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.

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.
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.

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.
Step 5 of 15 – Review Employee Attachments (Continued)

You will get this pop-up:

Attachment FINAL__Bold_New_Journey_4.6.2023.pdf successfully copied (4600,377)
File was successfully copied to the manager evaluation.
Refresh the manager evaluation to see the file.

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.

**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

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.
Step 7 of 15 – Evaluate Core Values (Continued)

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

**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.

![Image of the Summary tab with instructions](image)

**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.

![Image of the Save button](image)

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.

![Image of the Submit for Approval button](image)
Step 11 of 15 – (Continued)

Confirm.

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.

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.

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

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.”
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.

![Image of open evaluation process]

**NOTICE:** Your comments are currently not shared with your employee and remain private.

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.