

UTSA People Excellence

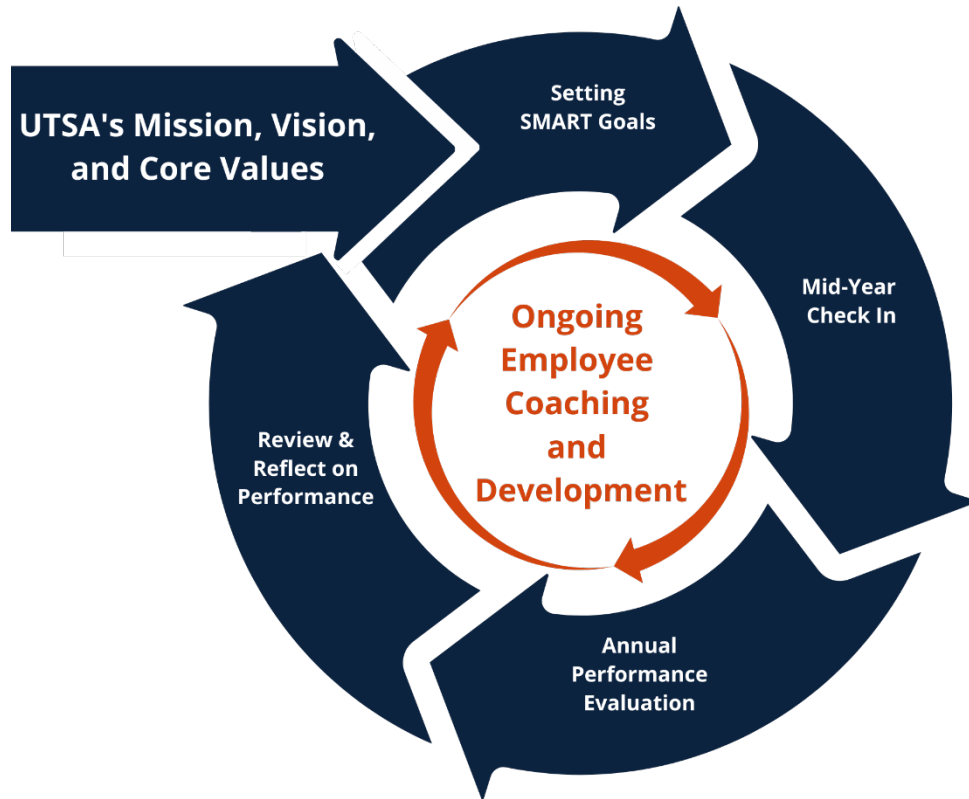
Manager Guide To Evaluating Employees

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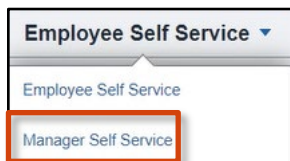
Overview

The Manager Evaluation portion of the UTSA Annual Performance Evaluation provides the manager an opportunity to review and provide feedback on employee progress towards established goals and performance as it relates to the core values and core competencies of the university. During this process, the employee and manager review each section of the evaluation providing comments and ratings based on performance. The year-end process includes time for the employee and manager to discuss performance, review manager assigned ratings and begin setting goals for the year ahead. This resource assists in the technical side of completing this step. For assistance, please reach out to [Talent Management](#).



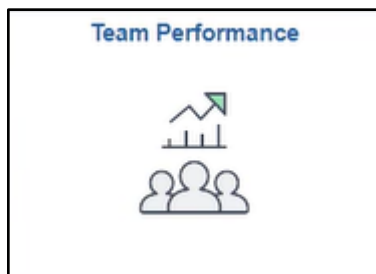
Step 1 of 15 – Manager Self-Service

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



Step 2 of 15 – Performance Tile

Select the **Team Performance** tile.



Step 3 of 15 – Current Documents

A list of available **Current Documents** will appear. Select an employee to continue.

