



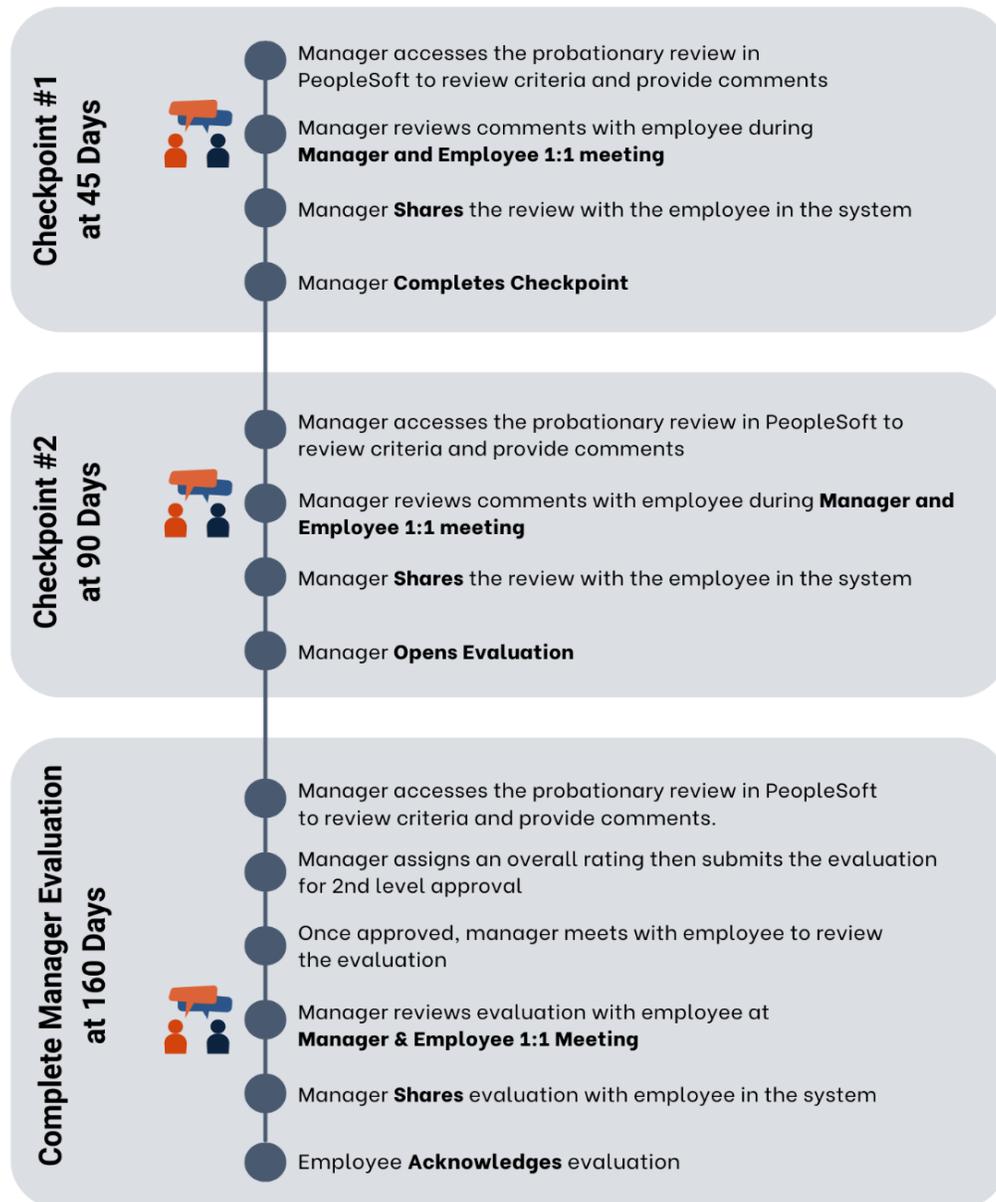
UT San Antonio[™]
The University of Texas at San Antonio

Probationary Review Guide

Probationary Review

New, classified, benefits-eligible employees are considered probationary for the first 6 months of employment at UT San Antonio. Each probationary employee is assigned a UT San Antonio 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.

