

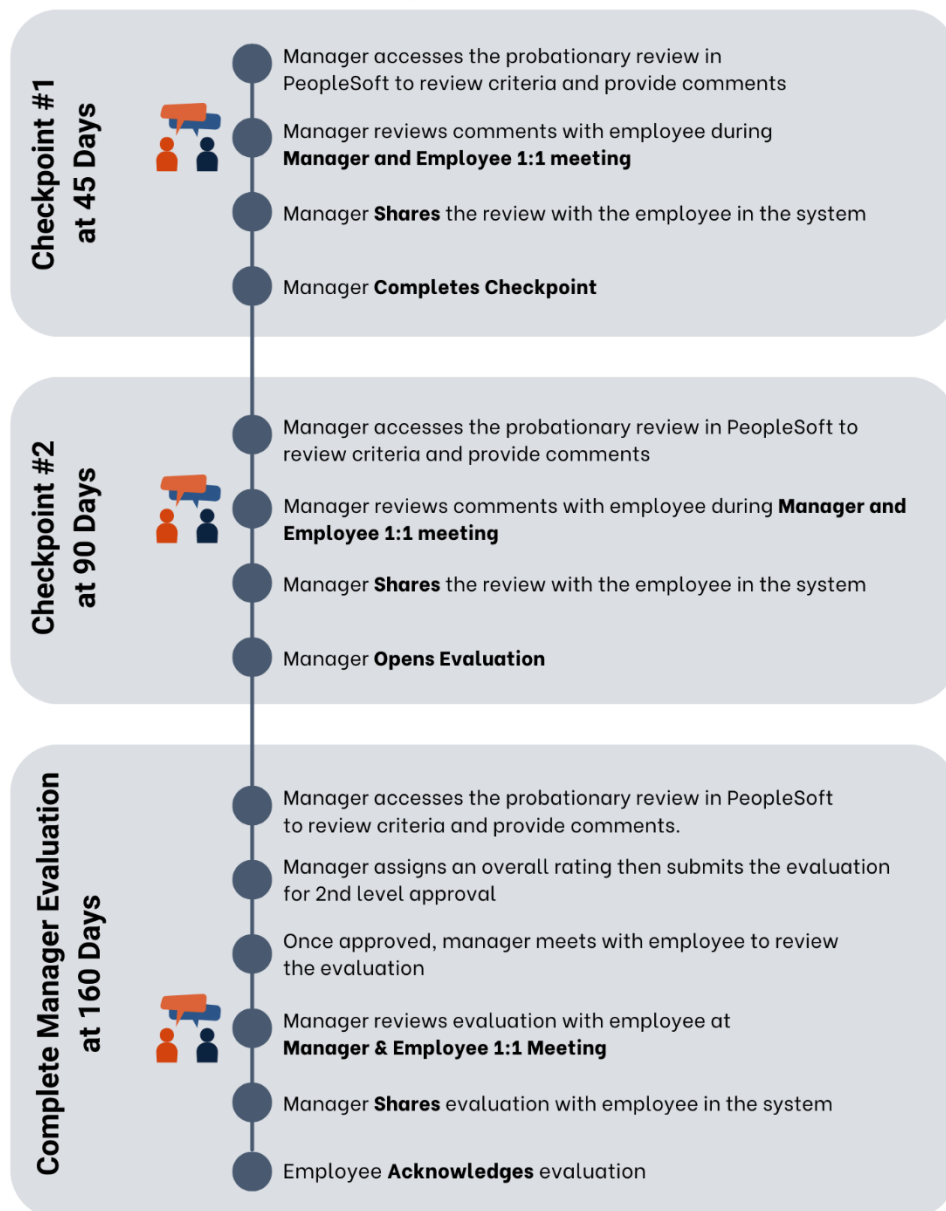
**UTSA** People Excellence

# Probationary Review Guide

## Probationary Review

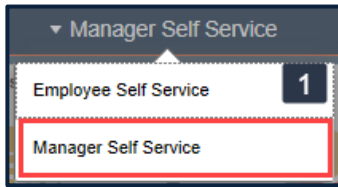
New, classified, benefits-eligible employees are considered probationary for the first 6 months of employment at UTSA. Each probationary employee is assigned a UTSA Probationary Review that includes 45-, 90-, and 160-day Checkpoints. Managers can access their employees' probationary documents through the Team Performance tile in PeopleSoft. The Probationary Review utilizes checkpoints that allow managers to provide ongoing feedback that will ensure the employee has the tools and resources necessary to be successful.