Team Performance

Current Documents

Historical Documents

View-Only Documents

Approve Documents

Current Documents

10 rows

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date	
Employee Name POSTDOCTORAL FELLOW	UTSA Performance Evaluation	Define Criteria	09/01/2025 08/31/2026	11/28/2025	>
Employee Name ADMIN SERVICES OFFICER I	UTSA Performance Evaluation	Evaluation in Progress	09/01/2024 08/31/2025	08/08/2025	>
Employee Name Senior Program Manager	UTSA Performance Evaluation	Evaluation in Progress	09/01/2024 08/31/2025	08/08/2025	>

TIP – If the document status does not say "Evaluation in Progress", you may need to open the Evaluation.

(See *Feature – Open Evaluation* on page 16.)

Step 4 of 15 – Verify

Verify the employee's name.

Performance Process

Performance Process

Steps and Tasks

Employee Name

UTSA Performance Evaluation

09/01/2024 08/31/2025 Overview

- Goal Setting
Due Date 11/27/2024
- Goals Mid-Year Check In
Due Date 03/28/2025
- Open Evaluation
Due Date 03/28/2025
- Review Self Evaluation
Due Date 08/08/2025
- Complete Manager Evaluation
Due Date 08/29/2025
 - Update and Submit
 - Pending Approval
 - Share with Employee
 - Pending Acknowledgement

UTSA Performance Evaluation

Save

Submit for Approval

Manager Evaluation - Update and Submit

Employee Name

Actions

Job Title

ADMIN SERVICES OFFICER I

Manager

Manager Name

Document Type

UTSA Performance Evaluation

Period

09/01/2024 08/31/2025

Template

Individual Contributor: FY2025

Document ID

1234

Status

Evaluation in Progress

Due Date

08/29/2025

Employee Data

Department

CTR042

Department Name

Instructions: Manager Evaluation

Enter ratings and comments for each section of the evaluation. The system requires comments for ratings of 1, 2 and 5 along with summary ratings prior to submitting for final approval.

Remember to SAVE often.

When all ratings are entered, click **Save**. Do not submit the evaluation at this time.

Calculate All Ratings

Goals

Core Values

Operation Excellence

Core Competencies

Summary

EE Acknowledgement

Section 1 - Goals

Step 5 of 15 – Review Employee Attachments

To see the employee's attachments, you must open the Self Evaluation. Go to **Review Self-Evaluation** and click **View**.

Performance Process

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

Review Self Evaluation
 Due Date 08/08/2025

[View](#)

Complete Manager Evaluation
 Due Date 08/29/2025

Scroll down to find the **Attachments** section. All attachments will be located in the same section, regardless of what tab they were originally added.

To view the attachment, **Click the File Name**.

Click **Save** to attach to the Manager Evaluation.

NOTE: Employees are not required to upload attachments. If you do not see an attachment, verify with the employee that they did not include any attachments.

Self-Evaluation - Completed

UTSA Performance Evaluation

Self-Evaluation - Completed

Section 1 - Goals

Provide the final status of the goal and any applicable comments.