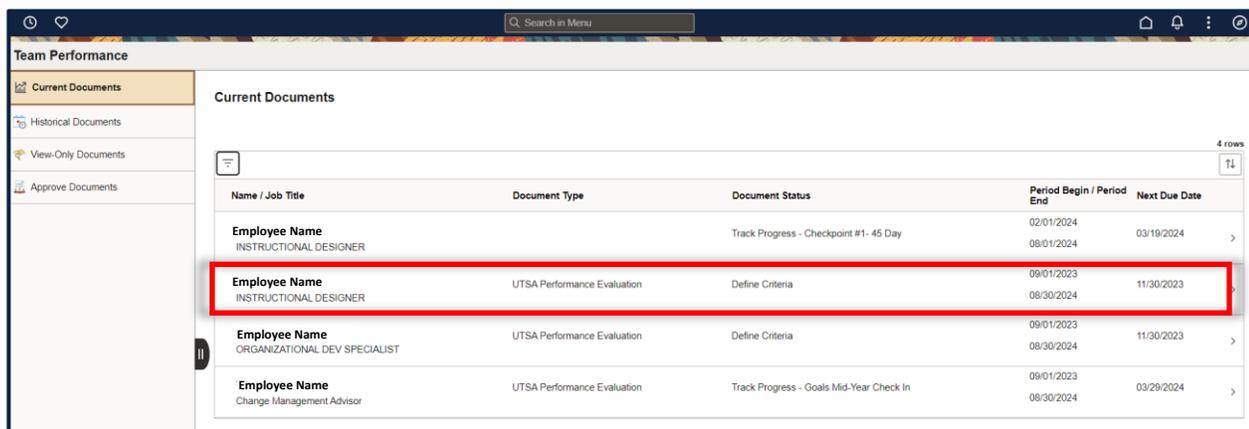


Step 3 – Current Documents

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

The document type **UT San Antonio 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.



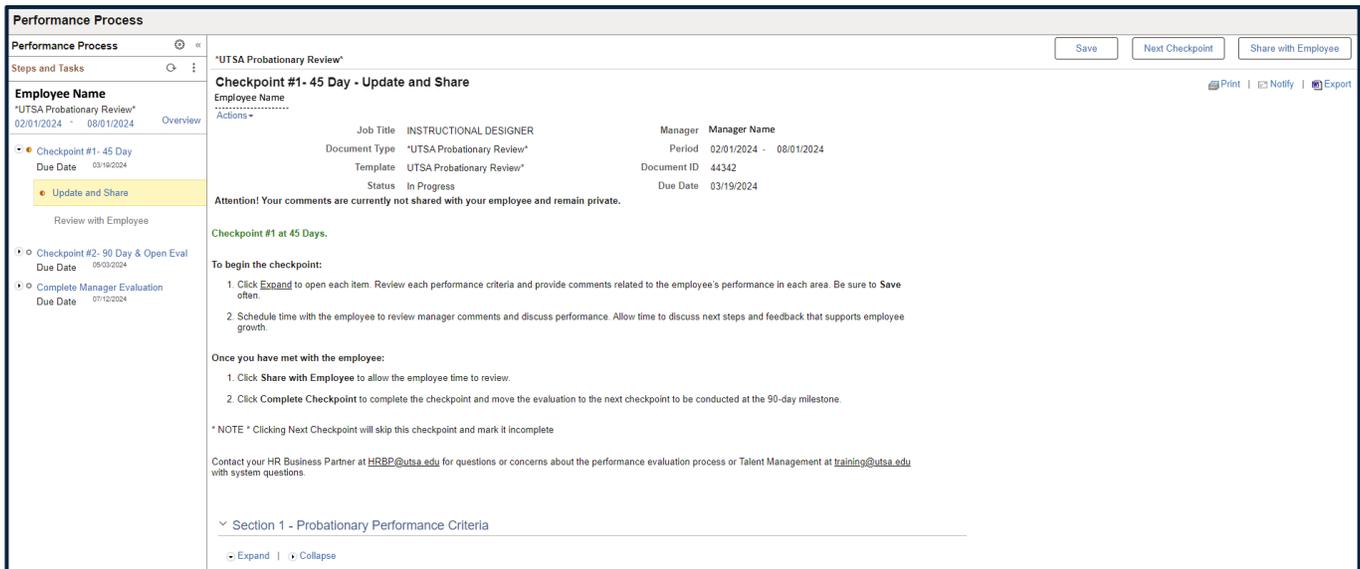
Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Employee Name INSTRUCTIONAL DESIGNER		Track Progress - Checkpoint #1- 45 Day	02/01/2024 08/01/2024	03/19/2024
Employee Name INSTRUCTIONAL DESIGNER	UTSA Performance Evaluation	Define Criteria	09/01/2023 08/30/2024	11/30/2023
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

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.



Performance Process

Performance Process [Close] [Save] [Next Checkpoint] [Share with Employee]

Steps and Tasks [Close] [Filter]

Employee Name
"UTSA Probationary Review"
02/01/2024 - 08/01/2024 [Overview]

Checkpoint #1 - 45 Day - Update and Share [Print] [Notify] [Export]

Employee Name
Job Title: INSTRUCTIONAL DESIGNNER
Manager: Manager Name
Document Type: "UTSA Probationary Review"
Period: 02/01/2024 - 08/01/2024
Template: UTSA Probationary Review
Document ID: 44342
Status: In Progress
Due Date: 03/19/2024

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

Checkpoint #1 at 45 Days.

