

**UTSA** People Excellence

# Employee Self-Evaluation Guide

## Employee Self-Evaluation –ePerformance Guide

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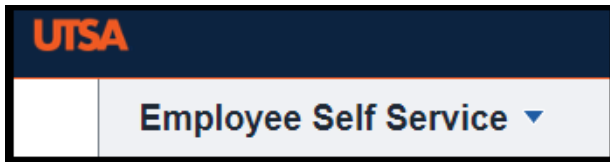
### Self-Evaluation Overview

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](#).



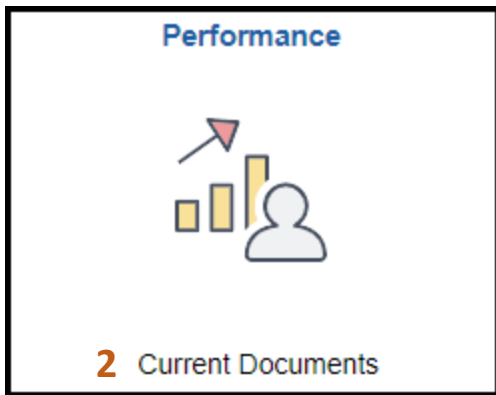
### Step 1 of 12 – Employee Self-Service

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

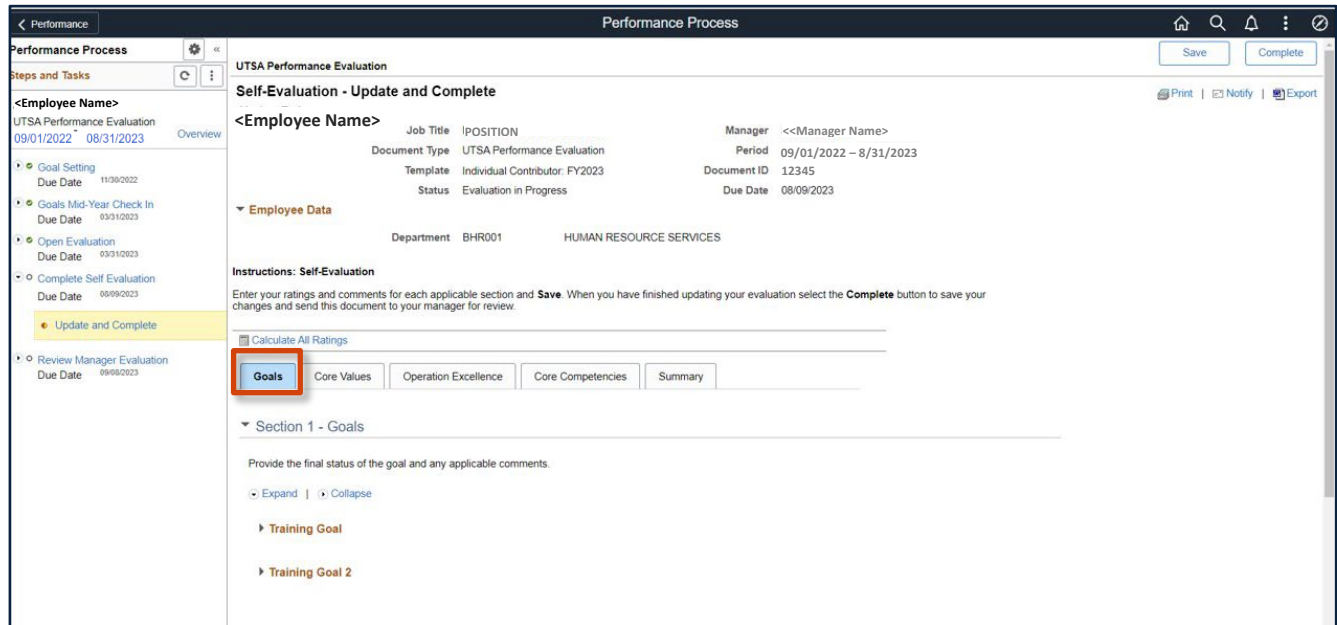
The performance documents will appear under **My Current Documents**. Select **UTSA Performance Evaluation**.