Expand | Collapse

Training Goal

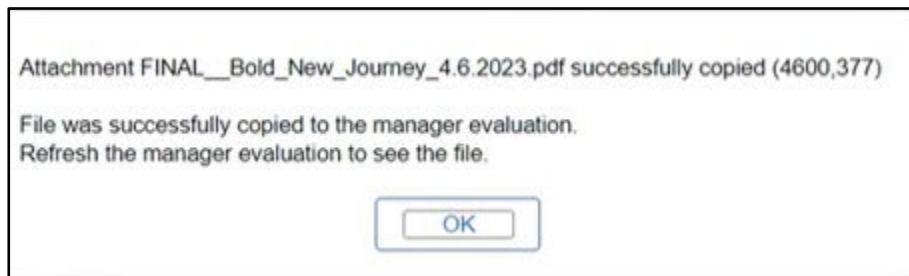
Training Goal 2

Attachments

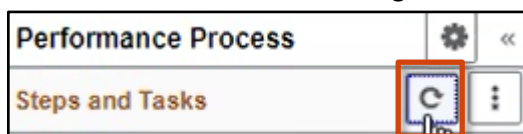
File Name	Description	Attachment Audience (Don't Leave Blank)	Last Update Date/Time	Uploaded By	Save to Manager Evaluation
FINAL_Bold_New_Journey_4.6.2023.pdf	Employee and Manager	Employee and Manager	04/17/2023 5:04:34PM	Employee Name	Save
New_Employee_1_Week_Touchbase_email.pdf	Employee and Manager	Employee and Manager	04/17/2023 5:07:22PM	Employee Name	Save
April_-_May_2023_Classes_Flyer.pdf	Employee and Manager	Employee and Manager	04/17/2023 5:07:22PM	Employee Name	Save
Remote_and_Hybrid_Teams_-_Communication.docx	Employee and Manager	Employee and Manager	04/17/2023 5:07:22PM	Employee Name	Save

Step 5 of 15 – Review Employee Attachments (Continued)

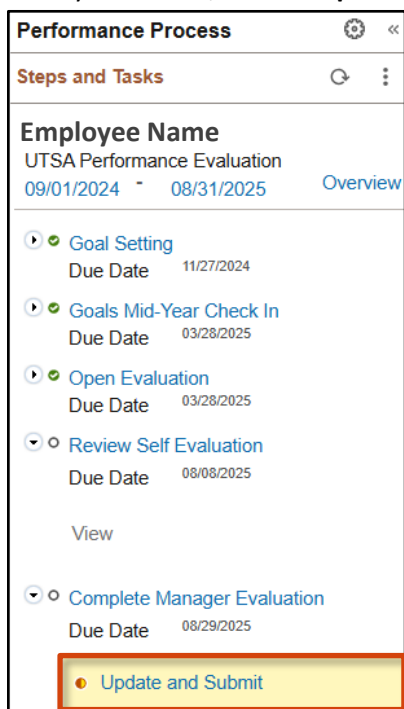
You will get this pop-up:



You'll need to **Refresh** the Manager Evaluation to view the file(s). To refresh, **Click the Icon** below:



After you refresh, click **Complete Manager Evaluation** then **Update and Submit**.



Step 6 of 15 – Evaluate Goals

Select the **Goals** tab, **Rate** the employee on each competency, then provide **Comments** for each goal, making sure to **Save** along the way. The rating choices are Goal Achieved or Goal Not Achieved. As you begin to rate the employee, you will be able to view the rating they gave themselves just below your comment box.

The screenshot displays the 'Performance Process' interface for 'UTSA Performance Evaluation'. The left sidebar lists steps: 'Goal Setting', 'Goals Mid-Year Check In', 'Open Evaluation', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Update and Submit' step is highlighted. The main area shows the 'Manager Evaluation - Update and Submit' page with a 'Goals' tab selected. Under 'Section 1 - Goals', there is a 'Training Goal' with a description: 'I will complete all the necessary experiments for the <sample> project and write up a manuscript for publication.' Below the description, there is a 'Manager Rating' dropdown menu with options 'Goal Achieved' and 'Goal Not Achieved'. A 'Manager Comments' text area is also present. A 'Save' button is located at the top right of the main area. A green callout box points to a spell check icon in the comments area.

TIP – Utilize the Spell Check feature when adding your comments.

Step 7 of 15 – Evaluate 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 and Tasks' including 'Goal Setting', 'Goals Mid-Year Check In', 'Open Evaluation', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Update and Submit' step is highlighted. The main area is titled 'UTSA Performance Evaluation' and 'Manager Evaluation - Update and Submit'. It includes a 'Calculate All Ratings' button and a tabbed interface with 'Goals', 'Core Values' (selected), 'Operation Excellence', 'Core Competencies', 'Summary', and 'EE Acknowledgement'. Under 'Section 2 - Core Values', there is a paragraph of text and a list of core values: Integrity, Excellence, Respect, Collaboration, and Innovation. The 'Expand' button is highlighted with a red box.

Rate the employee on each competency, then provide **Comments** for each core value, making sure to **Save** often. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model. There are 2 options for rating the employee.

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

NOTE: Manager comments are required for Ratings of 1, 2, and 5.

As you begin to rate the employee, you will be able to view the rating they gave themselves just below your rating.