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

Once you have met with the employee:

1. Click **Share with Employee** to allow the employee time to review.
2. Click **Complete Checkpoint** to complete the checkpoint and move the evaluation to the next checkpoint to be conducted at the 90-day milestone.

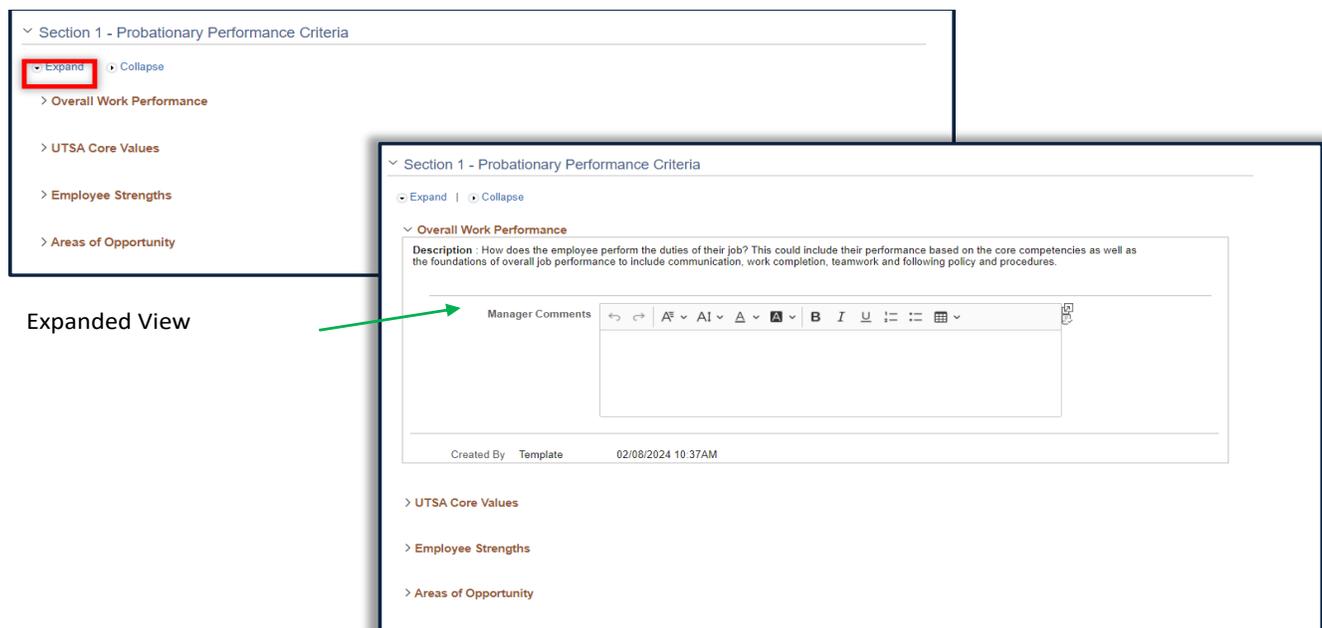
* NOTE * Clicking Next Checkpoint will skip this checkpoint and mark it incomplete

Contact your HR Business Partner at HRBP@utsa.edu for questions or concerns about the performance evaluation process or Talent Management at training@utsa.edu with system questions.

Section 1 - Probationary Performance Criteria [Expand] [Collapse]

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



Section 1 - Probationary Performance Criteria [Expand] [Collapse]

Expanded View [Expand] [Collapse]

- > Overall Work Performance
- > UTSA Core Values
- > Employee Strengths
- > Areas of Opportunity

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 [Rich Text Editor]

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- > UTSA Core Values
- > Employee Strengths
- > Areas of Opportunity

Step 6 – Meet with Employee for 45-day checkpoint

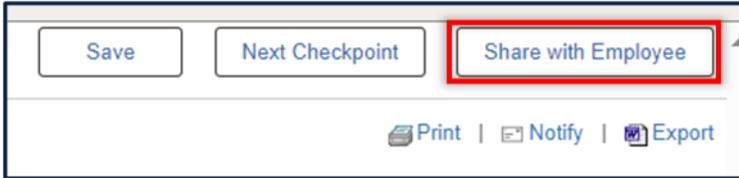
Schedule time with the employee to review comments and discuss performance. Allow time to discuss next steps and provide feedback that supports employee growth.