### Probationary Review Process



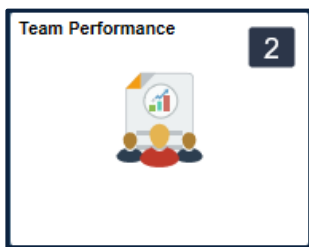
## Step 1– Manager Self Service

Select the **Manager Self Service** option from the dropdown from the PeopleSoft homepage.



## Step 2– Performance Tile

Select the **Team Performance** tile.



## Step 3 – Current Documents

A list of available **Current Documents** will appear for any team member assigned a Probationary Review or Annual Evaluation.

The document type **UTSA Probationary Review** will differentiate it from any current Annual Evaluations. The **Document Status** provides the checkpoint status and will update as the steps progress.

Select an employee to continue.

A screenshot of the 'Team Performance' interface showing a table of 'Current Documents'. The table has five columns: 'Name / Job Title', 'Document Type', 'Document Status', 'Period Begin / Period End', and 'Next Due Date'. One row is highlighted with a red border. The table also includes a search bar and a '4 rows' indicator.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Employee Name INSTRUCTIONAL DESIGNER		Track Progress - Checkpoint #1- 45 Day	02/01/2024 08/01/2024	03/19/2024
Employee Name INSTRUCTIONAL DESIGNER	UTSA Performance Evaluation	Define Criteria	09/01/2023 08/30/2024	11/30/2023
Employee Name ORGANIZATIONAL DEV SPECIALIST	UTSA Performance Evaluation	Define Criteria	09/01/2023 08/30/2024	11/30/2023
Employee Name Change Management Advisor	UTSA Performance Evaluation	Track Progress - Goals Mid-Year Check In	09/01/2023 08/30/2024	03/29/2024

**Note:** For system questions including assignment, transferring or cancelling documents, contact [training@utsa.edu](mailto:training@utsa.edu)

## Step 4 – Review and Verify Information

The document pane includes employee information, helpful instructions and performance criteria to be reviewed. Be sure to review the information prior to entering comments on performance.

The Steps and Tasks list located on the left, includes important due dates and will be used to navigate each step of the process.

The screenshot shows the 'Performance Process' interface. On the left, a 'Steps and Tasks' sidebar lists: 'Checkpoint #1- 45 Day' (Due Date: 03/19/2024), 'Update and Share' (highlighted), 'Checkpoint #2- 90 Day & Open Eval' (Due Date: 05/03/2024), and 'Complete Manager Evaluation' (Due Date: 07/12/2024). The main content area is titled 'Checkpoint #1- 45 Day - Update and Share'. It displays employee information for 'UTSA Probationary Review' (Job Title: INSTRUCTIONAL DESIGNER, Manager: Manager Name, Period: 02/01/2024 - 08/01/2024, Document ID: 44342, Status: In Progress, Due Date: 03/19/2024). Below this, there are instructions: 'Attention! Your comments are currently not shared with your employee and remain private.', 'Checkpoint #1 at 45 Days.', 'To begin the checkpoint:', a numbered list of steps (1. Click **Expand** to open each item... 2. Schedule time with the employee...), 'Once you have met with the employee:', another numbered list (1. Click **Share with Employee**... 2. Click **Complete Checkpoint**...), and a note: '\* NOTE \* Clicking Next Checkpoint will skip this checkpoint and mark it incomplete'. At the bottom, there is a contact link for HR Business Partner at [HRBP@utsa.edu](mailto:HRBP@utsa.edu) and a section header 'Section 1 - Probationary Performance Criteria' with 'Expand' and 'Collapse' buttons.

## Step 5 – Begin Checkpoint #1 - 45 Day

Click **Expand** in the document under Section 1 – Probationary Performance Criteria to expand each criteria to be reviewed. Review each item and provide comments related to the employee’s performance. Be sure to **Save** often

This block contains two screenshots. The left screenshot shows the 'Section 1 - Probationary Performance Criteria' with the 'Expand' button highlighted in a red box. Below it are expandable sections: 'Overall Work Performance', 'UTSA Core Values', 'Employee Strengths', and 'Areas of Opportunity'. The right screenshot shows the 'Expanded View' of the 'Overall Work Performance' section. It includes a 'Description' field with text: 'How does the employee perform the duties of their job? This could include their performance based on the core competencies as well as the foundations of overall job performance to include communication, work completion, teamwork and following policy and procedures.' Below the description is a 'Manager Comments' text area with a rich text editor toolbar. At the bottom, it shows 'Created By: Template' and a timestamp '02/08/2024 10:37AM'. A green arrow points from the text 'Expanded View' to the right screenshot.

