

UTSA People Excellence

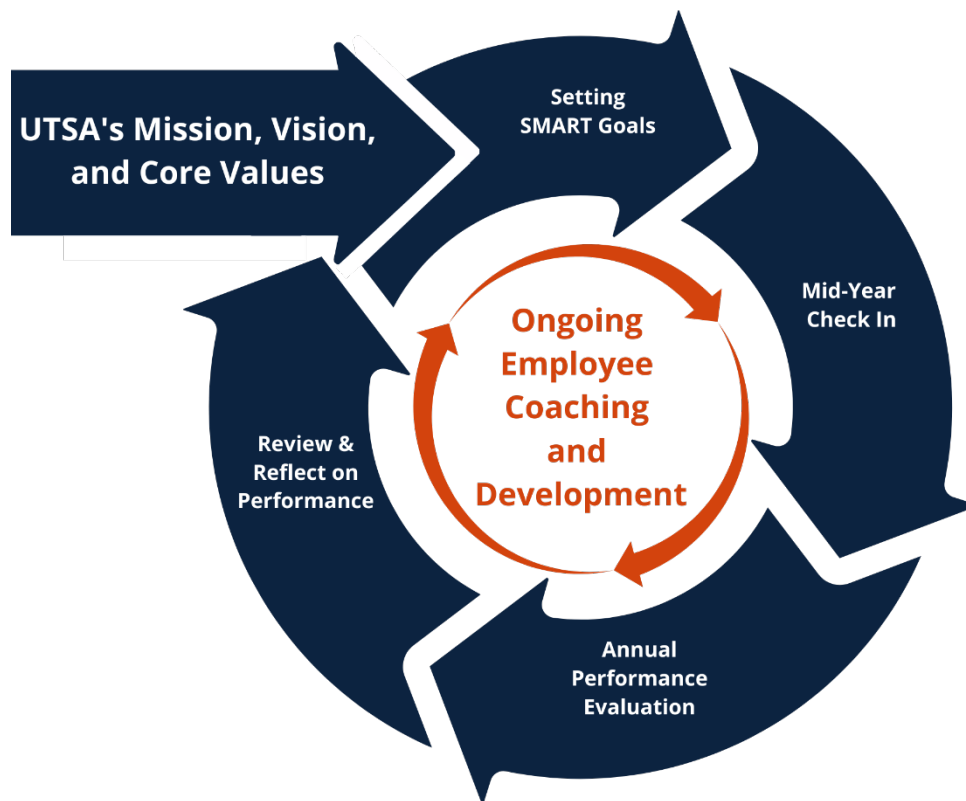
Manager Guide To Evaluating Employees

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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](#).



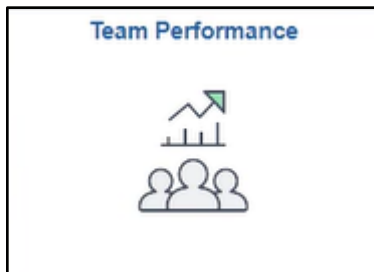
Step 1 of 15 – Manager Self-Service

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



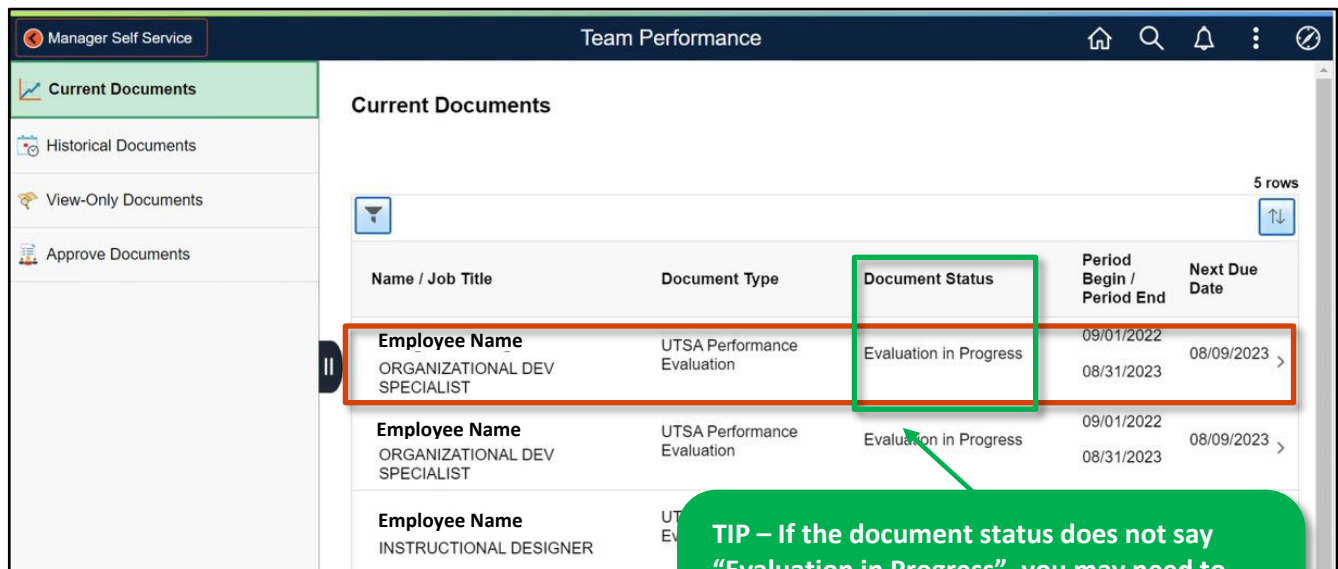
Step 2 of 15 – Performance Tile

Select the **Team Performance** tile.



