

**UTSA** People Excellence

# Probationary Review

*Manager*

## Manager Instructions: Probationary Review Checkpoints at 45 & 90 Days and Final Evaluation at 160 Days

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## Overview

The Probationary Review utilizes checkpoints which allow Managers to build upon their feedback throughout the probationary period. Checkpoints will occur at the 45- and 90-day mark. At the 160-day mark, you will complete the checkpoints and begin the probationary review evaluation. Once the evaluation is reviewed and approved by you're the next level supervisor, you will hold a review meeting with your employee. Once complete, the employee will sign in to acknowledge the evaluation and that a review meeting was held.

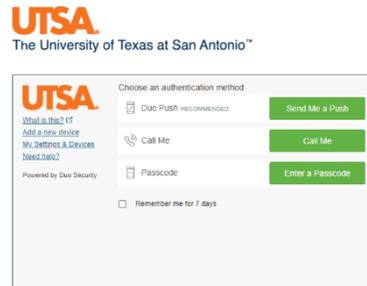
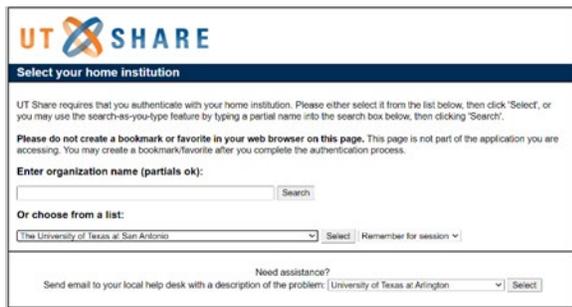
The full process should be completed prior to the end of your 6 months probationary period; therefore, the Manager probationary evaluation should be completed at the 160 day to allow time for approval, the review meeting and employee acknowledgement.

<b>Manager Accesses PeopleSoft to provide comments on Checkpoint #1 @ 45 days</b>	
<b>Manager Shares Comments with Employee</b>	<ul style="list-style-type: none"> <li>• Manager Actions: Share or Skip notifies Employee</li> </ul>
<b>Manager &amp; Employee: One on One Meeting</b>	
<b>Employee provides their feedback and Shares with Manager</b>	<ul style="list-style-type: none"> <li>• Employee Sharing Comments notifies Manager</li> </ul>
<b>Manager Completes Checkpoint #1 @ 45 Day</b>	<ul style="list-style-type: none"> <li>• Manager Completing Checkpoint notifies Employee</li> </ul>
<b>Manager Accesses PeopleSoft to provide comments on Checkpoint #2 @ 90 days</b>	
<b>Manager Shares Comments with Employee</b>	<ul style="list-style-type: none"> <li>• Manager Actions: Share or Skip notifies Employee</li> </ul>
<b>Manager &amp; Employee: One on One Meeting</b>	
<b>Employee provides their feedback and Shares with Manager</b>	<ul style="list-style-type: none"> <li>• Employee Sharing Comments notifies Manager</li> </ul>
<b>Manager Completes Checkpoint #2 @ 90 Day</b>	<ul style="list-style-type: none"> <li>• Manager Completing Checkpoint notifies Employee</li> </ul>
<b>Manager Accesses PeopleSoft to provide comments on Checkpoint #3 @ 160 days</b>	
<b>Manager Completes Checkpoints</b>	
<b>Manager Completes 6 Month Evaluation &amp; Submits for Approval</b>	<ul style="list-style-type: none"> <li>• Manager Submitting for Approval notifies the Next Level Supervisor</li> </ul>
<b>Next Level Supervisor Reviews &amp; Approves</b>	<ul style="list-style-type: none"> <li>• Approval notifies Manager</li> </ul>
<b>Manager Shares Evaluation with Employee</b>	<ul style="list-style-type: none"> <li>• Manager Sharing Eval notifies Employee</li> </ul>
<b>Manager &amp; Employee: One on One Meeting</b>	
<b>Employee Acknowledges (Or Manager Overrides)</b>	<ul style="list-style-type: none"> <li>• Employee Acknowledge notifies Manager</li> </ul>
<b>Manager Completes Evaluation</b>	<ul style="list-style-type: none"> <li>• Both notified when complete</li> </ul>

Evaluation available in 'Historical Documents'

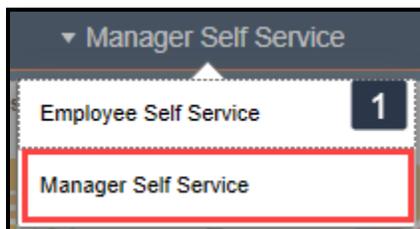
Step 1 of 23 – UTShare

Sign in to [UTShare](#). You will be asked to authenticate yourself.