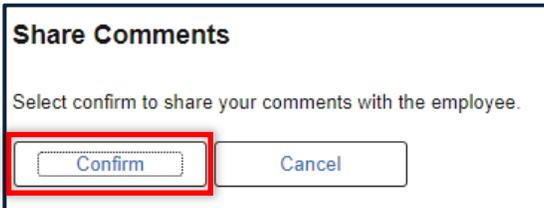
Step 7 – Share with Employee

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.



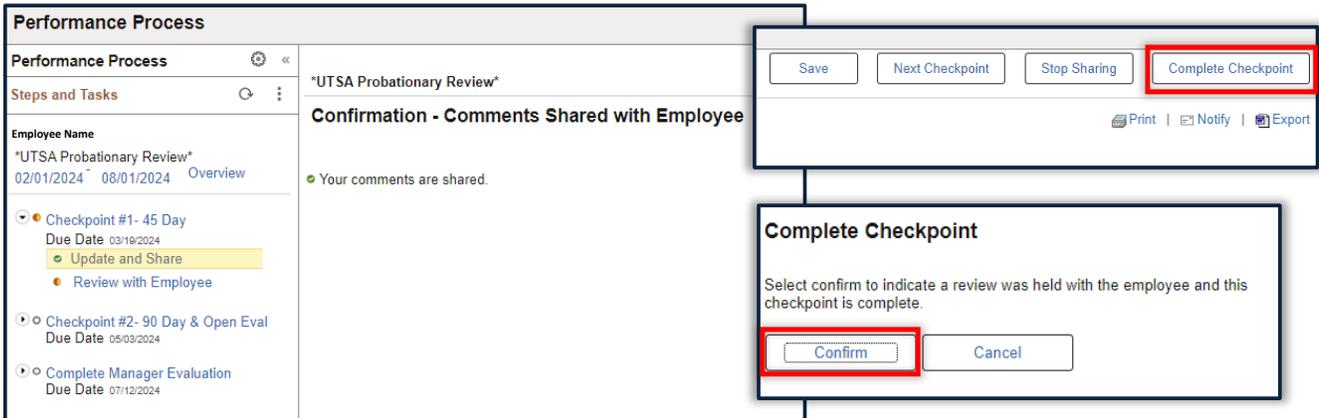
You will be prompted to **Confirm**.



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.



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.

Checkpoint #2 at 90 Days.

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

Once you have met with the employee:

1. Click **Share with Employee** to allow the employee time to review.
2. Click **Open Evaluation** to complete the checkpoint and move the evaluation to the next checkpoint to be conducted at the 160-day milestone.

Contact your HR Business Partner at HRBP@utsa.edu for questions or concerns about the performance evaluation process or Talent Management at training@utsa.edu with system questions.

Section 1 - Probationary Performance Criteria

Expand | Collapse

- > Overall Work Performance
- > UTSA Core Values
- > Employee Strengths
- > Areas of Opportunity

Performance Process

Steps and Tasks

UTSA Probationary Review
02/01/2024 - 08/01/2024 [Overview](#)

- Checkpoint #1- 45 Day
Due Date 03/19/2024
- Checkpoint #2- 90 Day & Open Eval
Due Date 05/03/2024
Update and Complete
- Complete Manager Evaluation
Due Date 07/12/2024

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.



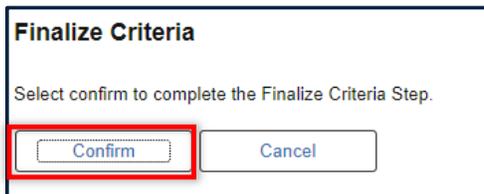
Step 11 – Share with Employee and Open Evaluation

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.

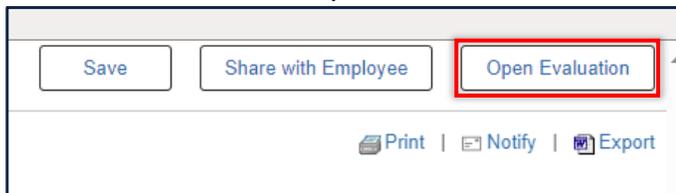


You will be prompted to **Confirm**.