This screenshot shows the same interface as the previous one, but with a 'Rating Model' pop-up window open. The pop-up displays a table with columns for 'Rating', 'Numeric Rating', and 'Description'. The ratings range from 1 (Does Not Meet Expectations) to 5 (Role Model). A green arrow points from the 'Rating Model' pop-up to the 'Manager Rating' dropdown menu. The dropdown menu is open, showing the same five rating options. A red box highlights the dropdown menu, and a green box highlights the 'Rating Model' pop-up. A green label 'Option 2' is placed near the pop-up. A red label 'Option 1' is placed near the dropdown menu. The 'Save' button is highlighted with a red box in the top right corner.

Rating	Numeric Rating	Description
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.
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.
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.
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.
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.

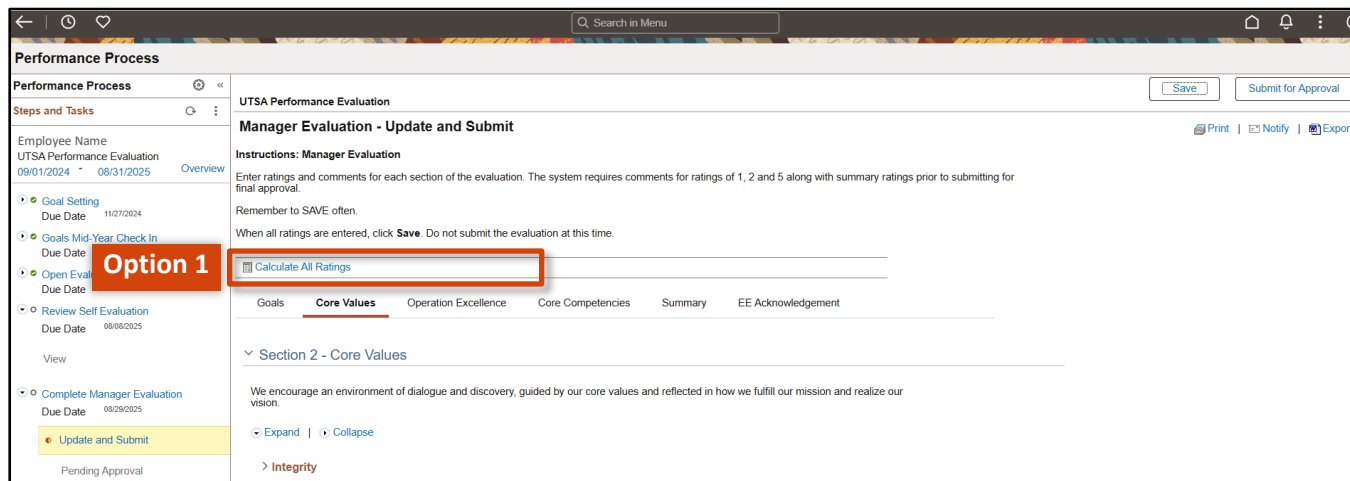
Step 7 of 15 – Evaluate Core Values (Continued)