**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.

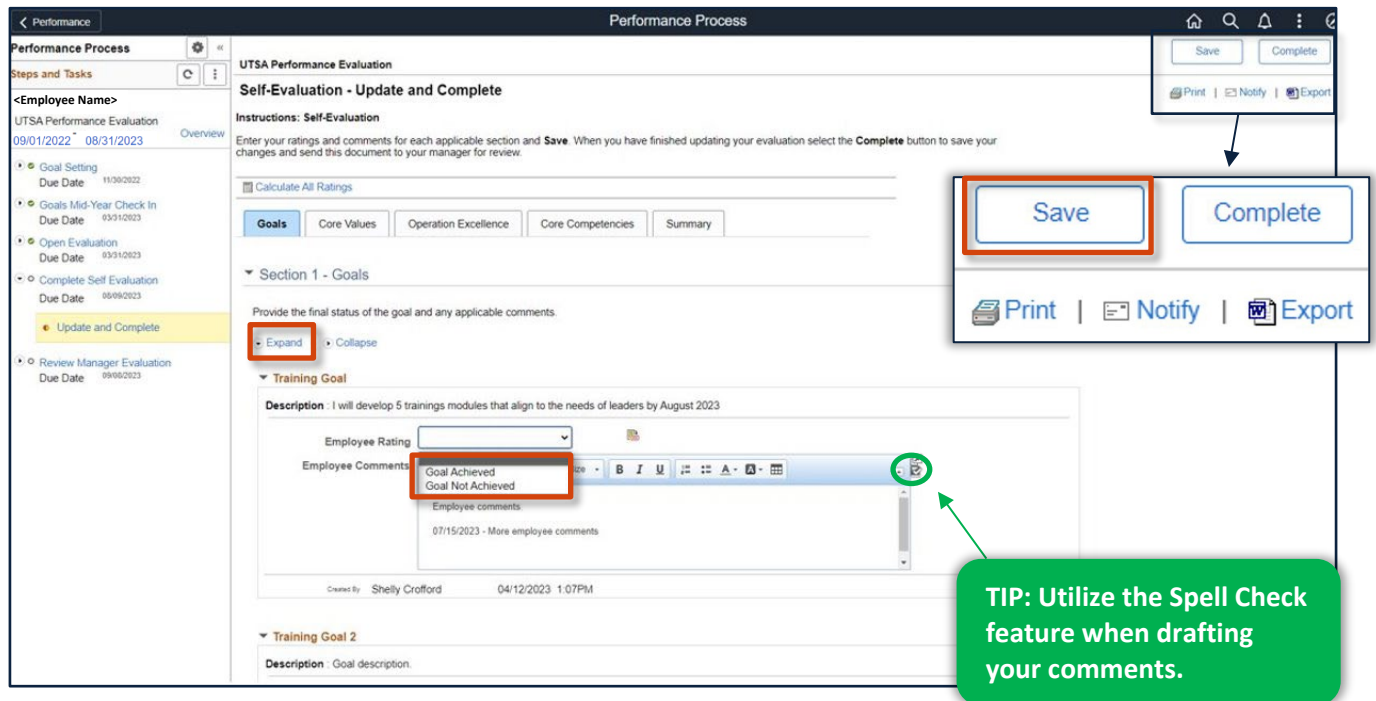
A screenshot of the 'My Current Documents' section in the Performance tile. The table lists two documents. The second document, 'UTSA Performance Evaluation', is highlighted with a red box. The table has columns for Document Type, Document Status, Period Begin / Period End, and Next Due Date.

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Probationary Review	Track Progress - Checkpoint #3: 160 Days	12/07/2022 06/07/2023	05/18/2023
UTSA Performance Evaluation	Evaluation In Progress	09/01/2022 08/31/2023	08/09/2023

Step 4 of 12 – Goals  
 Select the **Goals** tab.



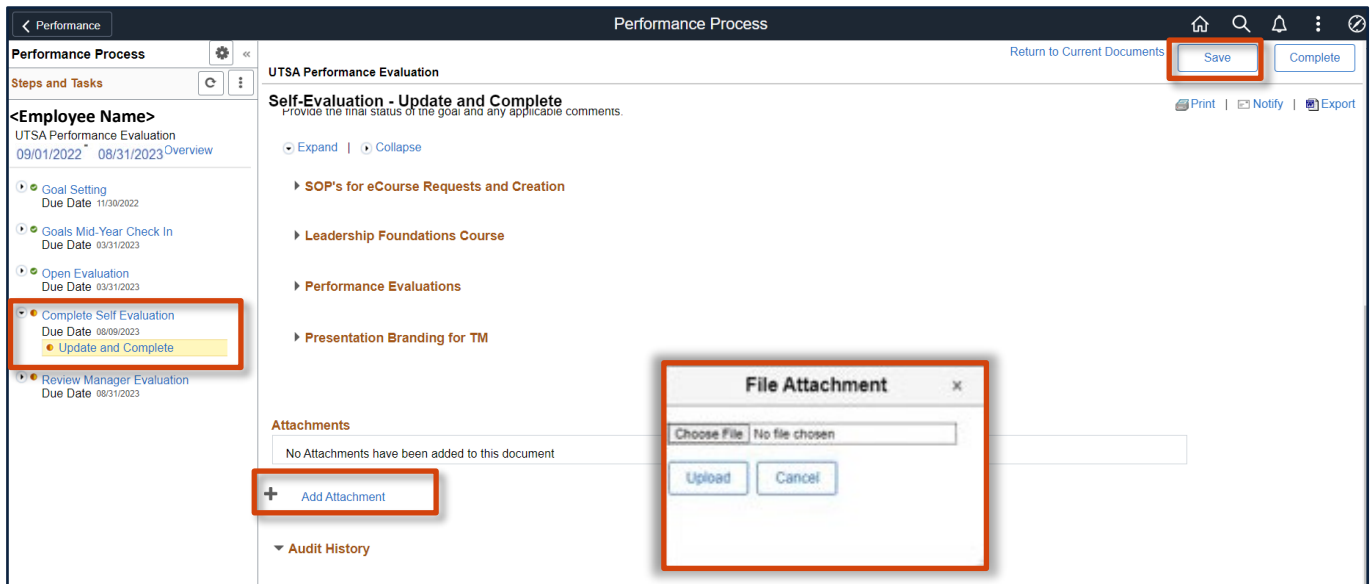
Select **Expand** to review goals.  
 Rate yourself on each goal and add your comments, making sure to **Save** often.  
 (The rating scale has 2 choices: Goal Achieved or Goal Not Achieved.)