## Step 6 – Meet with Employee for 45-day checkpoint

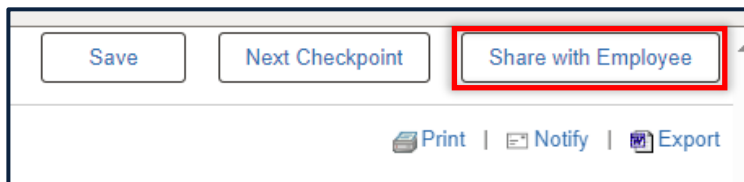
Schedule time with the employee to review comments and discuss performance. Allow time to discuss next steps and provide feedback that supports employee growth.



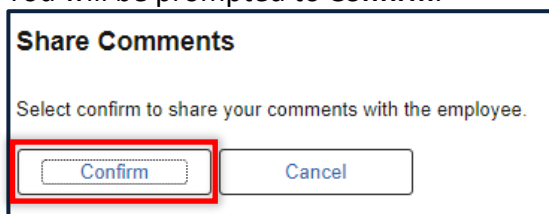
## Step 7 – Share with Employee

Once the checkpoint meeting is complete, be sure to **Save** any changes and select **Share with Employee**.

**NOTE:** Please **avoid** selecting Next Checkpoint as it will **skip** this checkpoint and mark it as incomplete.



You will be prompted to **Confirm**.



## Step 8 – Complete Checkpoint

Click **Complete Checkpoint** to complete the 45- day checkpoint and move the evaluation to the 90- day milestone.

**NOTE:** Selecting **Next Checkpoint** will skip to the next checkpoint and mark it as incomplete.

The screenshot shows the 'Performance Process' interface for a '\*UTSA Probationary Review\*'. On the left, the 'Steps and Tasks' list includes 'Checkpoint #1- 45 Day' (due 03/19/2024) and 'Checkpoint #2- 90 Day & Open Eval' (due 05/03/2024). The 'Update and Share' option for the 45-day checkpoint is highlighted. On the right, a confirmation dialog box titled 'Complete Checkpoint' is displayed, containing the text: 'Select confirm to indicate a review was held with the employee and this checkpoint is complete.' Below the text are two buttons: 'Confirm' (highlighted with a red box) and 'Cancel'. Above the dialog, a toolbar shows buttons for 'Save', 'Next Checkpoint', 'Stop Sharing', and 'Complete Checkpoint' (highlighted with a red box).

## Step 9 – Begin Checkpoint #2 - 90 Day & Open Eval

In the Steps and Tasks lists on the left, click **Update and Complete** under Checkpoint #2 – 90 Day & Open Eval. Click **Expand** in the document under Section 1 – Probationary Performance Criteria to expand each criteria to be reviewed. Review each item and provide comments related to the employee’s performance. Be sure to **Save** often.

The screenshot shows the 'Performance Process' interface with 'Checkpoint #2- 90 Day & Open Eval' (due 05/03/2024) selected. The 'Update and Complete' button is highlighted with a red box. The main content area displays 'Checkpoint #2 at 90 Days' with instructions on how to begin the checkpoint and what to do after meeting with the employee. Below the instructions, 'Section 1 - Probationary Performance Criteria' is expanded, showing a list of criteria: 'Overall Work Performance', 'UTSA Core Values', 'Employee Strengths', and 'Areas of Opportunity'. Each item has a right-pointing chevron icon.

## Step 10 – Meet with Employee for 90-day checkpoint

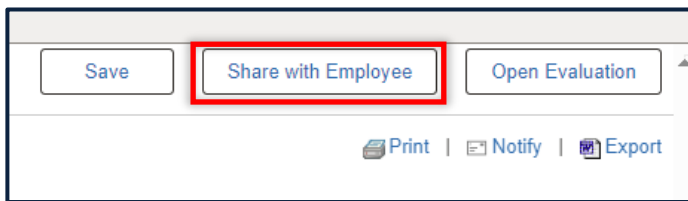
Schedule time with the employee to review comments and discuss performance. Allow time to discuss next steps and provide feedback that supports employee growth.