Step 3 of 15 – Current Documents

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



A screenshot of the "Manager Self Service" interface. The left sidebar shows navigation options: "Current Documents" (highlighted), "Historical Documents", "View-Only Documents", and "Approve Documents". The main content area is titled "Current Documents" and displays a table with 5 rows. The table has columns for "Name / Job Title", "Document Type", "Document Status", "Period Begin / Period End", and "Next Due Date". The first two rows are highlighted with a red border, and the "Document Status" column for these rows is also highlighted with a green border. A green callout box with a white border and a green arrow pointing to the "Evaluation in Progress" status in the second row contains the following text:

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.)

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Employee Name ORGANIZATIONAL DEV SPECIALIST	UTSA Performance Evaluation	Evaluation in Progress	09/01/2022 08/31/2023	08/09/2023 >
Employee Name ORGANIZATIONAL DEV SPECIALIST	UTSA Performance Evaluation	Evaluation in Progress	09/01/2022 08/31/2023	08/09/2023 >
Employee Name INSTRUCTIONAL DESIGNER	UTSA Performance Evaluation			

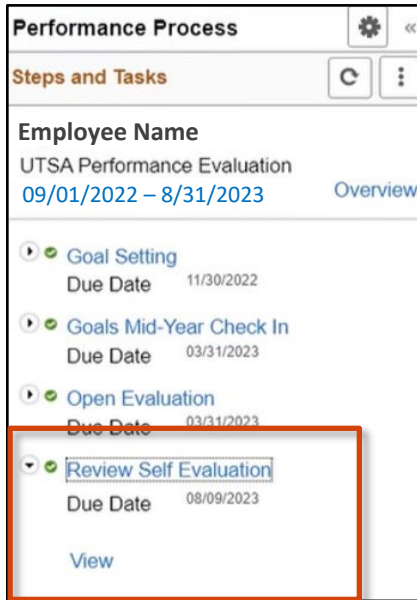
Step 4 of 15 – Verify

Verify the employee's name.

The screenshot displays the 'Performance Process' interface for a 'UTSA Performance Evaluation'. The main heading is 'Manager Evaluation - Update and Submit'. On the left, a 'Steps and Tasks' sidebar lists various stages: Goal Setting, Goals Mid-Year Check In, Open Evaluation, Review Self Evaluation, Complete Manager Evaluation, and Update and Submit (which is currently selected). The 'Employee Name' field is highlighted with a red box. Below this, the 'Employee Data' section shows details for the employee: Job Title (INSTRUCTIONAL DESIGNER), Document Type (UTSA Performance Evaluation), Template (Individual Contributor: FY2023), Status (Evaluation in Progress), Department (BHR001), and HUMAN RESOURCE SERVICES. The 'Instructions: Manager Evaluation' section provides guidance on entering ratings and comments, and includes a 'Calculate All Ratings' button. At the bottom, there are tabs for 'Goals', 'Core Values', 'Operation Excellence', 'Core Competencies', 'Summary', and 'EE Acknowledgement'. The 'Section 1 - Goals' tab is currently active.

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**.

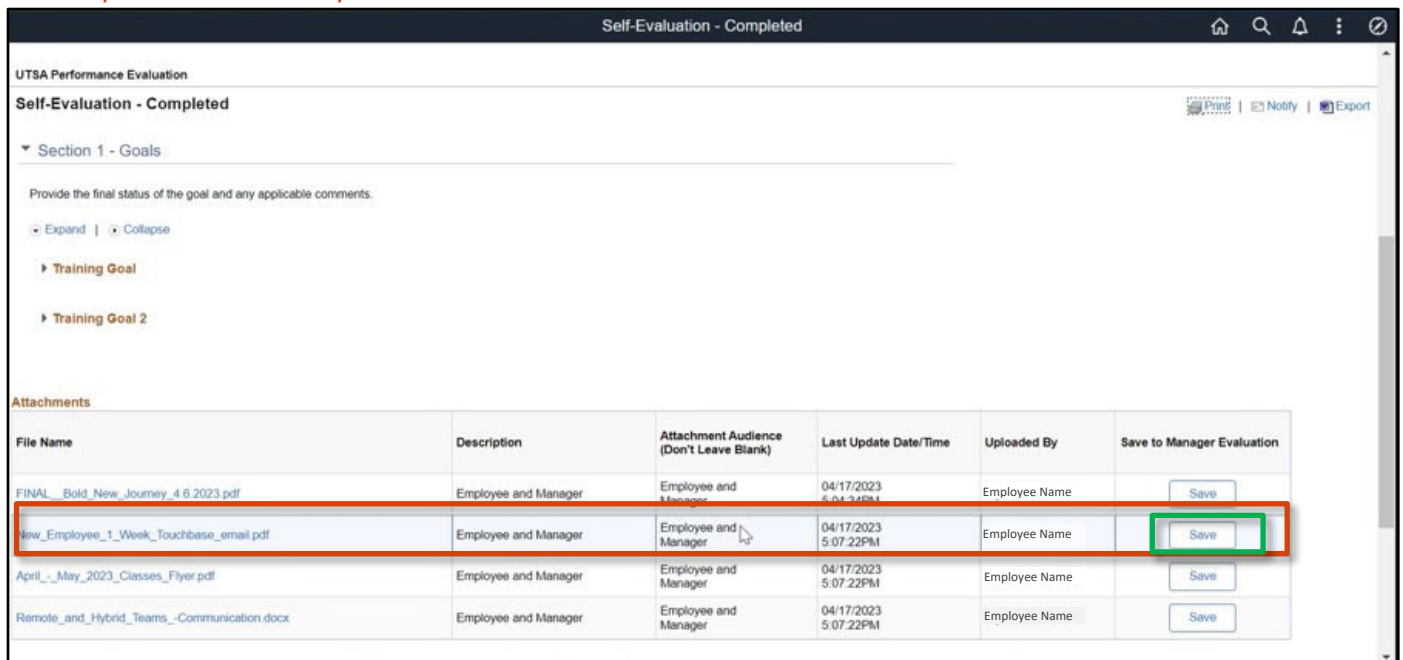


Scroll down to find the **Attachments** section. All attachments will be located in the same section, regardless of what tab they were originally added.