### Step 5 of 12 – Adding Attachments

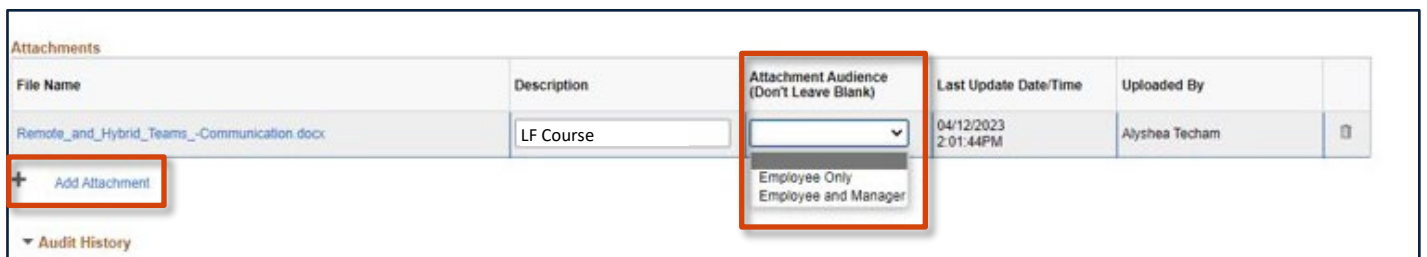
You have the ability to attach documents. These documents can include examples of your work, certifications and/or other documents you feel demonstrate your performance throughout the year.

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.

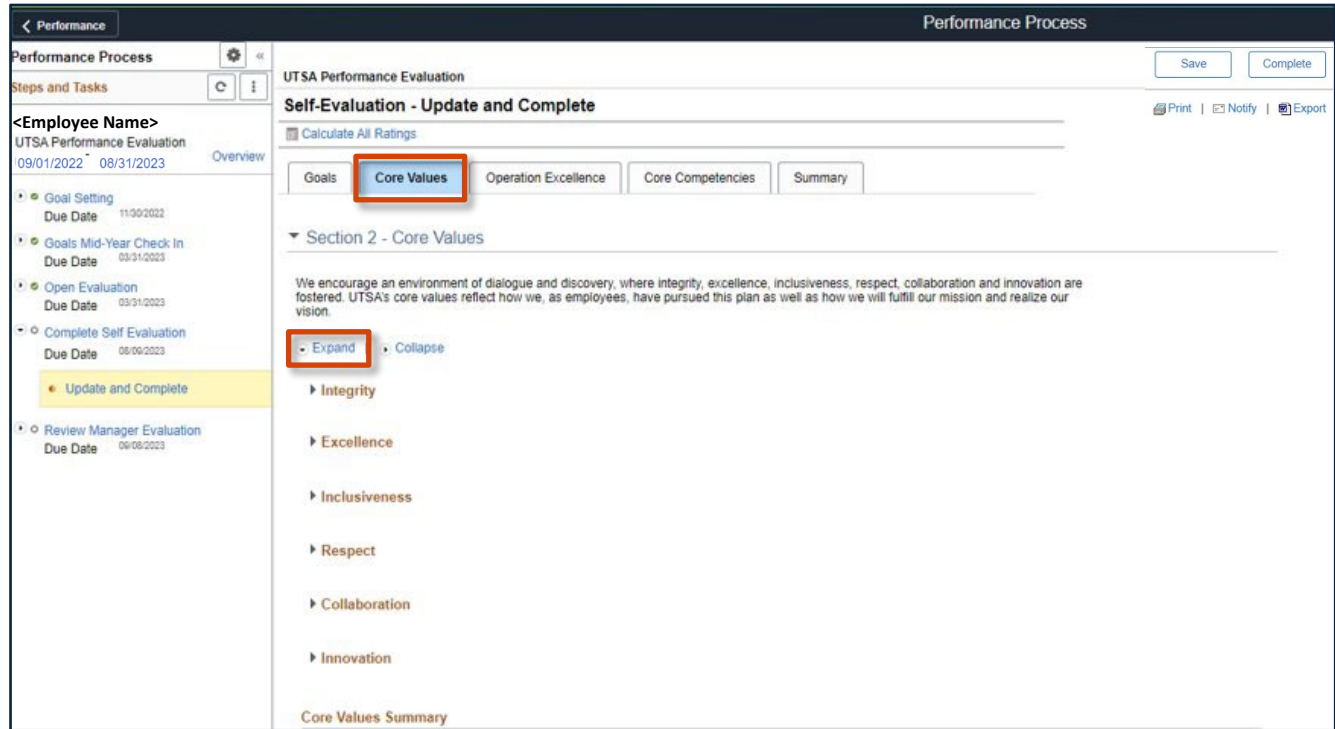
For your manager to view the documents when they are completing the Manager Evaluation, you must select Employee and Manager in the Attachment Audience.