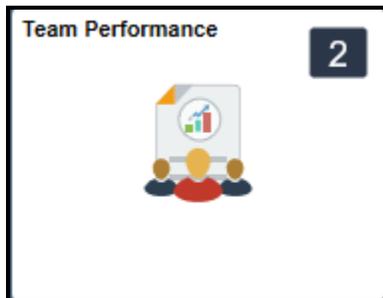
Step 2 of 23 – Manager Self Service

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



Step 3 of 23 – Performance Tile

Select the **Team Performance** tile.



Step 4 of 23 – Current Documents

A list of available **Current Documents** will appear for your team members. Not all Direct Reports will be listed, only those with a current Probationary Review or Annual Evaluation.

The document type **UTSA Probationary Review** will differentiate it from any current Annual reviews. Also, the Document Status will provide what checkpoint the document is currently on and update as the steps progress. Select an employee to continue.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Sharon Williams PROFESSOR	UTSA Performance Evaluation	Define Criteria	09/01/2020 08/31/2021	10/31/2020
James Jiles PROFESSOR	UTSA Probationary Review	Track Progress Checkpoint #1: 45 Day	09/01/2020 02/28/2021	10/16/2020

### Step 5 of 23 – Review and Verify Information

Once the document is opened, you can view the overall document information, the checkpoints and due dates and the document’s instructions. The document instructions will provide helpful reminders on what is expected and what to do next.

The far-left panel **Steps and Tasks** will keep you informed of the current and next steps. Use this to navigate through the sequence of steps.

The screenshot displays the 'Performance Process' interface for a 'UTSA Probationary Review'. The left sidebar shows a 'Steps and Tasks' panel with four items: 'Checkpoint #1: 45 Day' (Due Date: 10/16/2020), 'Checkpoint #2: 90 Day' (Due Date: 11/30/2020), 'Checkpoint #3: 160 Day' (Due Date: 02/08/2021), and 'Complete Manager Evaluation' (Due Date: 02/08/2021). The 'Update and Share' button under the first checkpoint is highlighted.

The main content area is titled 'UTSA Probationary Review' and includes a table of document information:

Job Title	[Redacted]	Manager	[Redacted]
Document Type	UTSA Probationary Review	Period	09/01/2020 - 02/28/2021
Template	UTSA Probationary Review	Document ID	16256
Status	In Progress	Due Date	10/16/2020

Below the table, it states: 'Your comments are currently not shared with your employee'. The main instruction block is titled 'PROBATIONARY REVIEW: Checkpoint #1 at 45 Days.' and contains the following text:

- UTSA Probationary Reviews utilize checkpoints which allow Managers to build upon their feedback throughout the probationary review period. Checkpoints will occur at the 45 and 90 day mark. At the 160 day mark, you will complete the checkpoints to begin the probationary review evaluation.
- You will begin by commenting on the employee's performance over the past 45 days. Once your comments are shared with the employee, they can provide their own comments until you stop sharing the document or complete the checkpoint.
- When meeting held and employee's comments recorded, you will complete the 45 day checkpoint and come back at 90 days to repeat these steps.
- If you have any questions, contact your HRBP at HRBP@utsa.edu or call (210) 458-4250.

Instructions for the checkpoint are provided in three sections:

**To begin the checkpoint:**

1. Enter your comments on the employees progress against their performance criteria. Save to save your work and come back later.
2. When ready to share your feedback, select the Share with Employee button save your changes and notify the employee your comments have been shared. This can be done before or after you meet with the employee to discuss their progress.