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

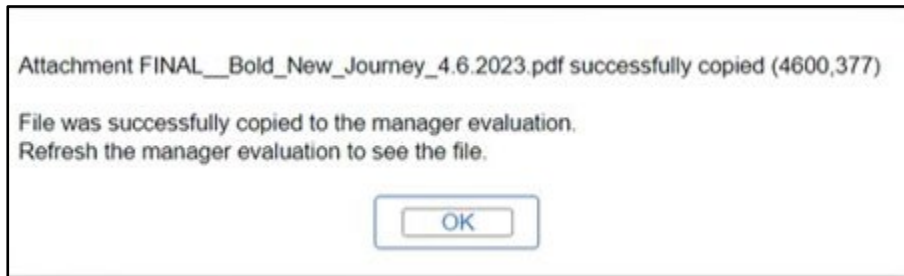
Click **Save** to attach to the Manager Evaluation.

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.

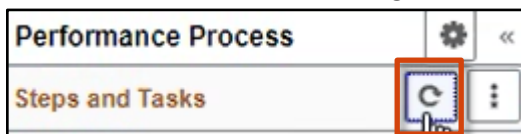


Step 5 of 15 – Review Employee Attachments (Continued)

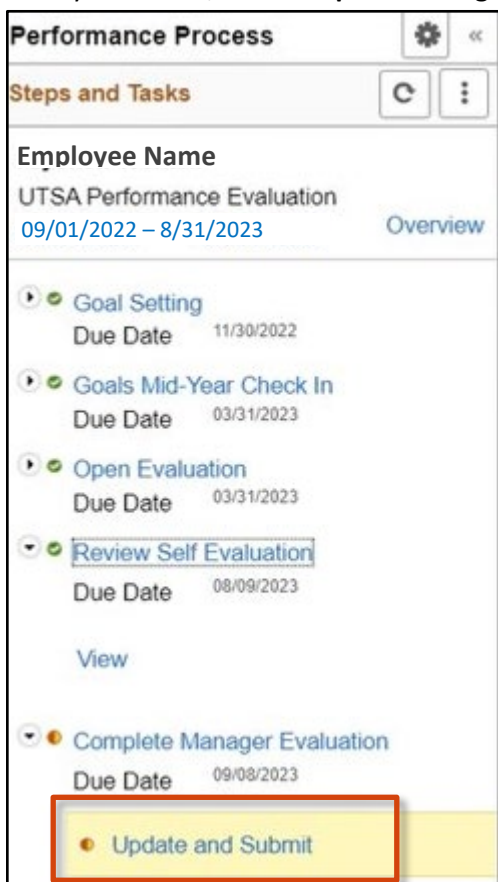
You will get this pop-up:



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**.



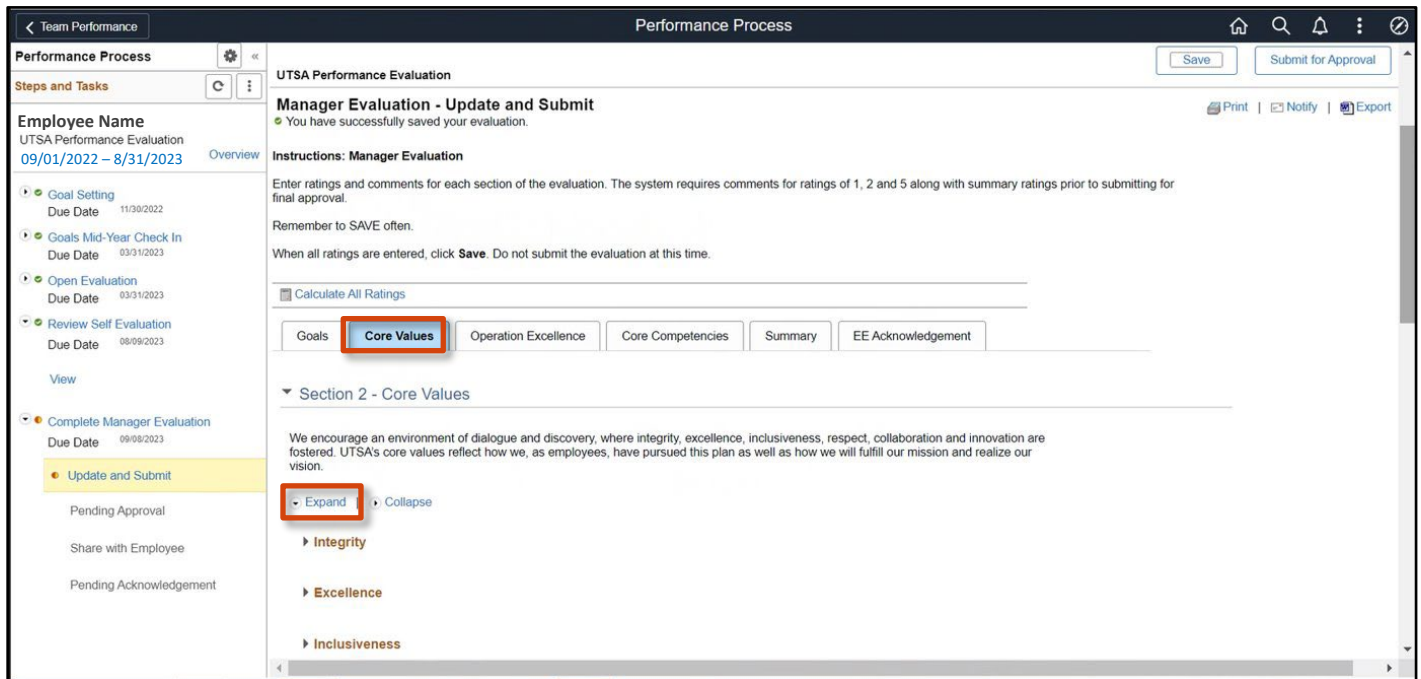
Step 6 of 15 – Evaluate Goals

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 'UTSA Performance Evaluation' interface. The 'Goals' tab is selected, and the 'Manager Evaluation - Update and Submit' section is active. A 'Training Goal' is shown with a description: 'I will develop 5 trainings modules that align to the needs of leaders by August 2023'. The 'Manager Rating' dropdown is set to 'Goal Achieved'. The 'Manager Comments' text area contains 'Goal Achieved' and 'Goal Not Achieved'. A green callout box with a white border points to the spell check icon in the text editor toolbar, containing the text: '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.