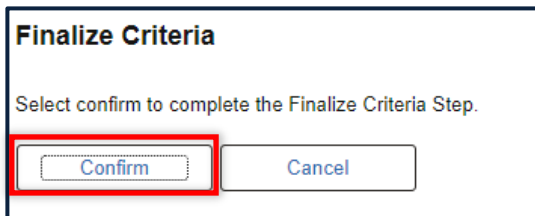
## Step 11 – Share with Employee and Open Evaluation

Once the checkpoint meeting is complete, be sure to **Save** any changes and select **Share with Employee**.

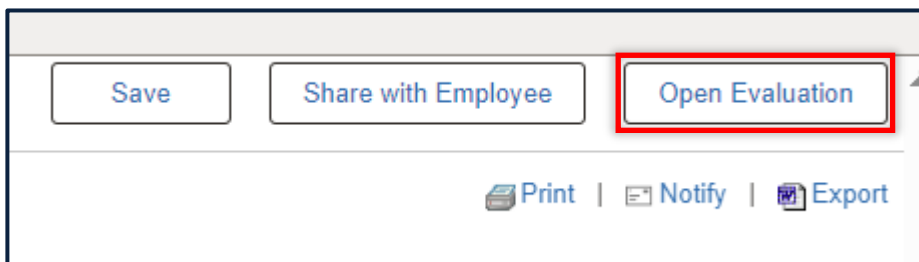
**NOTE:** Please **avoid** selecting Next Checkpoint as it will **skip** this checkpoint and mark it as incomplete.



You will be prompted to **Confirm**.



Click **Open Evaluation** to complete the checkpoint and move the evaluation to the next checkpoint to be conducted at the 160- day milestone.



## Step 12 – Complete Manager Evaluation (160 Day)

Click **Update and Submit** under Complete Manager Evaluation on the left. You will notice the document now includes three tabs, Performance, Overall Rating and EE Acknowledgement.

**Performance Process**

Performance Process [Save] [Submit for Approval]

Steps and Tasks [Overview]

"UTSA Probationary Review" 02/01/2024 - 08/01/2024

**Manager Evaluation - Update and Submit**

Job Title INSTRUCTIONAL DESIGNER Manager Shelly Crofford  
 Document Type "UTSA Probationary Review" Period 02/01/2024 - 08/01/2024  
 Template "UTSA Probationary Review" Document ID 44342  
 Status Evaluation In Progress Due Date 07/12/2024

**Checkpoint #3 at 160 Days - Evaluation**

**To begin the checkpoint:**

1. Click **Expand** to open each item. Review each performance criteria and provide comments related to the employee's performance in each area. Be sure to **Save** often.
2. Once you have entered comments, navigate to the **Overall Summary** tab. Provide an overall **Manager Rating** and add comments about the employee's overall performance.
3. When complete, click **Submit for Approval** in the upper right-hand corner to move the evaluation to your supervisor's queue for approval. Complete the steps below **AFTER** the evaluation has been approved by the 2nd level supervisor.

**After the evaluation has been approved by the 2nd level supervisor:**

1. Once approved, meet with your employee to review the evaluation.
2. After the employee review meeting, click **Share with Employee** in the upper right-hand corner to share the evaluation with the employee for final comments and acknowledgement.

Contact Talent Management at [training@utsa.edu](mailto:training@utsa.edu) directly with system questions or your HRBP at [HRBP@utsa.edu](mailto:HRBP@utsa.edu) for questions about the process questions.

Calculate All Ratings

Performance Overall Summary EE Acknowledgement

Section 1 - Probationary Performance Criteria

## Step 13 – Provide Comments

Click **Expand** and add comments for each Probationary Performance Criteria. Remember to **Save** often.

Calculate All Ratings

Performance Overall Summary EE Acknowledgement

Section 1 - Probationary Performance Criteria

Please select an overall summary rating and provide final comments about employee job performance. Include strengths and areas of opportunity as well as any next steps that support employee growth.

Expand | Collapse

**Overall Work Performance**

**Description :** How does the employee perform the duties of their job? This could include their performance based on the core competencies as well as the foundations of overall job performance to include communication, work completion, teamwork and following policy and procedures.