**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.

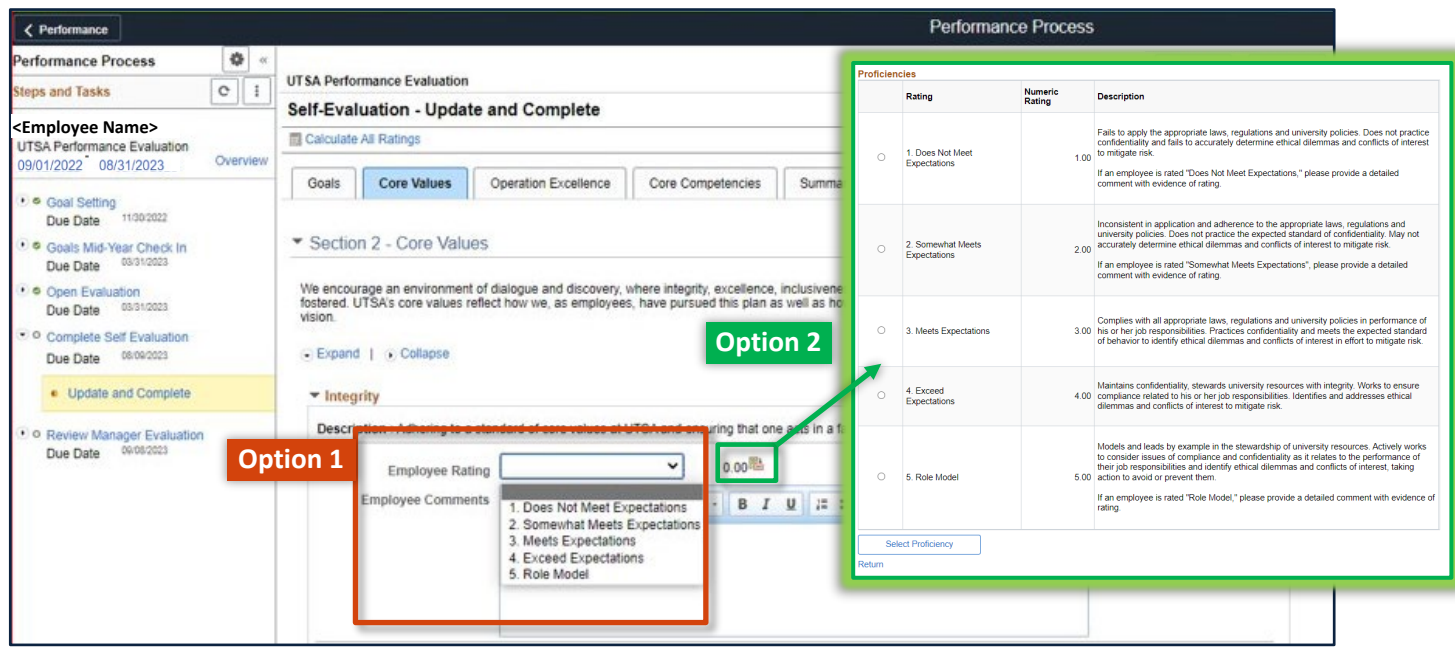


Rate yourself on each Core Value and add your comments, making sure to **Save** often. The rating scale goes from 1=Does Not meet Expectations to 5=Role Model. (see below) There are 2 options for rating yourself.

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**.