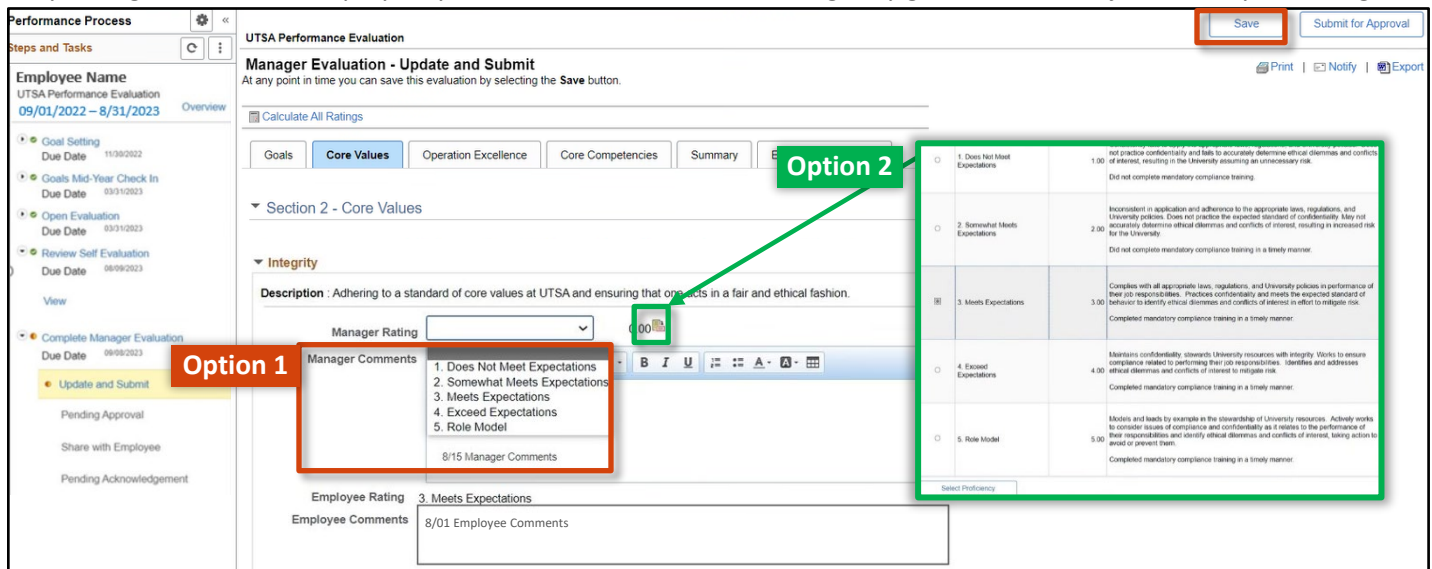
Option 1: Select a rating from the drop down box in **Manager Rating**.

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.