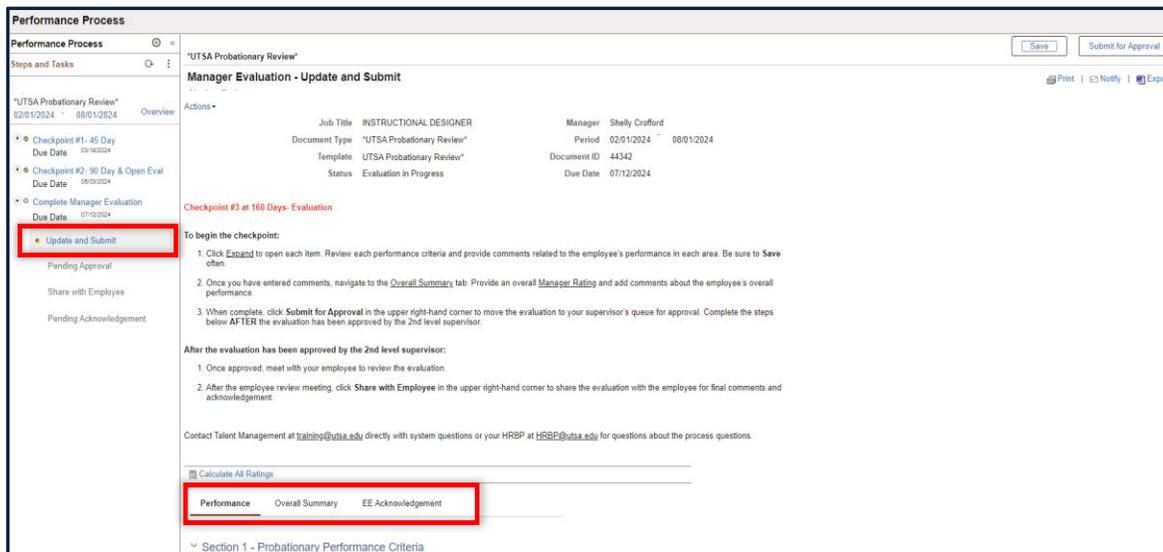
Step 12 – Open the Evaluation

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



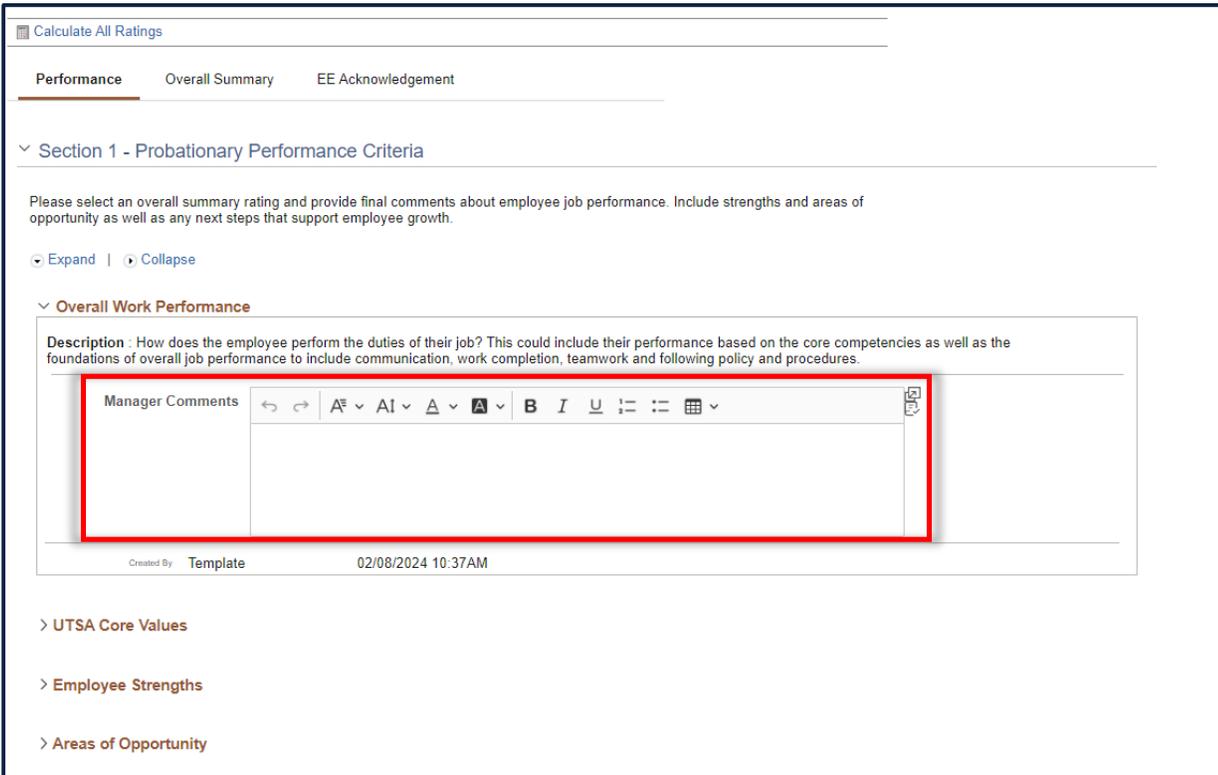
Step 12 – Complete Manager Evaluation (160 Day)

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.