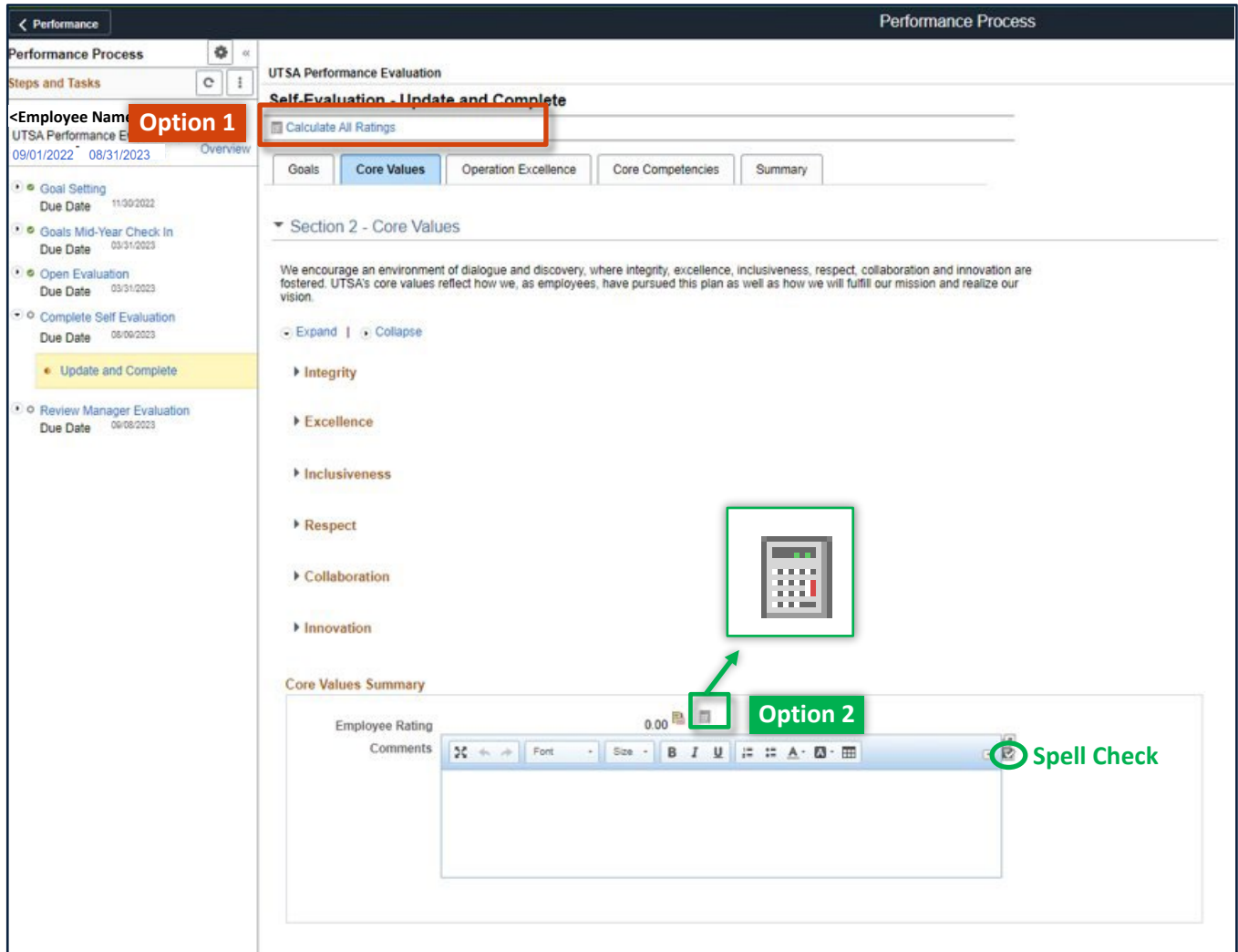
Step 6 of 12 – Core Values (Continued)

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.





### 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.

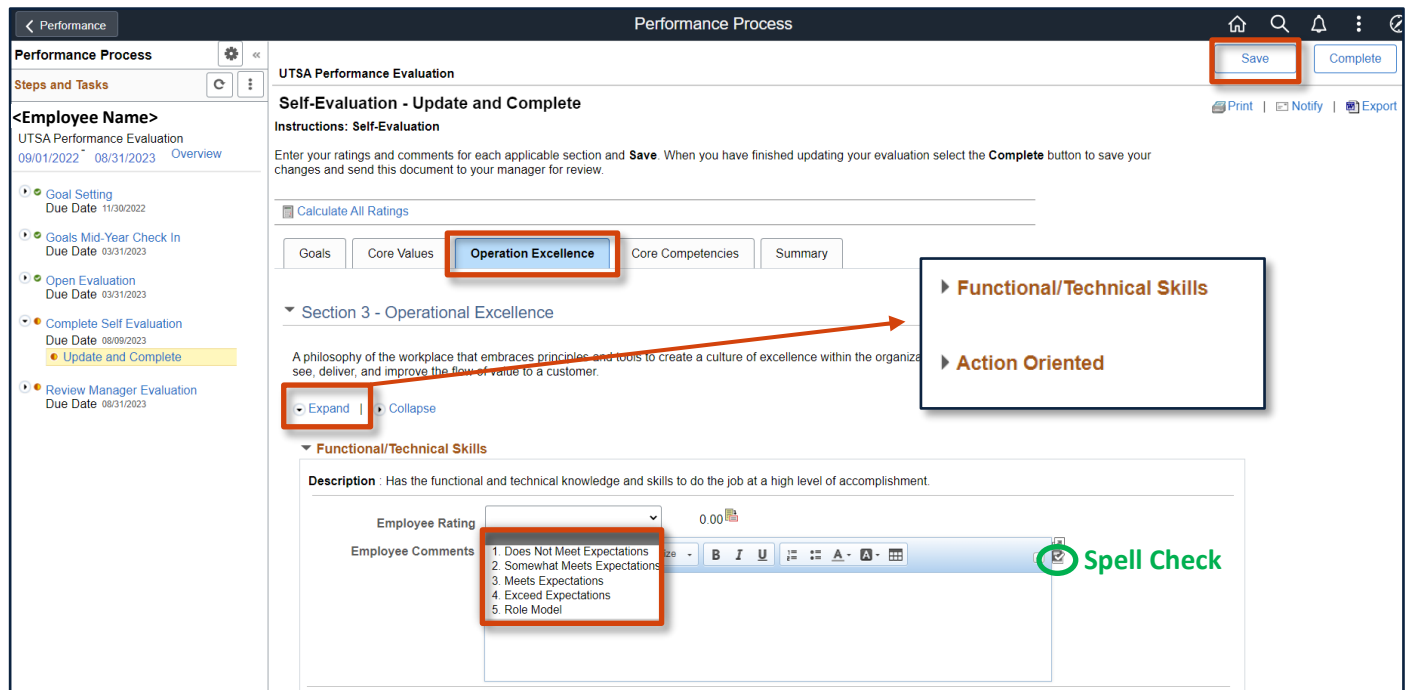
The rating scale goes from 1=Does Not meet Expectations to 5=Role Model. (see below)