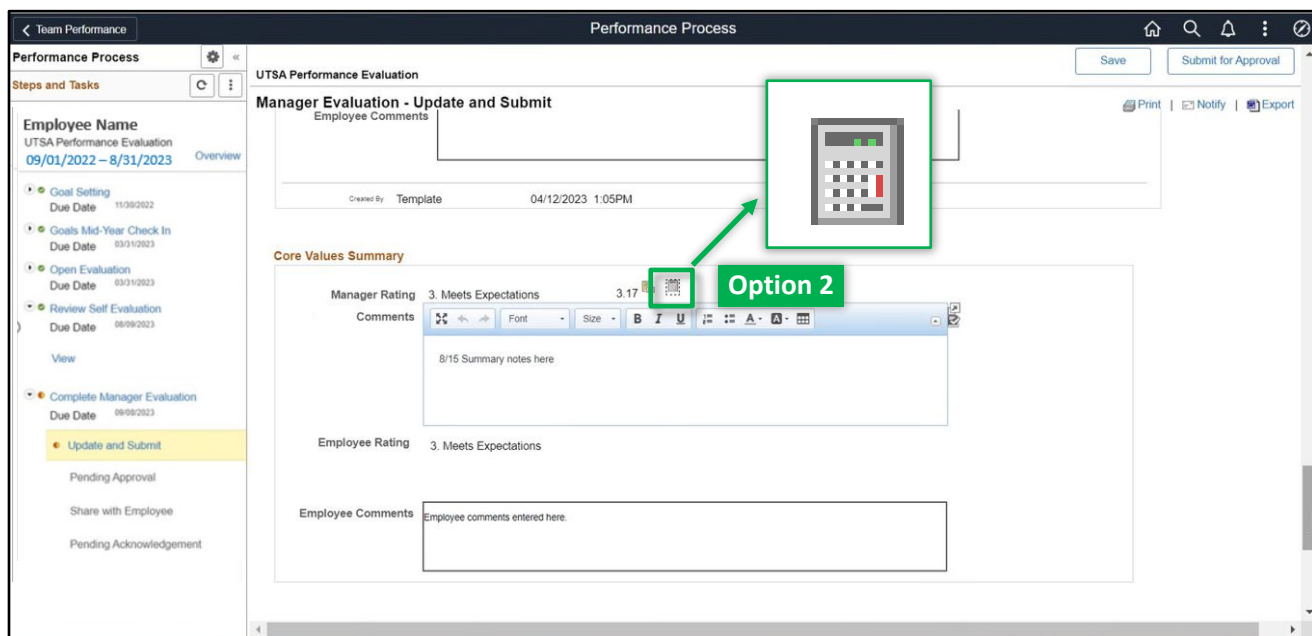
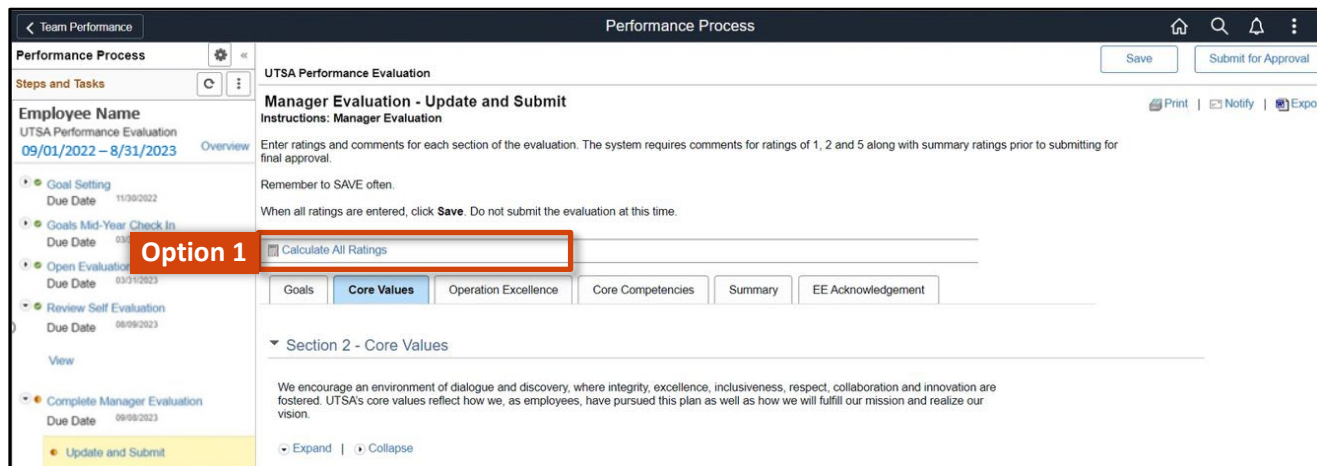
Step 7 of 15 – Evaluate Core Values (Continued)

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

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 8 of 15 – Evaluate Operation Excellence & Core Competencies


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

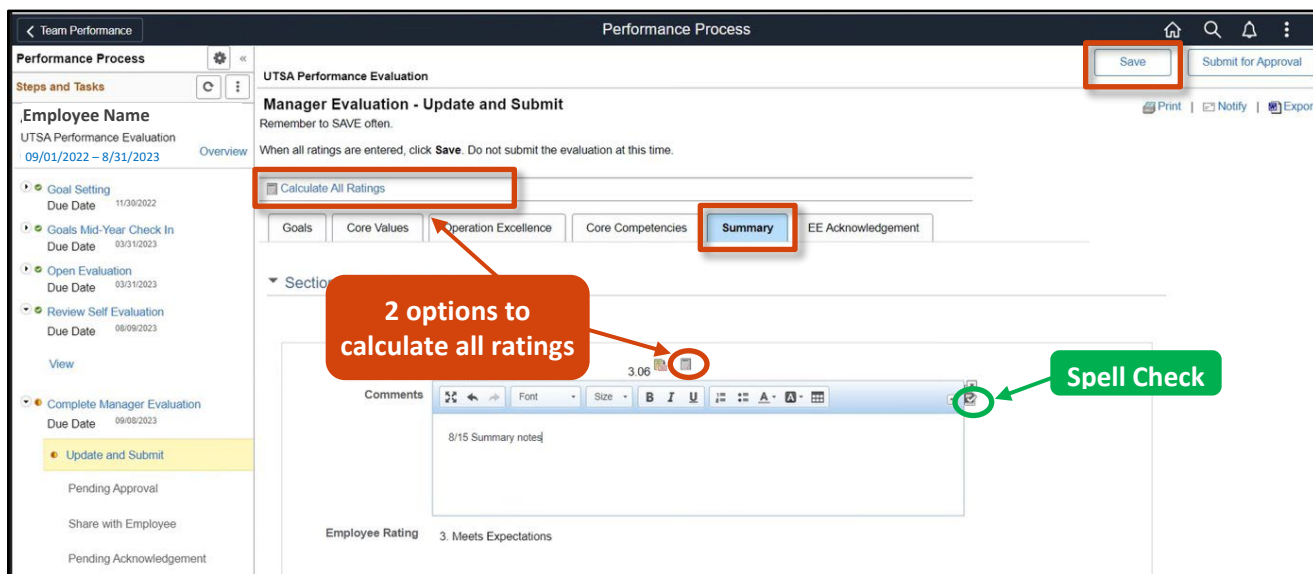
Note: People Leaders and Executives have different tabs and competencies however the same steps apply.

The screenshot displays the 'UTSA Performance Evaluation' interface. The main heading is 'Manager Evaluation - Update and Submit'. A 'Save' button is highlighted in the top right corner. The 'Operation Excellence' tab is selected. A dropdown menu for 'Manager Rating' is open, showing options: 1. Does Not Meet Expectations, 2. Somewhat Meets Expectations, 3. Meets Expectations, 4. Exceed Expectations, 5. Role Model. A 'Calculate All Ratings' button is highlighted in green. A 'Spell Check' button is also highlighted in green. The interface includes a sidebar with navigation options, a main content area with a description of 'Operational Excellence', and a text area for 'Manager Comments'.