**During the checkpoint:**

1. You will retain edit ability while the employee can add their comments. If you add comments while it is shared with the employee, once you save the page, the employee can refresh the document and see your updated comments. You will see the employee comments when they share their comments with you from their document.
2. To continue editing but remove ability for employee to comment, select Stop Sharing. You can re-share or proceed to completing the checkpoint. You do not have to stop sharing to complete the checkpoint.

**To complete the checkpoint:**

1. Once you have shared your comments and had a discussion with your employee, select the Complete Checkpoint button to mark this step as complete.
2. IMPORTANT: If you Complete the checkpoint before the employee shares their comments with you, their comments will not be recorded in the review. Please allow your employee to add their comments, select Share with Manager, and then proceed to complete the checkpoint. If completed too early, you can expand the Checkpoint #1 step in the far last task panel and select Reopen link to reopen the checkpoint and record the employee's comments.
3. You will log back in at a later time and repeat these steps at the 90 and 160 day mark, to be immediately followed with a final probationary evaluation.

At the bottom, there are tabs for 'Core Values', 'Operation Excellence', 'Personal Growth', and 'Overall Summary'. The 'Core Values' section is expanded to show 'Integrity'.

## Step 6 of 23 – Begin Checkpoint #1 at 45 Days

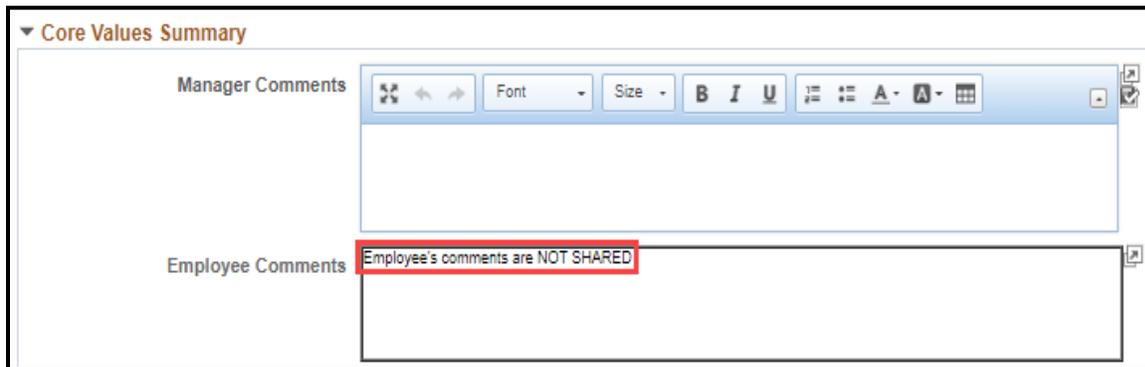
Select the **Expand** link and provide comments on the factors under each tab.

The screenshot displays the 'Core Values' tab in the UTSA People Excellence system. The interface includes a navigation bar with tabs for 'Core Values', 'Operation Excellence', 'Personal Growth', and 'Overall Summary'. Below the navigation bar, there is a section titled 'Section 1 - Core Values' with an 'Expand' link and a 'Collapse' link. Underneath, a list of core values is shown: Integrity, Excellence, Inclusiveness, Respect, Collaboration, and Innovation. At the bottom, there is a 'Core Values Summary' section with a 'Manager Comments' text area and a rich text editor toolbar. Below the manager comments is an 'Employee Comments' box containing the message: 'Employee's comments are NOT SHARED'.

Notice the message within the Employee Comments box. The employees can provide their feedback at any time, even before you share your document with them. This is to mimic the ability of a self-evaluation.