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.



**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.

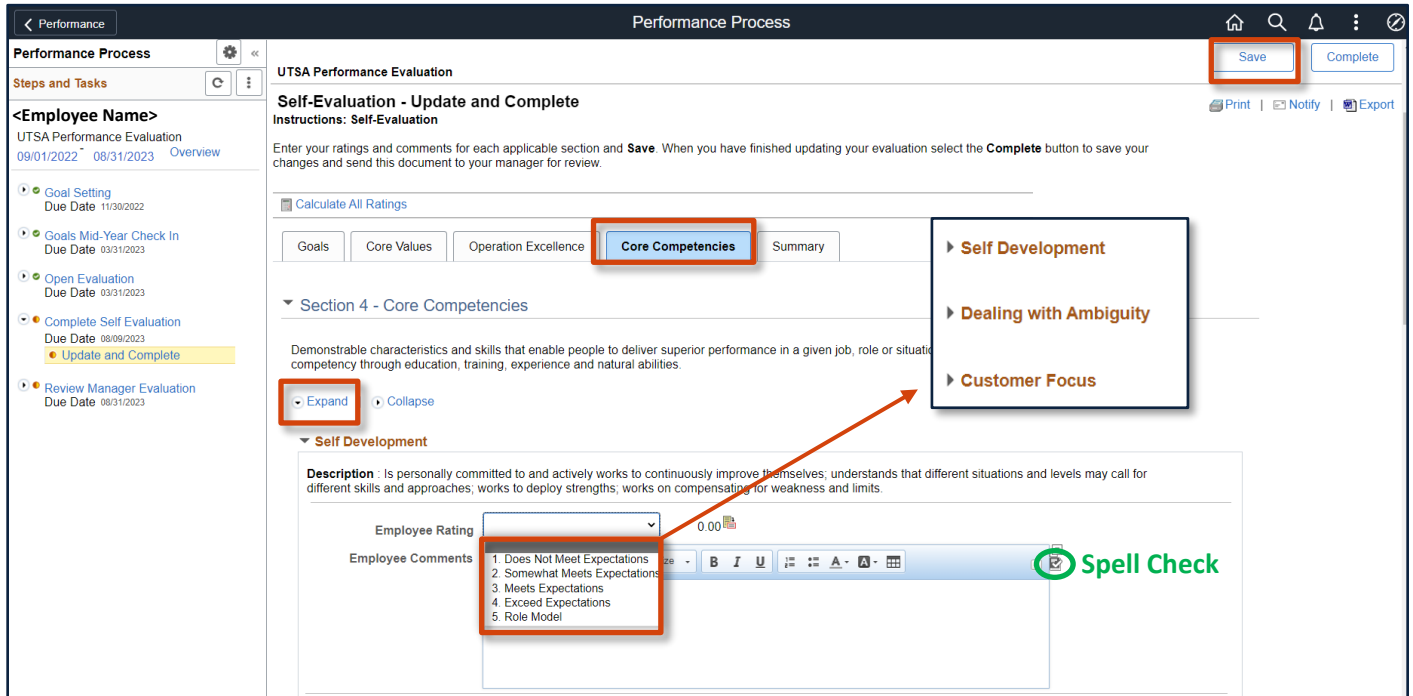
Rate yourself on each section and add your comments, making sure to **Save** often.

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.