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

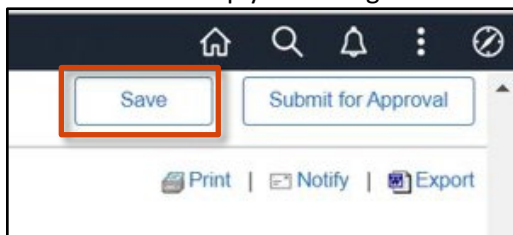
Select the **Summary** tab. Select **Calculate All Ratings** or the  icon to calculate the total overall **Employee Rating** then enter **Overall Summary** comments. **Save** to keep your changes.



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

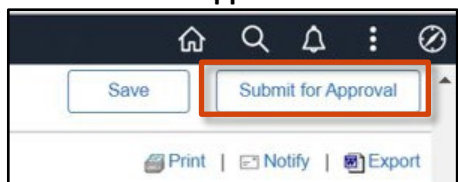
Step 10 of 15 – Save

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



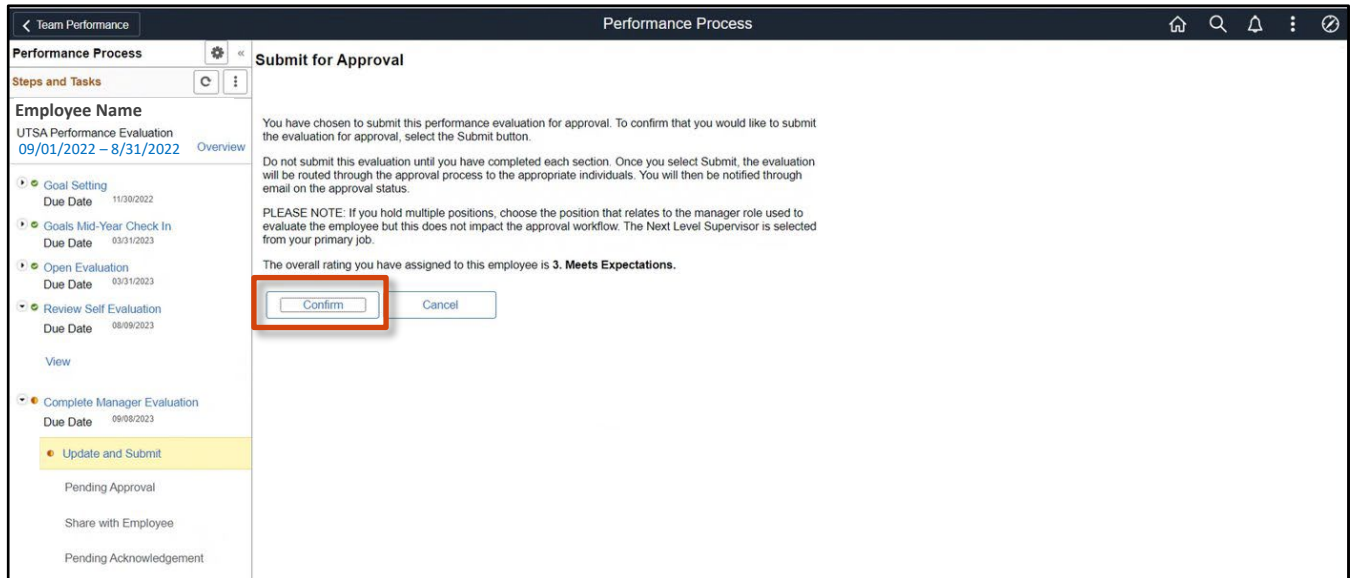
Step 11 of 15 – Submit for Approval (After Calibration is Complete)

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.

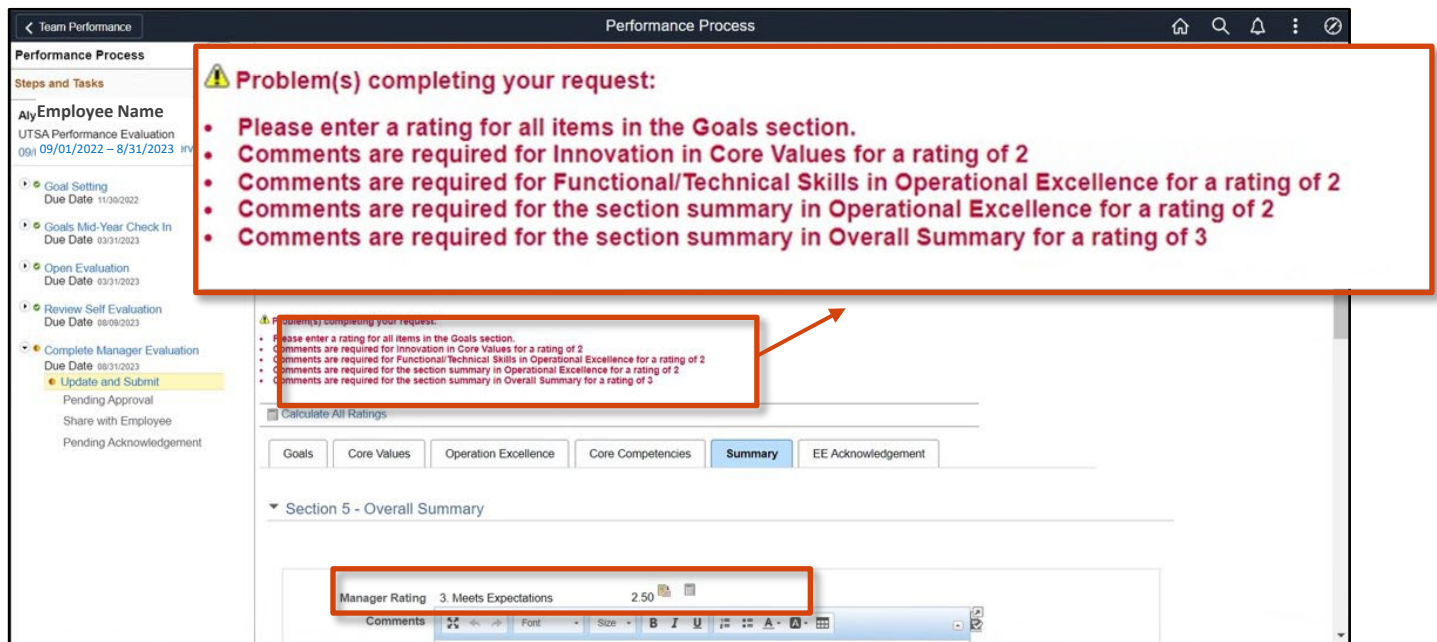


Step 11 of 15 – (Continued)

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.