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

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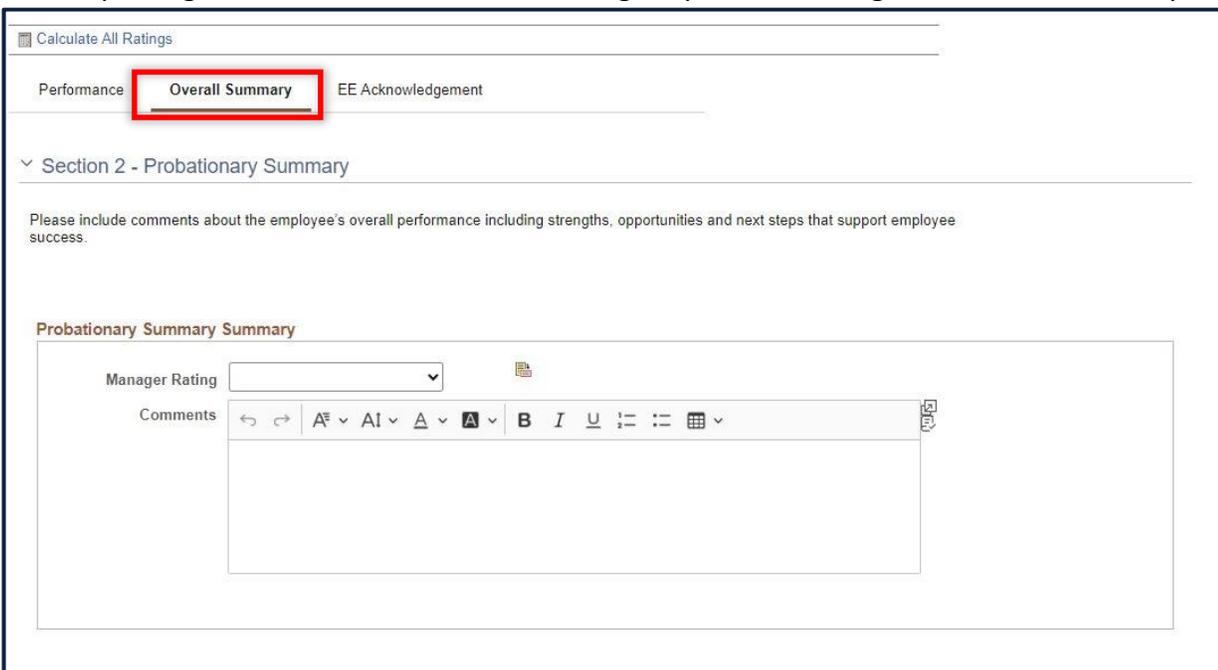
UTSA Core Values

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.



Calculate All Ratings

Performance Overall Summary EE Acknowledgement

Section 2 - Probationary Summary

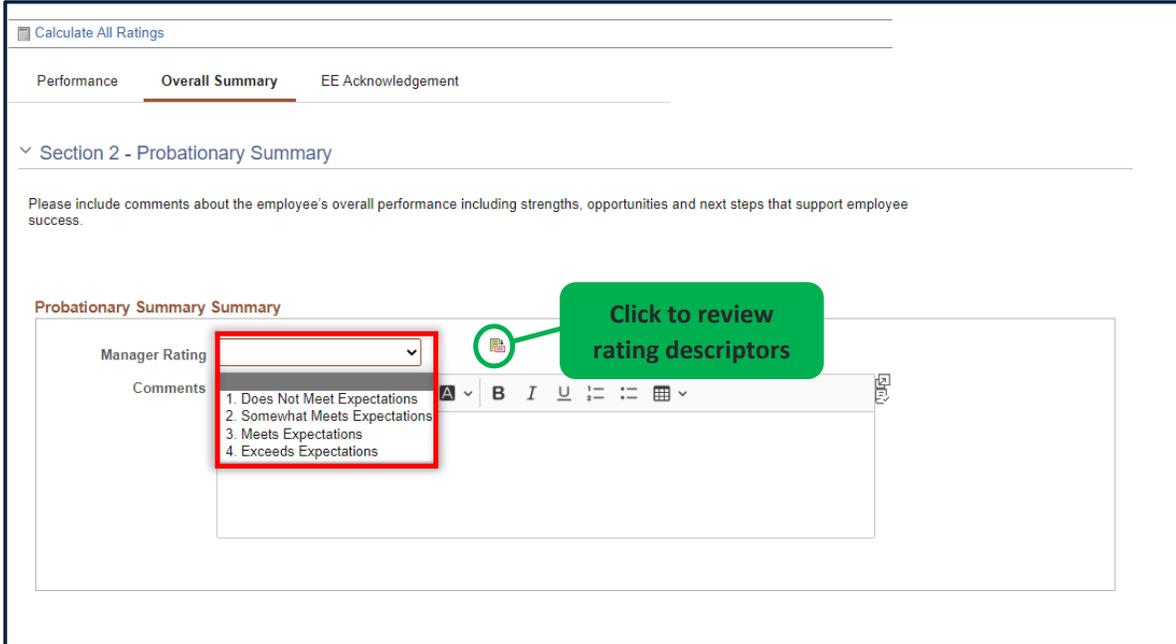
Please include comments about the employee's overall performance including strengths, opportunities and next steps that support employee success.