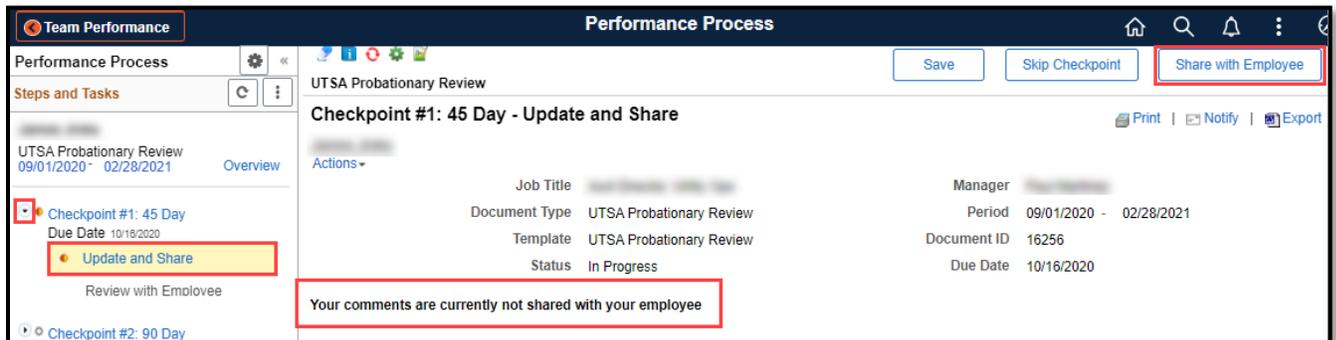
When this message is seen: *Employee's comments are not shared*: if the Employee has added comments, they have not shared them with you. You will receive an email when the employee shares their comments with you.

Once employee shares their document, you can refresh the page or log in again to see the comments.

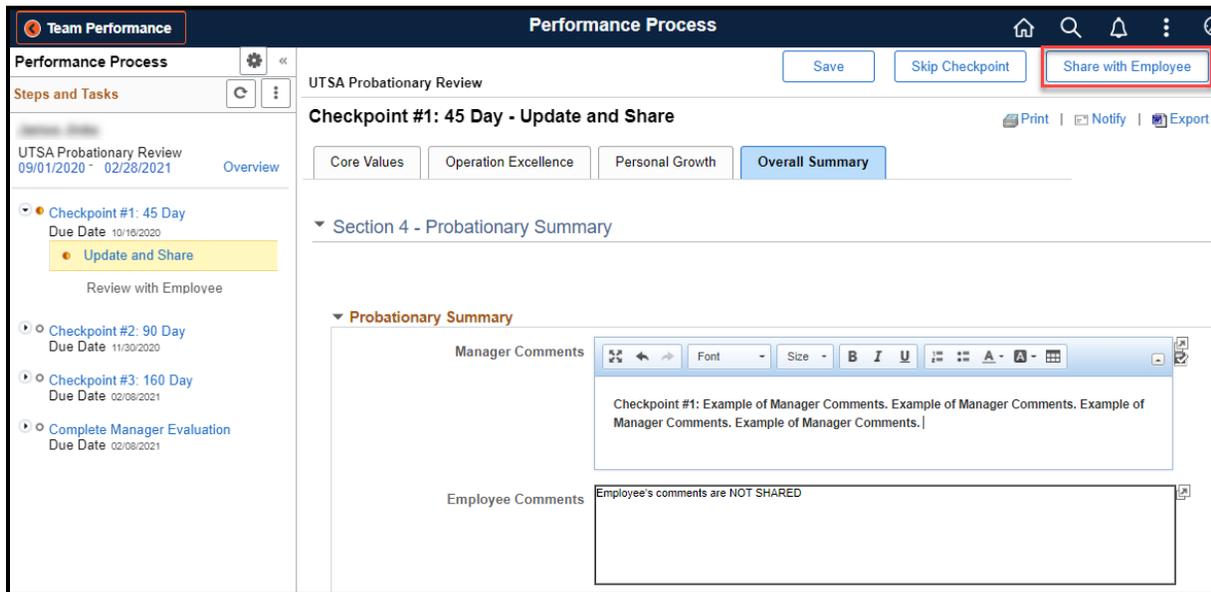


### Step 7 of 23 – Share Checkpoint #1 Comments with Employee

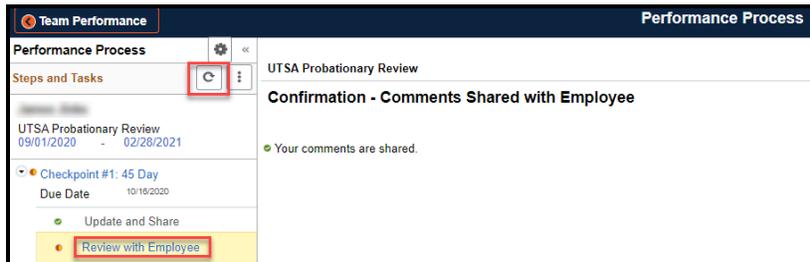
You'll notice that while your comments are not shared, you have an action button of **Save / Share with Employee** and also a status at the top of the document that will always let you know whether your comments are shared or private. There is also an option to Skip the checkpoint step. This should not be used.



