

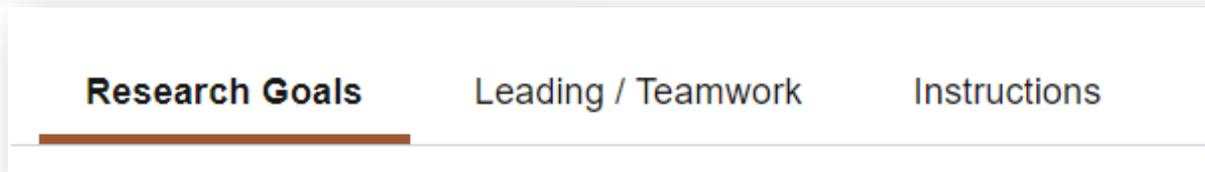
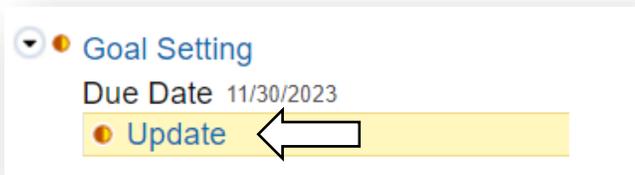
Leading/Teamwork Tab – Criteria Entry

The Leading/Teamwork tab was designed to customize criteria for the various stages of the postdoctoral experience. **Stage 1 criteria** is recommended for all postdoctoral fellows. Employees and managers should discuss and add items aligned to **Stage 2** and **Stage 3** each year to enhance the postdoctoral training experience at UTSA. These items can be accessed following the steps below.

How do I now which stage I am in?

- Stage 1: Postdoctoral Fellows in years 1-2
- Stage 2: Postdoctoral Fellows in years 3-4
- Stage 3: Postdoctoral Fellows in years 4+

Step 1: Once you navigate to the evaluation within PeopleSoft, click **Update** under the **Goal Setting** task on the left-side task bar. **Note:** You will now see **3 tabs** upon viewing the evaluation.

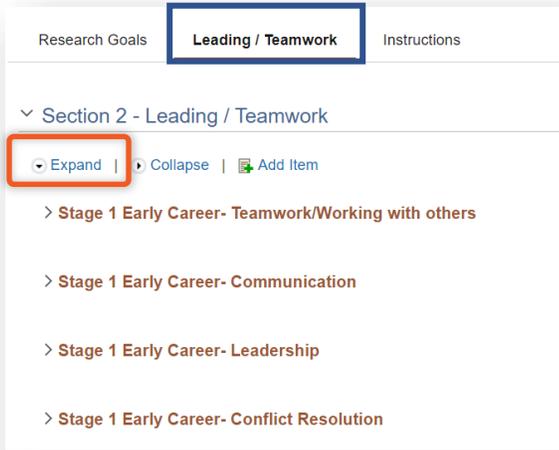


Tabs:

- **Research Goals:** Use this tab to enter 3-5 SMART goals for the performance year.
- **Leading/Teamwork:** This tab will be used to customize criteria based on the postdoctoral career stage. (Directions below)
- **Instructions:** This tab includes instructions on how to enter criteria in the Leading/Teamwork tab.

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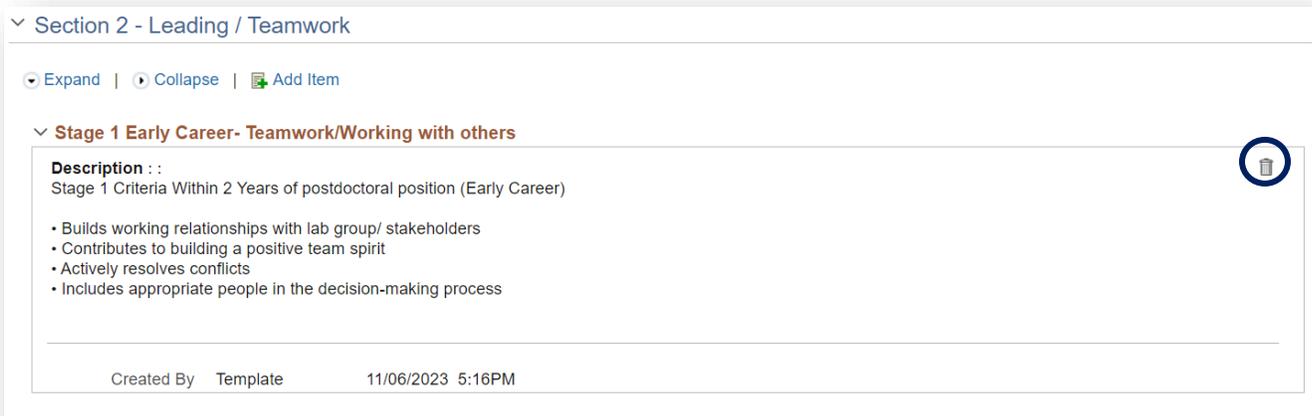
Step 2: Click the **Leading/Teamwork** tab. This tab is prepopulated with Stage 1 criteria that is recommended for all postdoctoral fellows. Click **Expand** to view each descriptor.