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

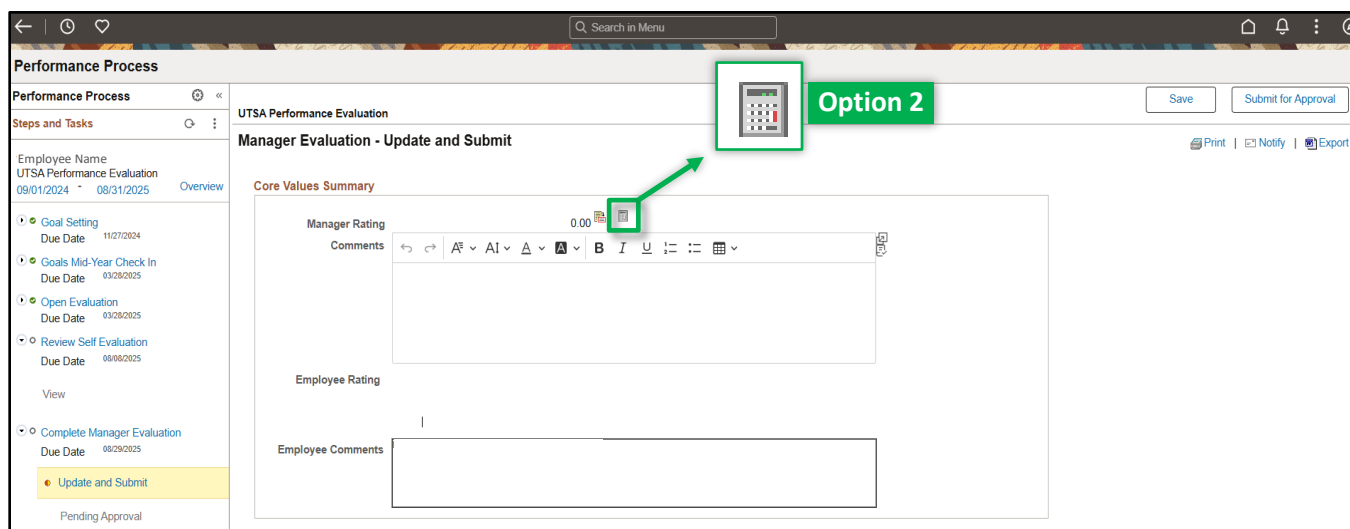
There are 2 options for calculating all ratings.

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.



The screenshot shows the 'Performance Process' screen for 'UTSA Performance Evaluation'. On the left sidebar, under 'Steps and Tasks', the 'Update and Submit' step is highlighted. In the main content area, under 'Manager Evaluation - Update and Submit', there is a section for 'Core Values'. A red box highlights the 'Calculate All Ratings' button located above the 'Core Values' section. A red label 'Option 1' points to this button.



The screenshot shows the 'Performance Process' screen for 'UTSA Performance Evaluation'. In the main content area, under 'Manager Evaluation - Update and Submit', there is a section for 'Core Values Summary'. A green box highlights a calculator icon located above the 'Manager Rating' field. A green label 'Option 2' points to this icon.

Step 8 of 15 – Evaluate Operation Excellence & Core Competencies

Repeat the same process for **Operation Excellence** and **Core Competencies** tabs.

Note: People Leaders and Executives have different tabs and competencies however the same steps apply.

Performance Process

UTSA Performance Evaluation

Manager Evaluation - Update and Submit

Calculate All Ratings

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

Section 3 - Operational Excellence

A philosophy of the workplace that embraces principles and tools to create a culture of excellence within the organization. The employees can see, deliver, and improve the flow of value to a customer.

Expand Collapse

Functional/Technical Skills

Action Oriented

Description: A self-starter ready to take initiative, make decisions, and actively address tasks and challenges to achieve desired outcomes.

Manager Rating: 0.00

Manager Comments: 1. Does Not Meet Expectations, 2. Somewhat Meets Expectations, 3. Meets Expectations, 4. Exceed Expectations, 5. Role Model