Once your comments are complete and you'd like to share your comments with your employee, select **Share with Employee** and then Confirm.



Once shared and confirmed, you can refresh the Task Panel and select the *Review with Employee* link to view the document again.



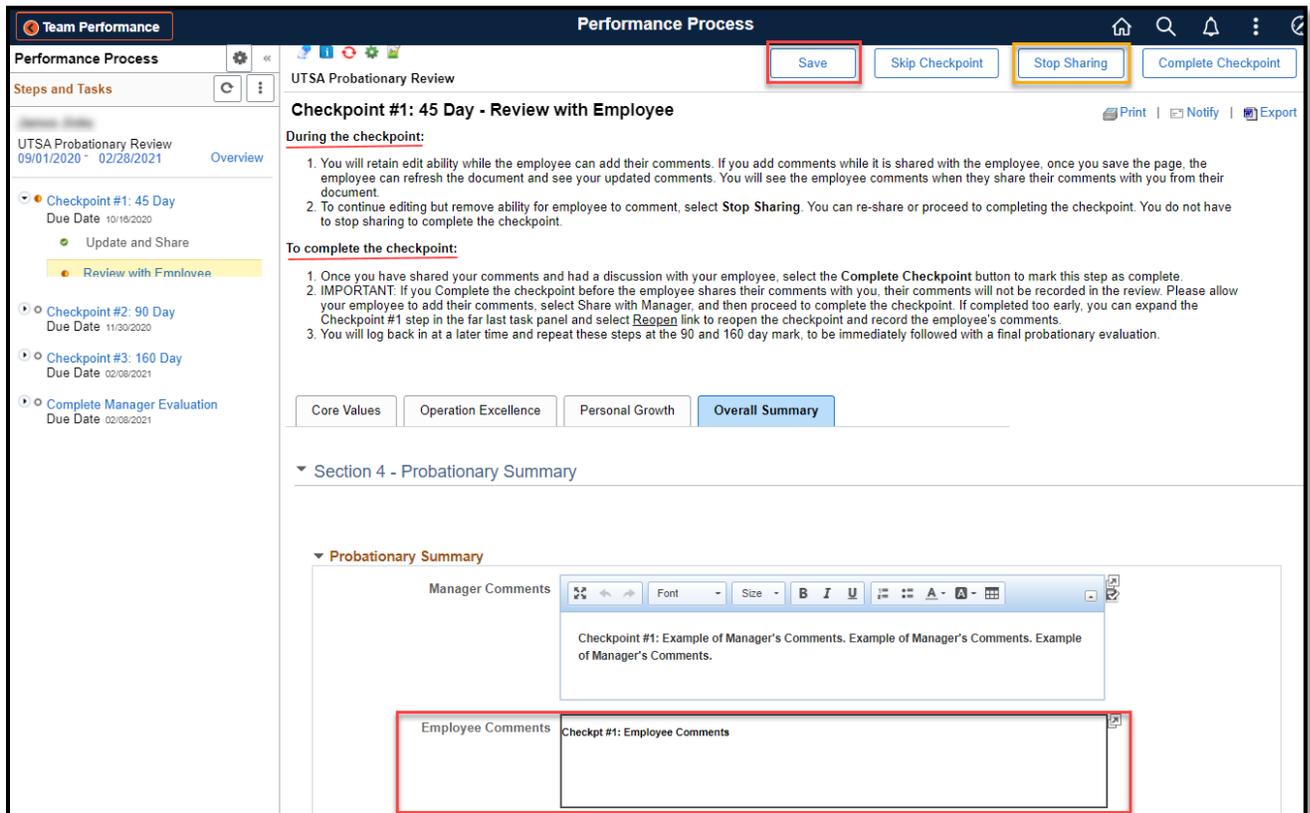
### Step 8 of 23 – During Checkpoint: Review Meeting & Employee Comments

Your employee will receive an email once you share the document with them. You will now schedule a meeting to review. They can provide their feedback before or after the review meeting.