Manager Comments

Created By Template 02/08/2024 10:37AM

> UTSA Core Values

> Employee Strengths

> Areas of Opportunity



## Step 14 – Assign Overall Rating

Click the **Overall Summary** tab. Provide an overall summary of employee performance including any next steps for growth and success. Use the rating drop down to assign one overall summary rating.

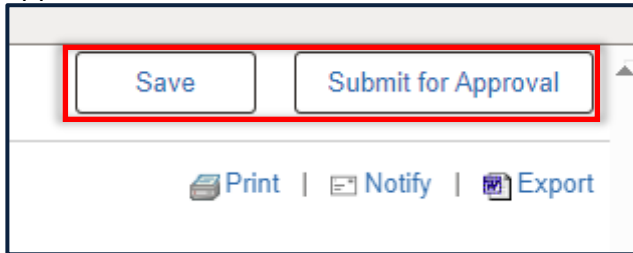
The screenshot shows the 'Overall Summary' tab selected in a performance review interface. At the top, there are three tabs: 'Performance', 'Overall Summary' (highlighted with a red box), and 'EE Acknowledgement'. Below the tabs is a section titled 'Section 2 - Probationary Summary'. A text prompt reads: 'Please include comments about the employee's overall performance including strengths, opportunities and next steps that support employee success.' Underneath is a 'Probationary Summary Summary' section containing a 'Manager Rating' dropdown menu and a 'Comments' text area with a rich text editor toolbar. A clipboard icon is visible next to the Manager Rating dropdown.

**Note:** The probationary evaluation includes 4 possible ratings. Click the clipboard to review summary rating descriptors to ensure alignment to overall performance.

This screenshot is similar to the previous one but shows the 'Manager Rating' dropdown menu open. The dropdown list contains four options: '1. Does Not Meet Expectations', '2. Somewhat Meets Expectations', '3. Meets Expectations', and '4. Exceeds Expectations'. A red box highlights the dropdown list. A green callout bubble with a clipboard icon and the text 'Click to review rating descriptors' points to the clipboard icon next to the dropdown. The 'Overall Summary' tab remains selected.

## Step 15 – Save and Submit for Approval

Click **Save and Submit for Approval** to send the evaluation to the 2<sup>nd</sup> level approver for review and final approval.



## Step 16 – Review and Share with Employee

Schedule time to meet with the employee to review performance feedback and overall rating.



Click **Share with Employee** and **Confirm** to share the evaluation with your employee.

A composite screenshot showing the 'Share with Employee' workflow. The top left shows a 'Share with Employee' button highlighted with a red border. The top right is a dialog box titled 'Share with Employee' with the text: 'Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.' Below this text are 'Confirm' and 'Cancel' buttons, with 'Confirm' highlighted by a red border. The bottom part of the image shows a 'Performance Process' sidebar for 'Alyshea Techam' with a task list. The 'Share with Employee' task is highlighted in yellow. The main content area shows a green confirmation message: 'Confirmation - Shared with Employee' and 'You have successfully shared your evaluation with the employee.'

## Step 17 – Employee Acknowledgement – To be completed by the employee

Next, the employee will review the evaluation and add final comments. Once complete, the employee should **Save** any edits prior to clicking the **Acknowledge** button in the upper right-hand corner.

The screenshot shows a web application interface with three tabs: Performance, Overall Summary, and EE Acknowledgement. The EE Acknowledgement tab is active. Below the tabs is a section titled 'Section 3 - Employee Acknowledgement'. A message states: 'This document is currently waiting for your acknowledgement. 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.' Below this is a red-bordered box titled 'Employee Acknowledgement Summary'. Inside this box, there is a label 'Employee Comments' followed by a large empty text input field with a small icon in the top right corner.

## Step 18 – Review Employee Comments

Once the employee acknowledges the evaluation, review any final comments added. This can be accessed through the system email or by clicking Historical Documents under the Team Performance tile in PeopleSoft.

The screenshot shows a vertical menu with four options, each with an icon and text: 'Current Documents' (bar chart icon), 'Historical Documents' (calendar icon with a checkmark, highlighted with an orange background), 'View-Only Documents' (umbrella icon), and 'Approve Documents' (document icon with a checkmark).

Reach out to your [HR Business Partner](#) if you need support with the probationary review process.  
Contact [training@utsa.edu](mailto:training@utsa.edu) for system support.