Employee Rating

Employee Comments

Save Submit for Approval


Print Notify Export

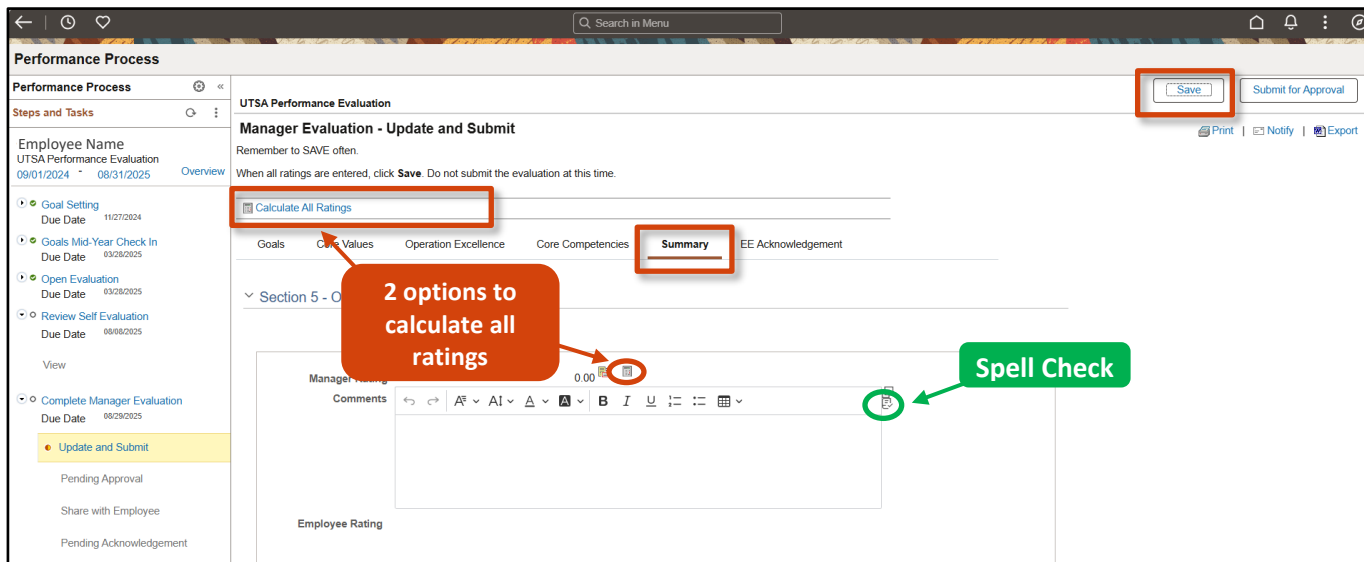
Employee Name: UTSA Performance Evaluation, 09/01/2024 - 08/31/2025, Overview

Steps and Tasks: Goal Setting (Due Date: 11/27/2024), Goals Mid-Year Check In (Due Date: 03/26/2025), Open Evaluation (Due Date: 03/26/2025), Review Self Evaluation (Due Date: 08/06/2025), View, Complete Manager Evaluation (Due Date: 08/29/2025), Update and Submit (Pending Approval, Share with Employee, Pending Acknowledgement)

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 15 – Summary

Select the **Summary** tab. Select **Calculate All Ratings** or the  icon to calculate the total overall **Employee Rating** then enter **Overall Summary** comments. **Save** to keep your changes.

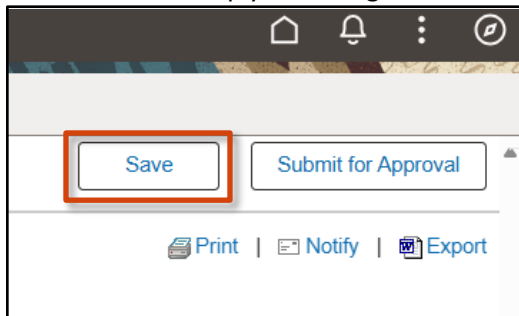


The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists various steps like 'Goal Setting', 'Goals Mid-Year Check In', 'Open Evaluation', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main area is titled 'Manager Evaluation - Update and Submit' and includes a 'Calculate All Ratings' button. A red box highlights this button, and a red callout bubble points to it with the text '2 options to calculate all ratings'. Another red box highlights the 'Summary' tab, and a green callout bubble points to a 'Spell Check' icon with the text 'Spell Check'. The 'Save' button is also highlighted with a red box.

NOTE: The system requires that managers rate each section. If you have not done this, you will receive an error message.

Step 10 of 15 – Save

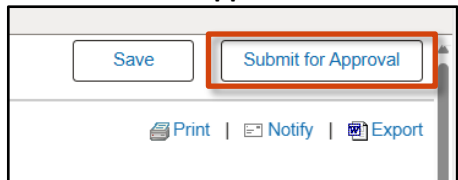
Select **Save** to keep your changes. This allows you to come back later to edit if you need more time to submit.



The screenshot shows a close-up of the 'Save' and 'Submit for Approval' buttons. The 'Save' button is highlighted with a red box.