Probationary Summary Summary

Manager Rating

Comments

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



Calculate All Ratings

Performance Overall Summary EE Acknowledgement

Section 2 - Probationary Summary

Please include comments about the employee's overall performance including strengths, opportunities and next steps that support employee success.

Probationary Summary Summary

Manager Rating

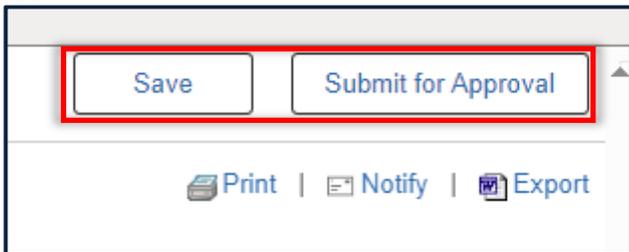
Comments

- 1. Does Not Meet Expectations
- 2. Somewhat Meets Expectations
- 3. Meets Expectations
- 4. Exceeds Expectations

Click to review rating descriptors

Step 15 – Save and Submit for Approval

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



Save Submit for Approval

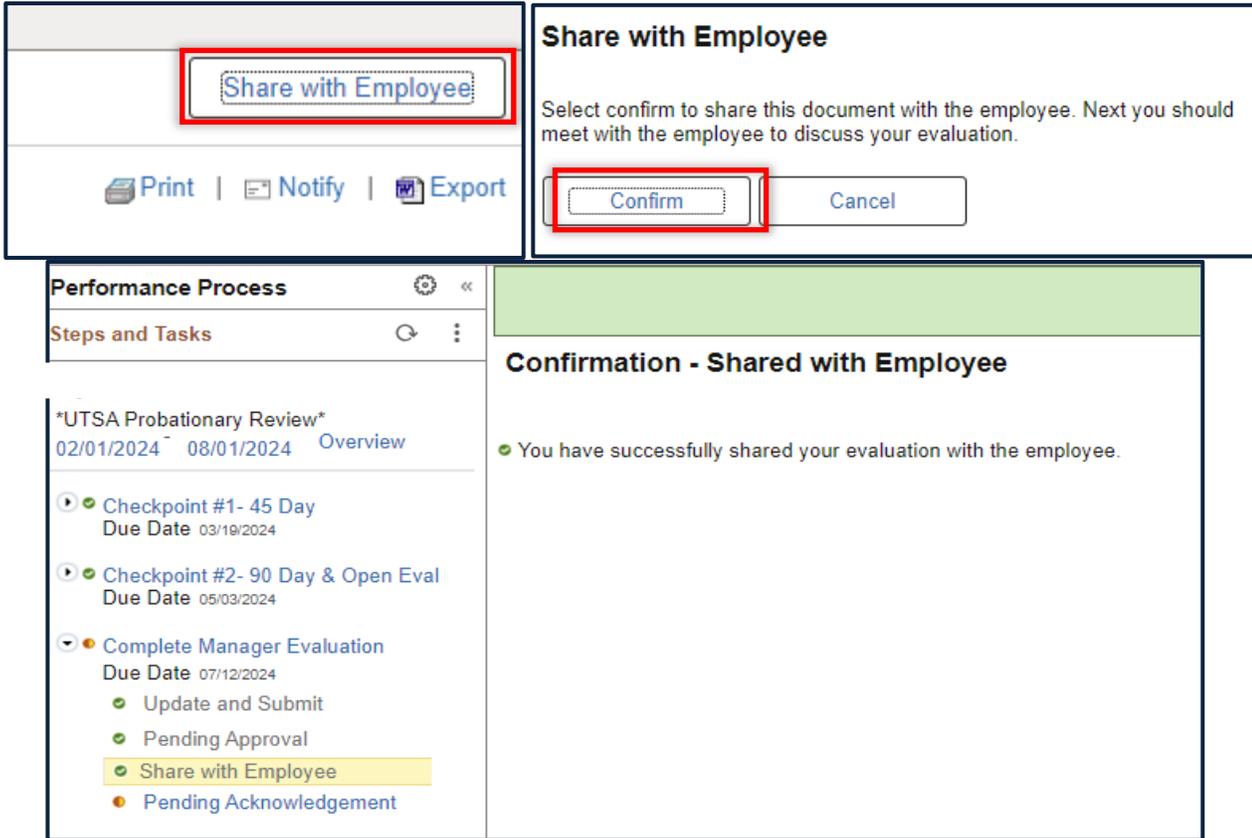
Print | Notify | Export

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.