**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.

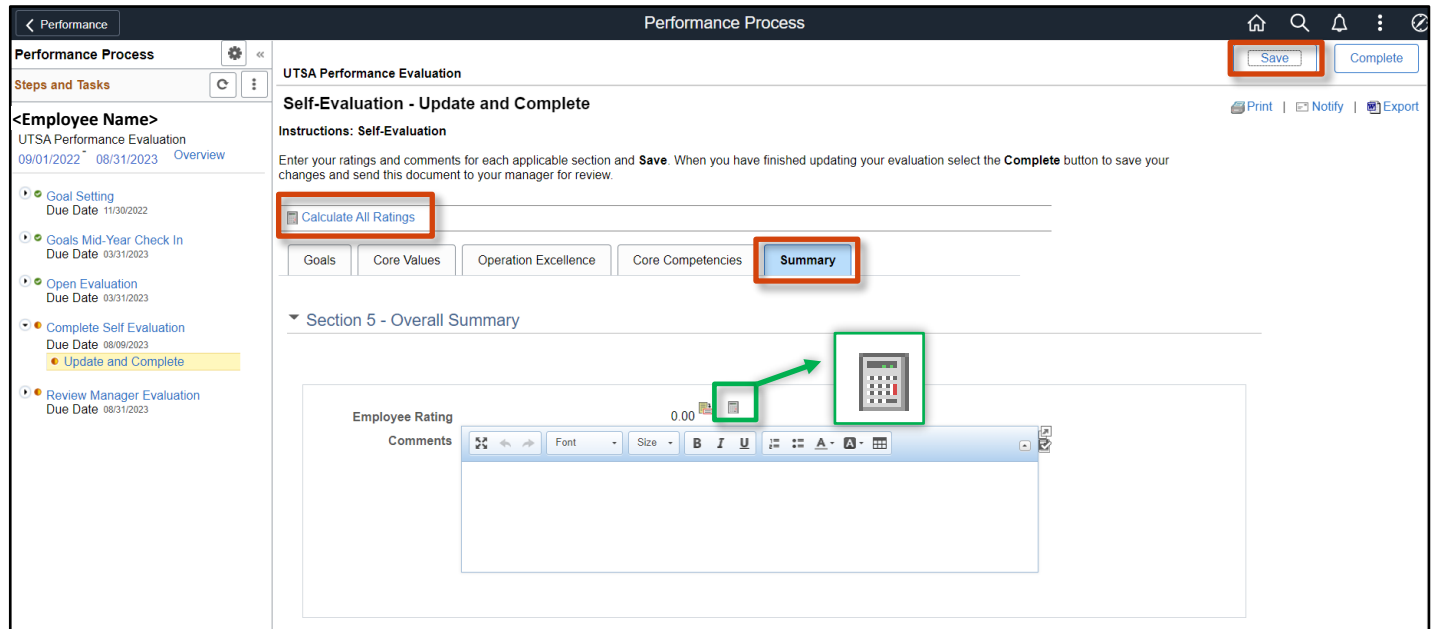
**Note:** The competencies have been divided into two tabs with an equal distribution of weight across Core Values, Operation Excellence and Core Competencies. Each weighing one third of the overall summary rating.

### Step 9 of 12 – Summary

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

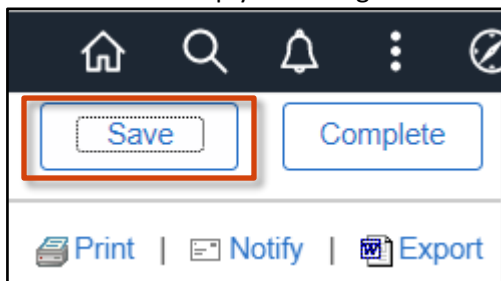
Select **Calculate All Ratings** or the calculator icon next to the Employee Rating field to calculate the total average **Employee Rating**.

**Save** to keep your changes.



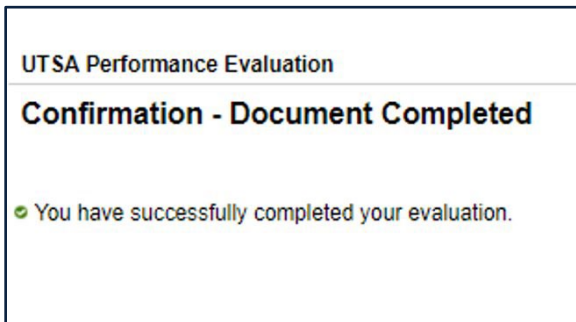
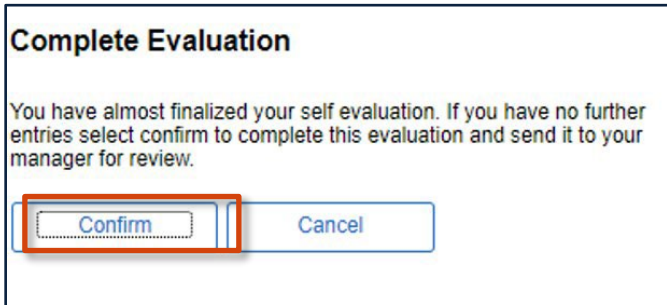
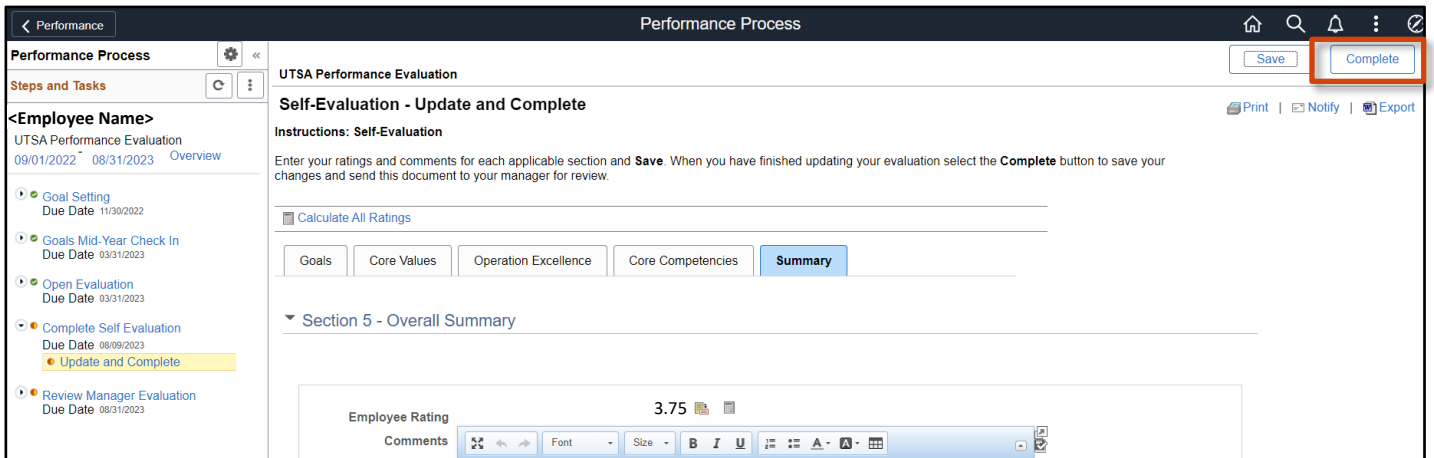
### Step 10 of 12 – Save