However, you will retain edit ability to your comments while the document is Shared. You can add notes and **Save** for the employee would be able to refresh the page or log in again to see the updated comments. You also have the option to **Stop Sharing** to pull the document back to your queue, edit, and then **Save/Share with Employee** again.

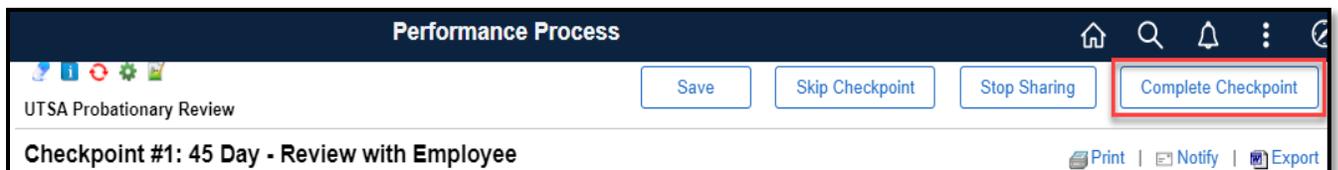
### Step 9 of 23 – During Checkpoint: After Employee Comments Shared

When the employee shares their comments with you, you will receive an email. However, their feedback is not necessary to move forward and complete the checkpoint.



### Step 10 of 23 – Completing the Checkpoint

When the checkpoint is complete and no further action is needed, select **Complete Checkpoint**.

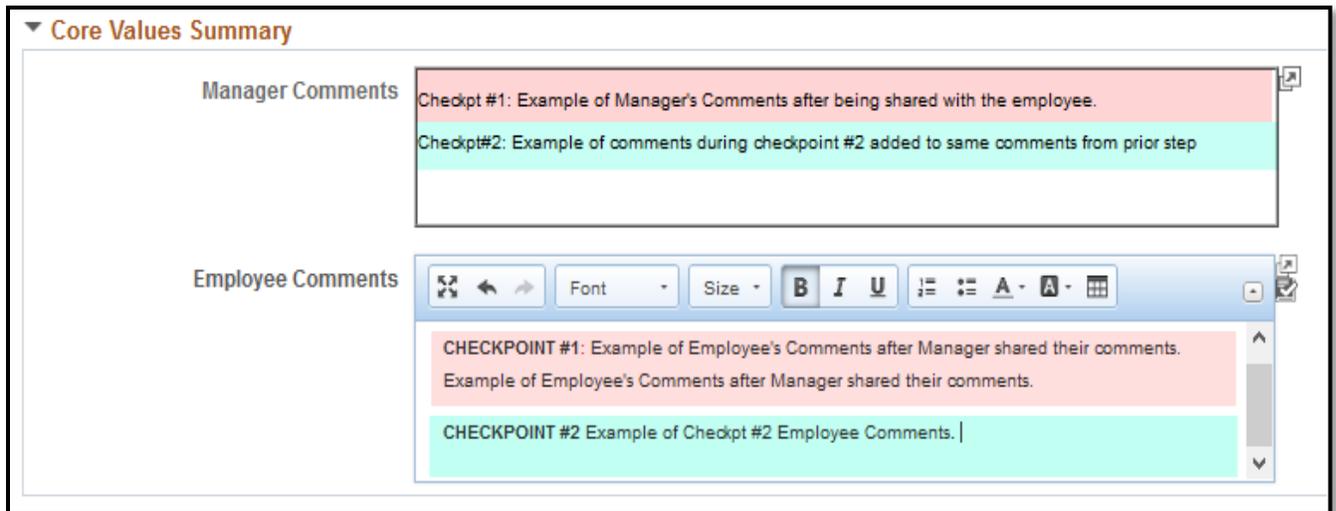


### Step 11 of 23 – Checkpoint #1 at 45 Days Complete

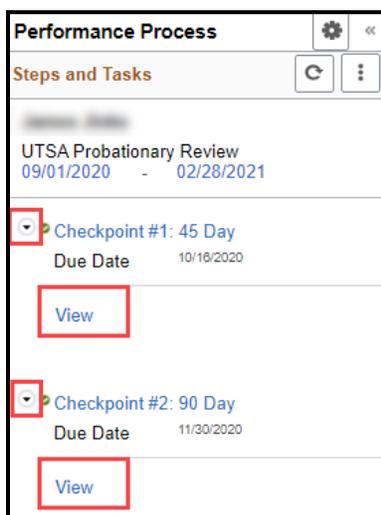
No further action is required until the next checkpoint at 90 Days but you do have the ability to add and save notes within the document until the next checkpoint occurs.