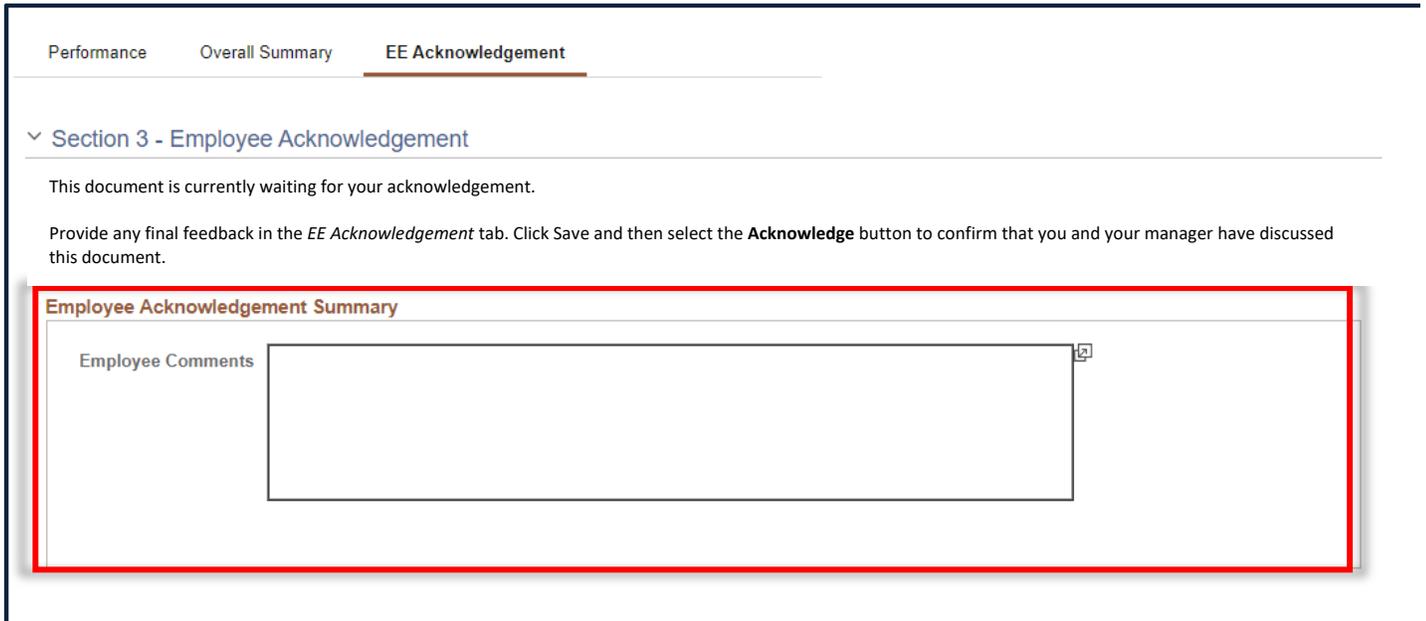


The screenshot shows a 'Share with Employee' dialog box with a 'Share with Employee' button highlighted in red. Below it are 'Print', 'Notify', and 'Export' options. The 'Confirm' button is also highlighted in red. To the right, text reads: 'Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.' Below this text are 'Confirm' and 'Cancel' buttons, with 'Confirm' highlighted in red.

The 'Performance Process' sidebar on the left shows a list of steps and tasks. The 'Share with Employee' task is highlighted in yellow. The main content area shows a 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.

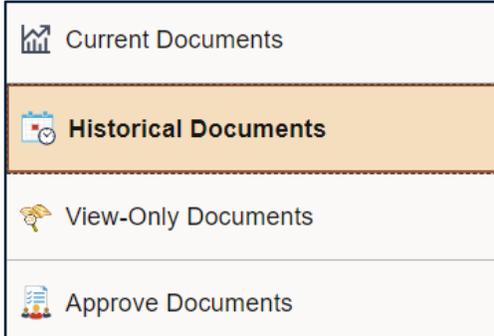


The screenshot shows the 'EE Acknowledgement' tab. It includes a 'Section 3 - Employee Acknowledgement' header and a message: 'This document is currently waiting for your acknowledgement.' Below this is a note: 'Provide any final feedback in the EE Acknowledgement tab. Click Save and then select the Acknowledge button to confirm that you and your manager have discussed this document.'

The 'Employee Acknowledgement Summary' section is highlighted with a red border and contains a text area labeled 'Employee Comments' 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.



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