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



### 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.



### 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**.

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Probationary Review	Track Progress - Checkpoint #3: 160 Days	12/07/2022 06/07/2023	05/18/2023
UTSA Performance Evaluation	Pending Acknowledgement	08/31/2023 09/01/2022	08/31/2023

Review the **EE Acknowledgement** tab and add your comments. Then select **Acknowledge** after you and your manager have reviewed the document.

**Performance Process**

UTSA Performance Evaluation

**Manager Evaluation - Acknowledge**

<Employee Name>

Job Title: POSITION  
 Document Type: UTSA Performance Evaluation  
 Template: Individual Contributor: FY2023  
 Status: Pending Acknowledgement

Manager: <<Manager Name>>  
 Period: 09/01/2022 – 8/31/2023  
 Document ID: 12345  
 Due Date: 08/31/2023

**Employee Data**

Department: BHR001 HUMAN RESOURCE SERVICES

**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**

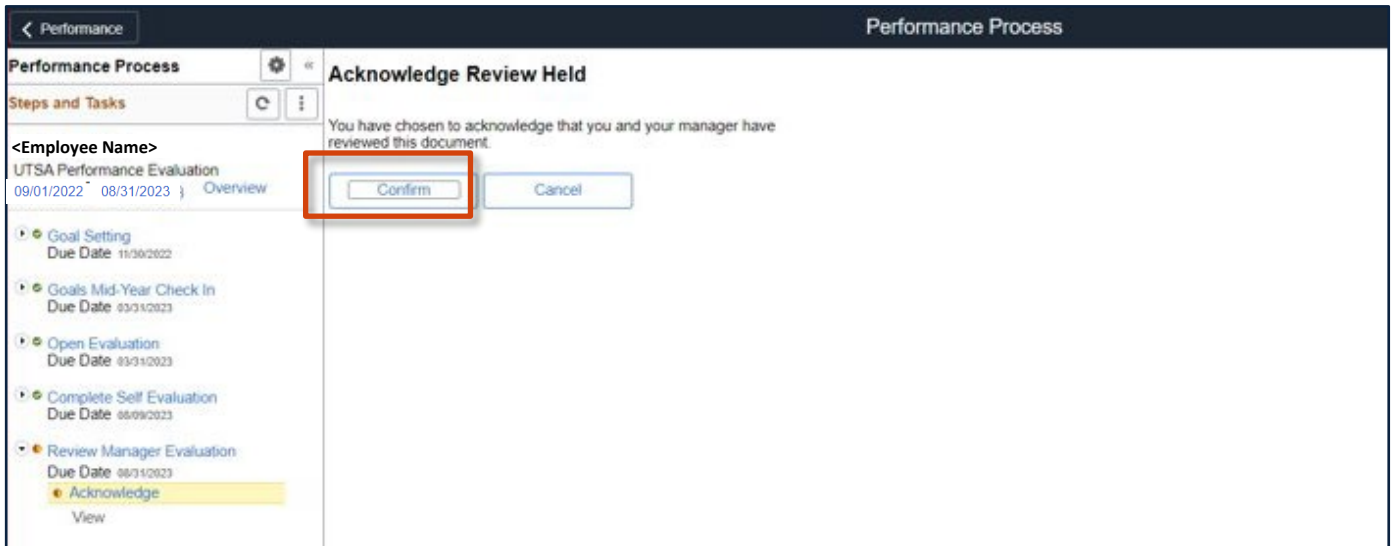
**Section 6 - Employee Comments**

Employee Comments

Employee Comments here

Step 12 of 12 – Employee Acknowledgment (Continuation)

Confirm that you and your manager have reviewed the document.



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

