summary

Employee Rating 0.00

Comments

Save **Complete**

Print | Notify | Export

Step 10 of 12 – Save

Select **Save** to keep your changes. This allows you to come back later to edit if you need more time to submit.

Save **Complete**

Print | Notify | Export

Step 11 of 12 – Complete

If you are done with your self-evaluation, click **Complete**. Your manager will receive an email once your employee self-evaluation is completed.

Performance Process

Performance Process

Steps and Tasks

- Goal Setting
Due Date 11/27/2024
- Goals Mid-Year Check In
Due Date 03/28/2025
- Open Evaluation
Due Date 03/28/2025
- Complete Self Evaluation
Due Date 08/08/2025
 - Update and Complete
- Review Manager Evaluation
Due Date 08/29/2025

UTSA Performance Evaluation

Self-Evaluation - Update and Complete

Return to Current Documents
Save
Complete

Print
Notify
Export

Instructions: Self-Evaluation

Enter your ratings and comments for each applicable section and **Save**. When you have finished updating your evaluation select the **Complete** button to save your changes and send this document to your manager for review.

Calculate All Ratings

Goals
Core Values
Operation Excellence
Core Competencies
Summary

Section 5 - Overall Summary

Employee Rating 3.75

Comments

Complete Evaluation

You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.

Confirm

Cancel

UTSA Performance Evaluation

Confirmation - Document Completed

✔ You have successfully completed your evaluation.

Step 12 of 12 – Employee Acknowledgement

Once you have met with your manager and are ready to confirm the performance evaluation, select your **UTSA Performance Evaluation**.

Performance

<Employee Name>
RESEARCH SCI ASSOCIATE V

My Current Documents 2

My Historical Documents
Evaluations of Others 0
Historical Evaluations of Others

My Current Documents

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Probationary Review	Track Progress - Checkpoint #1- 45 Day	06/03/2025 12/03/2025	07/21/2025 >
UTSA Performance Evaluation	Pending Acknowledgement	09/01/2024 08/31/2025	08/29/2025 >

Review the **EE Acknowledgement** tab and add your comments.

Then select **Acknowledge** after you and your manager have reviewed the document.

Performance Process

Performance Process

Steps and Tasks

- UTSA Performance Evaluation
 - 09/01/2024 - 08/31/2025 Overview
 - Goal Setting Due Date 11/27/2024
 - Goals Mid-Year Check In Due Date 03/28/2025
 - Open Evaluation Due Date 03/28/2025
 - Complete Self Evaluation Due Date 08/08/2025
 - Review Manager Evaluation Due Date 08/29/2025
 - Acknowledge** View

UTSA Performance Evaluation

Save Acknowledge

Print | Notify | Export

Manager Evaluation - Acknowledge

<Employee Name>

Job Title POSITION
Document Type UTSA Performance Evaluation
Template Individual Contributor: FY2025
Status Pending Acknowledgement
Manager <<Manager Name>
Period 09/01/2024 - 08/31/2025
Document ID 12345
Due Date 08/29/2025

Employee Data

Department AEN006 KCEID BIOMED ENG CHEMICAL ENG

Instructions: Self-Evaluation
This document is currently waiting for your acknowledgment.
Provide any final feedback in the **EE Acknowledgement** tab. Click Save and then select the **Acknowledge** button to confirm that you and your manager have discussed this document.

Goals Core Values Operation Excellence Core Competencies Summary

EE Acknowledgement

Section 6 - Employee Comments

Employee Comments

Employee Comments here

Step 12 of 12 – Employee Acknowledgment (Continuation)

Confirm that you and your manager have reviewed the document.

The screenshot shows the 'Performance Process' interface for 'UTSA Performance Evaluation'. The left sidebar lists steps: Goal Setting, Goals Mid-Year Check In, Open Evaluation, Complete Self Evaluation, and Review Manager Evaluation. The main area displays 'Manager Evaluation - Acknowledge' with fields for Employee Name, Job Title, Position, Manager, and Manager Name. A modal dialog titled 'Acknowledge Review Held' is open, asking for confirmation. The 'Confirm' button is highlighted with a red box. Below the dialog, the 'EE Acknowledgement' section is visible, showing 'Section 6 - Employee Comments'.

The message below will appear on the screen confirming that you have completed the **Employee Acknowledgement**.

The screenshot shows the 'Performance Process' interface with a confirmation message. The left sidebar is the same as the previous screenshot. The main area displays 'UTSA Performance Evaluation' with a red-bordered box containing the text 'Confirmation - Employee Acknowledgement'. Below this, a green checkmark icon is followed by the text: 'You have successfully acknowledged this document.'