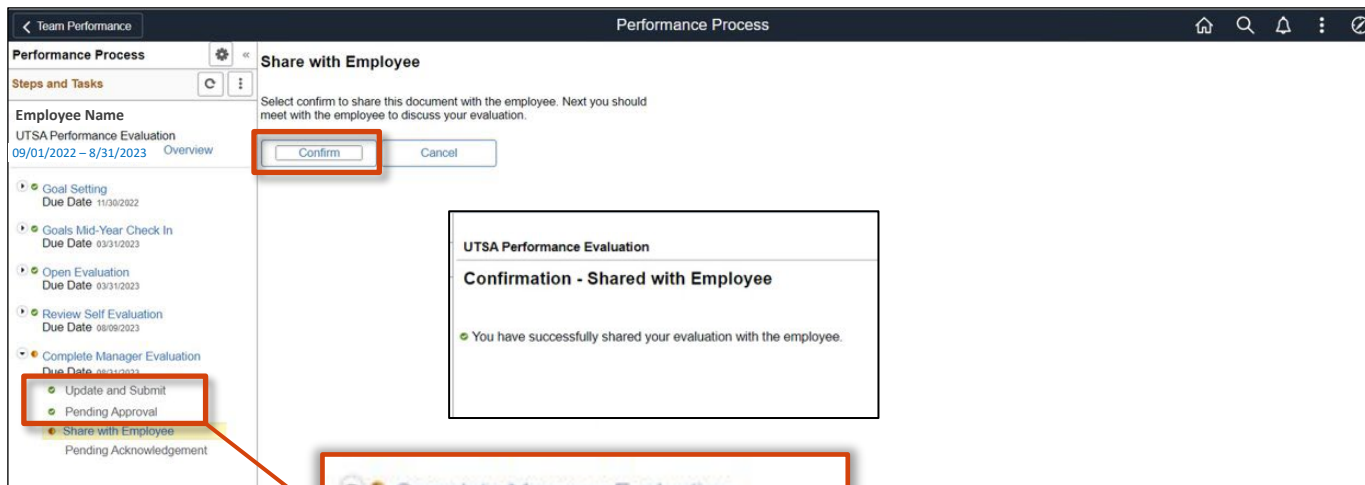
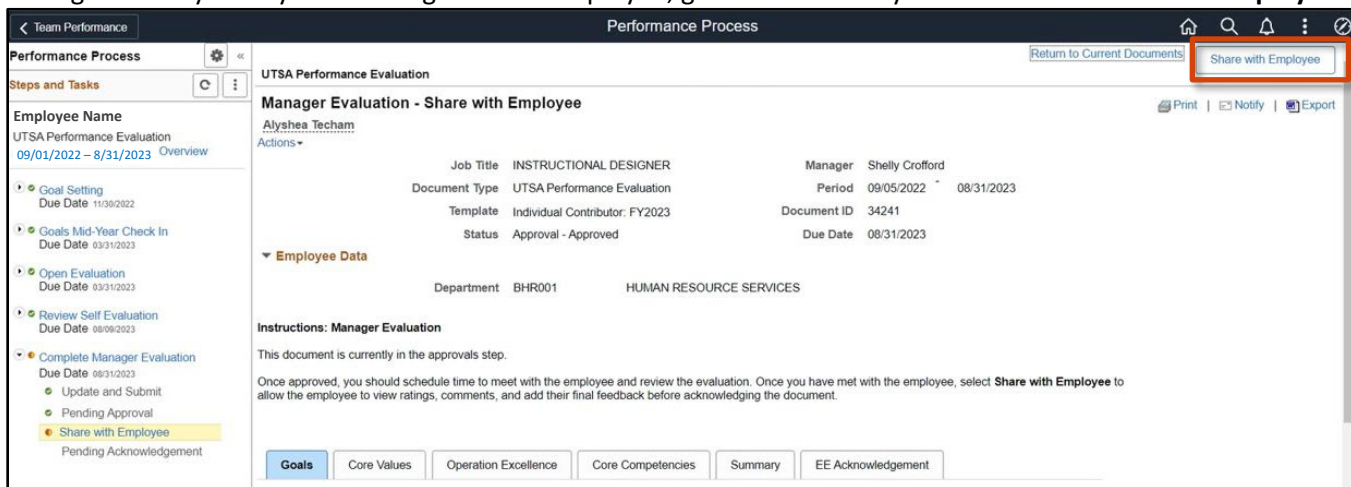
Step 12 of 15 – Meet with Employee

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.