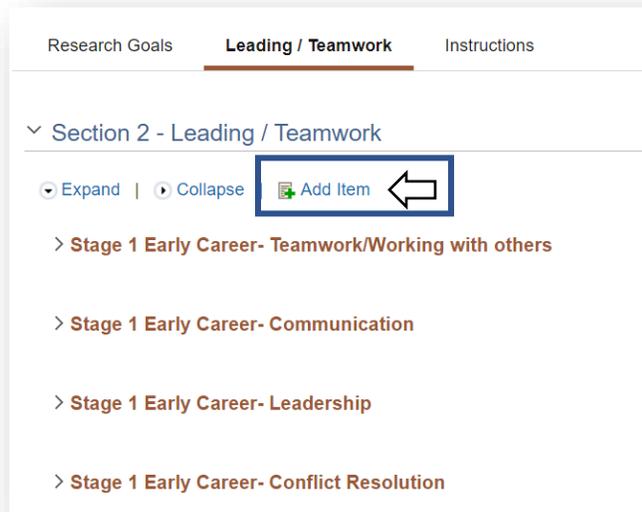
Note:

- Selecting **Expand** will allow you to view all descriptions for each criteria
- Selecting **Collapse** will hide the descriptions for each criteria
- Select the arrow next to each item to expand/collapse the description individually

Expanded View: If you need to delete criteria, click the trash can icon while in the expanded view.



Step 4: Click **Add Item** to view additional criteria for Stage 2 and Stage 3. **Note:** If you do not need additional criteria, continue to Step 6.



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Step 4: The search bar allows you to search all criteria when left blank or you can type Stage 2 or Stage 3 to populate the correlating items.

UTSA Performance Evaluation
Add a Pre-Defined Item
To search for items to add to the document select the search button. You can also enter search criteria to help refine your results.

Search Criteria  Title

[Return](#)

UTSA Performance Evaluation
Add a Pre-Defined Item
To search for items to add to the document select the search button. You can also enter search criteria to help refine your results.

Search Criteria
Title 

Search Results 1-3 of 3

Leading / Teamwork	
<input type="checkbox"/>	Stage 2 - Mentoring
<input type="checkbox"/>	Stage 2 - Directing Others
<input type="checkbox"/>	Stage 2 - Delegation

[Return](#)

Step 5: Select the criteria you wish to include or use the **Select All** button to select all of the criteria. Once you have selected criteria, click **Add** to add the items to the evaluation and return to the **Leading/Teamwork** tab. Be sure to click **SAVE** once you return to the tab.

Leading / Teamwork	
<input checked="" type="checkbox"/>	Stage 2 - Mentoring
<input checked="" type="checkbox"/>	Stage 2 - Directing Others
<input checked="" type="checkbox"/>	Stage 2 - Delegation
<input checked="" type="checkbox"/>	Stage 3 - Employee Performance
<input checked="" type="checkbox"/>	Stage 3 - Fostering Professional Growth of Others
<input checked="" type="checkbox"/>	Stage 3 - Employee Recognition



[Return](#)

The **Leading/Teamwork** tab, should be updated with the selected criteria. Click **Expand** to view each descriptor. If an item was added by mistake or does not apply, click the trash can icon while in the expanded view to delete it.

NOTE: Items you are not planning to complete at this stage should be deleted prior to the Mid-Year Check In.

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▼ **Stage 1 - Teamwork/Working with others**

Description :

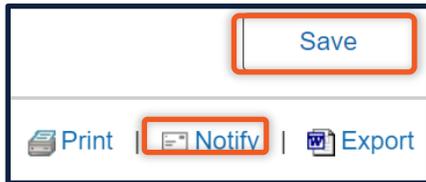
- Builds working relationships with lab group/ stakeholders
- Contributes to building a positive team spirit
- Actively resolves conflicts
- Includes appropriate people in the decision-making process



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Step 6: Once all **Research Goals** and **Leading/Teamwork criteria** are entered, click **Save** and then **Notify** to send a system email letting your manager know they are ready for review.

Leading/Teamwork criteria and Research Goals should be entered by November 30.



Note:

- **Print** allows you to create a PDF of your evaluation
- **Export** allows you to create an editable Word document of your evaluation

Frequently Asked Questions

- Can I select criteria from stages 2 and 3 if I am a stage 1 postdoc? *Yes, if those area apply to the work you are doing.*
- Do I have to select all criteria if I am in Stage 3? *Criteria should align to your roles and responsibilities.*
- Can I add or delete criteria after the evaluation is open? *All criteria should be finalized by the mid-year check in.*