Step 11 of 15 – Submit for Approval (After Calibration is Complete)

Your supervisor will notify you when to “Submit for Approval” once the calibration process has been completed. Click **Submit for Approval** and **Confirm** for next level manager approval.



The screenshot shows a close-up of the 'Save' and 'Submit for Approval' buttons. The 'Submit for Approval' button is highlighted with a red box.

Step 11 of 15 – (Continued)

Confirm.

Submit for Approval

You have chosen to submit this performance evaluation for approval. To confirm that you would like to submit the evaluation for approval, select the Submit button.

Do not submit this evaluation until you have completed each section. Once you select Submit, the evaluation will be routed through the approval process to the appropriate individuals. You will then be notified through email on the approval status.

PLEASE NOTE: If you hold multiple positions, choose the position that relates to the manager role used to evaluate the employee but this does not impact the approval workflow. The Next Level Supervisor is selected from your primary job.

The overall rating you have assigned to this employee is **3. Meets Expectations**.

If you did not enter comments for a rating of 1, 2, or 5, or forgot to rate an area, you will receive an error message. You will need to go back and enter any missing comments or ratings and then submit again.

Problem(s) completing your request:

- Please enter a rating for all items in the Goals section.
- Please enter a rating for all items in the Core Values section.
- Please enter a rating for all items in the Core Competencies section.

Manager Rating 3. Meets Expectations 2.67

Comments: test

NOTE: You can review the final rating here before submitting.

Step 12 of 15 – Meet with Employee

Schedule a time to meet with your employee to review the evaluation. This is not a step within the ePerformance system, but it is an important and required part of the performance management process.



Step 13 of 15 – Share with Employee

During or shortly after your meeting with the employee, go back into the system and click **Share with Employee**.

The screenshot shows the 'Performance Process' interface for a 'Manager Evaluation - Share with Employee'. The 'Steps and Tasks' list on the left includes: Goal Setting, Goals Mid-Year Check In, Open Evaluation, Review Self Evaluation, Complete Manager Evaluation (with sub-steps: Update and Submit, Pending Approval, Share with Employee, Pending Acknowledgement). The 'Share with Employee' button is highlighted in the top right corner of the main content area.

This screenshot shows the 'Share with Employee' dialog box with a 'Confirm' button highlighted. In the background, the 'Steps and Tasks' list on the left has 'Share with Employee' highlighted, and a red arrow points from the 'TIP' section below to this step.

TIP: You will see green checkmarks appear as you complete the steps of the performance evaluation process.

- Complete Manager Evaluation Due Date 08/29/2025
 - Update and Submit
 - Pending Approval
 - Share with Employee
 - Pending Acknowledgement

Step 14 of 15 – Review Final Comments

After the employee has Acknowledged their evaluation, you will receive an email notification with a link to the evaluation for review of their comments. The evaluation will no longer appear in **Current Documents** but is accessible in **Historical Documents**.

The screenshot shows the 'Team Performance' interface. On the left, a sidebar contains 'Current Documents', 'Historical Documents' (highlighted with a red box), 'View-Only Documents', and 'Approve Documents'. The main area is titled 'Historical Documents' and shows a table of documents. A red box highlights the following table:

Name / Job Title	Document Type	Document Status	Period Begin / Period End
Employee Name JOB TITLE	UTSA Performance Evaluation	Completed	09/01/2024 08/31/2025

Step 15 of 15 – Complete

After the document has been acknowledged by the employee, the evaluation is **Complete**. When the evaluation is complete you will see a green icon beside the Review Manager Evaluation section and the Instructions will say, “The document status is Completed. No further action is required.”

The screenshot shows the 'Performance Process' interface. On the left, a sidebar lists 'Steps and Tasks' including 'Goal Setting', 'Goals Mid-Year Check In', 'Open Evaluation', 'Review Self Evaluation', and 'Complete Manager Evaluation' (highlighted with a red box). The main area is titled 'UTSA Performance Evaluation' and shows 'Manager Evaluation - Completed'. A red box highlights the 'Instructions: Manager Evaluation' section, which states: 'The document status is Completed. No further action is required.' Below this, a red box highlights a 'Complete Manager Evaluation' button with a green checkmark icon and a 'Due Date' of '08/29/2025'. An arrow points from the 'Complete Manager Evaluation' button in the sidebar to the button in the main area.