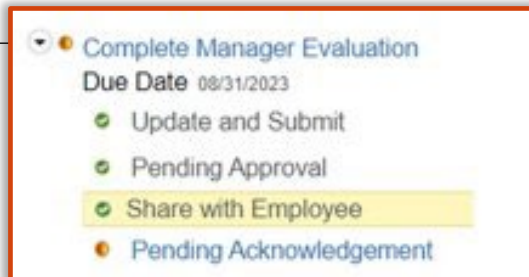


Step 13 of 15 – Share with Employee

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

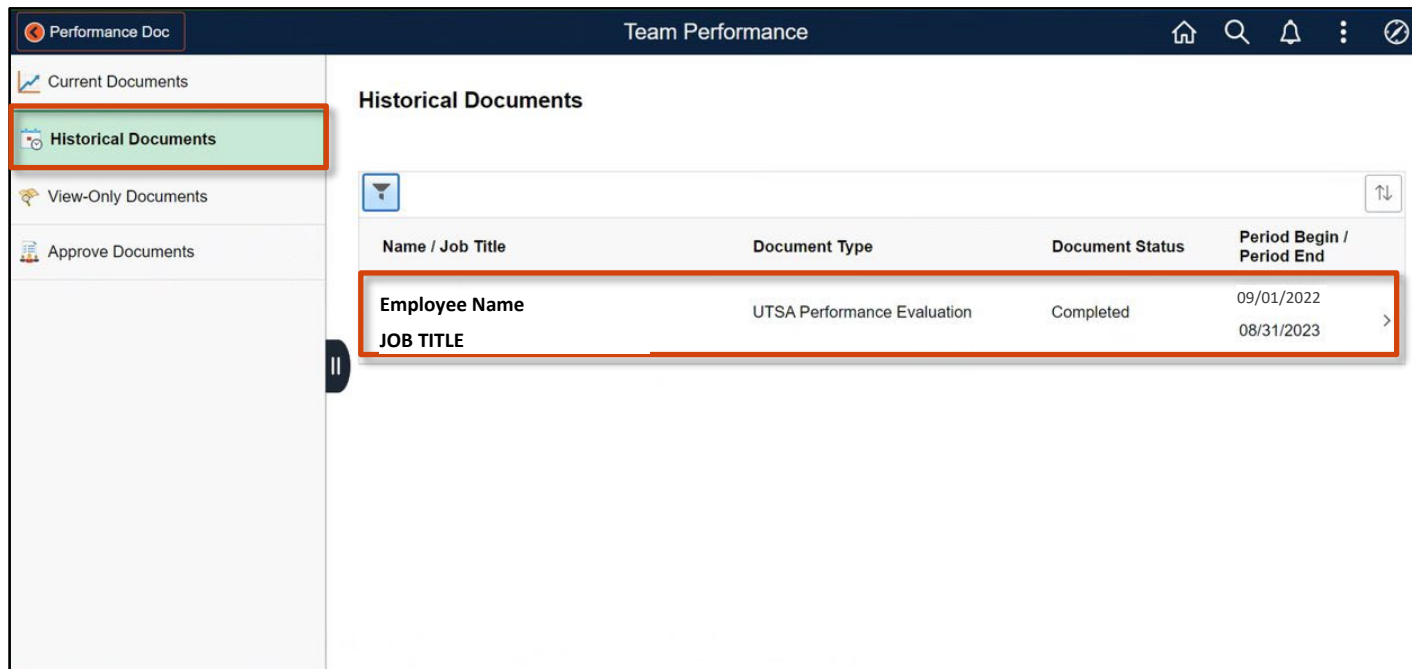


TIP: You will see green checkmarks appear as you complete the steps of the performance evaluation process.



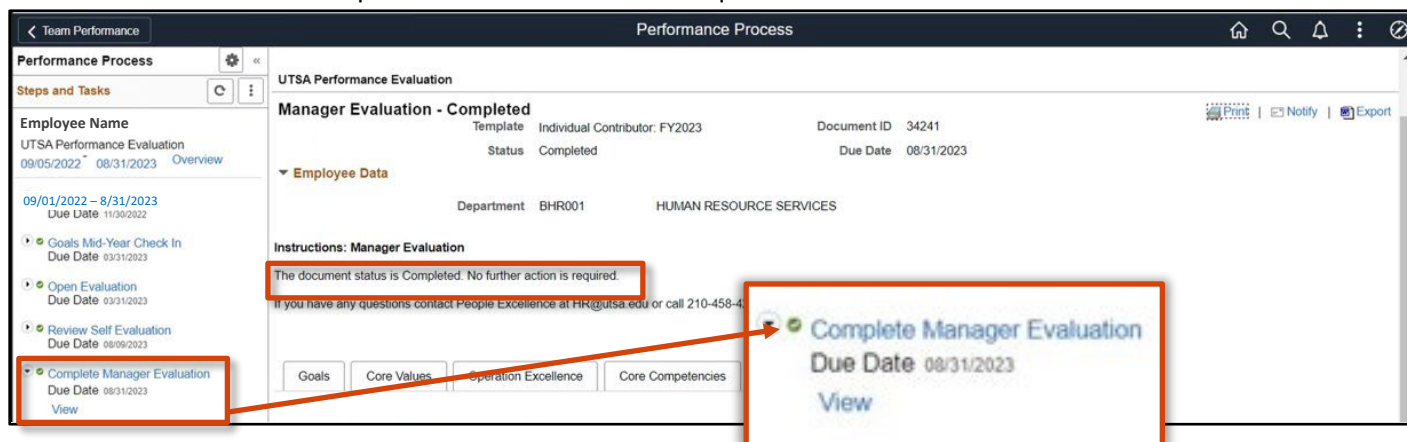
Step 14 of 15 – Review Final Comments

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.

Performance Process | UTSA Performance Evaluation | Save | Share with Employee | **Open Evaluation**

Steps and Tasks

Employee Name
UTSA Performance Evaluation
09/01/2022 – 08/31/2023

Finalize & Open Evaluation - Update and Complete

Employee Name: [Redacted] | Job Title: INSTRUCTIONAL DESIGNER | Manager: [Redacted] | Manager Name: [Redacted]

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.

Performance Process

Steps and Tasks

Employee Name
UTSA Performance Evaluation
09/01/2022 – 8/31/2023

- Goal Setting (Due Date: 11/30/2022)
- Goals Mid-Year Check In (Due Date: 03/31/2023)
- Open Evaluation (Due Date: 03/31/2023)
- Review Self Evaluation** (Due Date: 08/09/2023)
- Complete Manager Evaluation (Due Date: 09/08/2023)

View

Update and Submit

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