FEATURE – Open Evaluation

If you haven't opened the employee's evaluation yet, follow the steps below to do so: Select **Open Evaluation**, then **Update and Complete**, then click the Open Evaluation button (top right). This will provide access for the employee to complete their self-evaluation.

Performance Process

Steps and Tasks

- Employee Name: UTSA Performance Evaluation 09/01/2024 - 08/31/2025
- Goal Setting Due Date: 11/15/2021
- Goals Mid-Year Check In - Skipped Due Date: 04/15/2022
- Open Evaluation Due Date: 07/01/2022**
- Review Self Evaluation Due Date: 08/15/2022
- Complete Manager Evaluation Due Date: 09/01/2022

UTSA Performance Evaluation

Finalize & Open Evaluation - Update and Complete

Employee Name: _____

Job Title: INSTRUCTIONAL DESIGNER Manager Name: _____

Document Type: UTSA Performance Evaluation Period: 09/01/2022 - 08/31/2023

Template: Individual Contributor: FY2023 Document ID: 34222

Status: Evaluation in Progress Due Date: 09/08/2023

Attention! Your comments are currently not shared with your employee and remain private.

Instructions: Finalize Goals, Open Evaluation

This is your final opportunity to adjust the goals recorded on your employee's evaluation. If no adjustments are needed, you will complete the checkpoints by opening the evaluation. This will make your employee's self-evaluation available as well as your manager's evaluation. If adjustments are needed, the new goal is added and you can either share with the employee for their review or complete the checkpoint for them to review as part of their evaluation.

Please note that you can reopen this step at any time up until the first save done on the evaluation. Once the evaluation is saved, the checkpoints cannot be reopened and the goals cannot be adjusted.

INSTRUCTIONS: Adding New Goals, Share with Employee

- To add additional goals to this performance cycle, select **Add Item** below. Select **Save** in the upper-right hand corner to leave the page and come back later. Once saved, the goal remains on the document whether you choose to share with your employee or open the evaluation.
- Your employee will be alerted that new goals and/or comments are ready to view by selecting **Share with Employee**, any new goals or comments on any goals are visible to you employee until checkpoint completed or you select to stop sharing with the employee. At this point, the employee can add their comments and see any newly added comments by you until you stop sharing the document with them or move forward past the checkpoint. To make the evaluation private again, select **Stop Sharing**.
- To move forward, select **Open Evaluation**.

INSTRUCTIONS: Adding New Goals, Open the Evaluation

- To add additional goals to this performance cycle, select **Add Item** below. Select **Save** in the upper-right hand corner to leave the page and come back later. Once saved, the goal remains on the document whether you choose to share with your employee or open the evaluation.
- To record the new goal(s) and any comments made and progress to the next step, select **Open Evaluation**.

FEATURE - Reopen the Self-Evaluation (If Applicable or Requested by Employee)

If the employee needs to update their self-evaluation, you can **Reopen** to send the evaluation back to the employee for updates.

In the evaluation task bar on the left side, click **Review Self Evaluation** and click **View**. Click **Reopen** just above the "Goals" tab and then **Confirm**.

Performance Process

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
- Review Self Evaluation Due Date: 08/08/2025**
- Complete Manager Evaluation Due Date: 08/29/2025

View

Instructions: Manager Evaluation

The document status is Completed. No further action is required.

If you have any questions contact People Excellence at HR@utsa.edu or call 210-458-4250.

Reopen

Goals Core Values Operation Excellence Core Competencies Summary

Section 1 - Goals

Provide the final status of the goal and any applicable comments.

Expand | **Collapse**

Employee-facing registry content

Reopen Evaluation

You have chosen to reopen this document. Select confirm to have the document status set back to Evaluation In Progress.

Employee-facing registry content

Saving Page ×

Confirmation - Reopen Evaluation

✔ You have successfully reopened this document and changed the status back to Evaluation In Progress.