### Step 12 of 23 – Checkpoint #2 at 90 Days

Checkpoint #2 will be an exact repetition of Checkpoint #1, Steps 1 – 11. The only difference is that the comments from Checkpoint #1 are automatically added to Checkpoint #2.



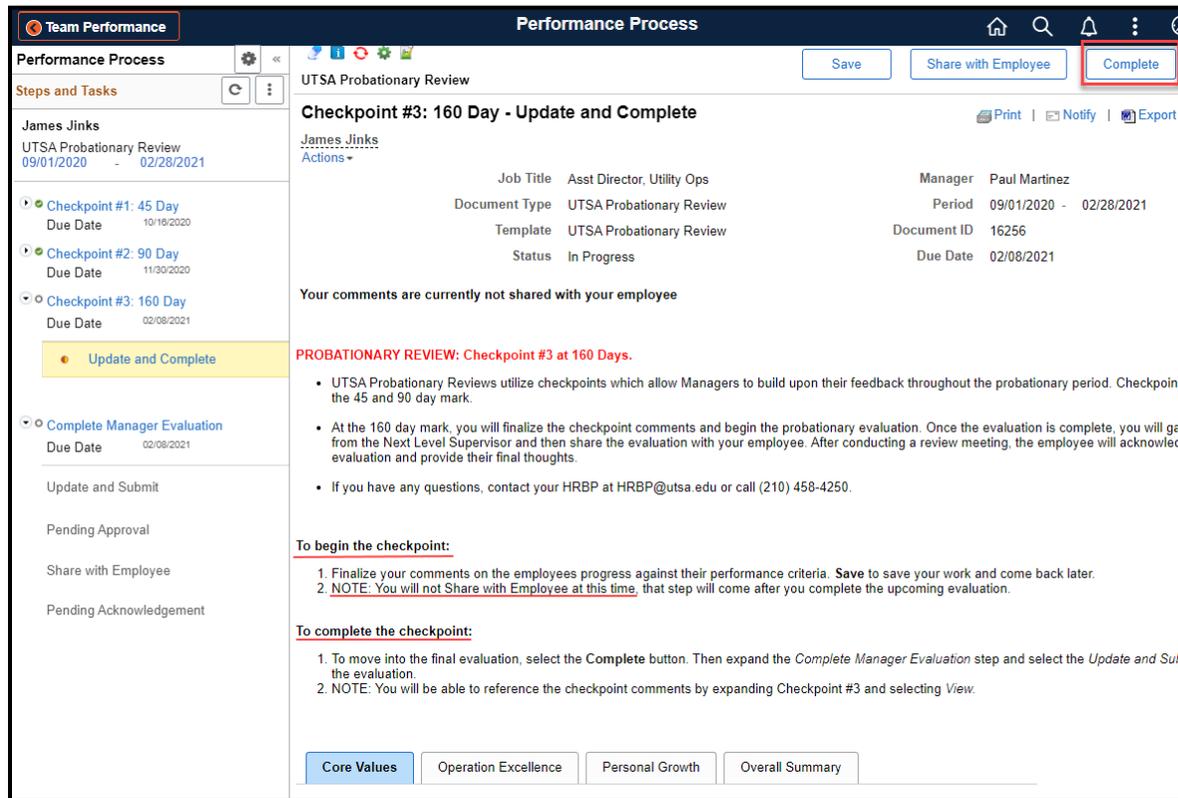
You can simply add more comments, separate your comments by colored font or bullet points to differentiate between Checkpoint #1 and #2, or delete everything and start fresh. The comments for Checkpoint#1 will always be separate and available to view by expanding the Checkpoint steps within the document and selecting *View*.



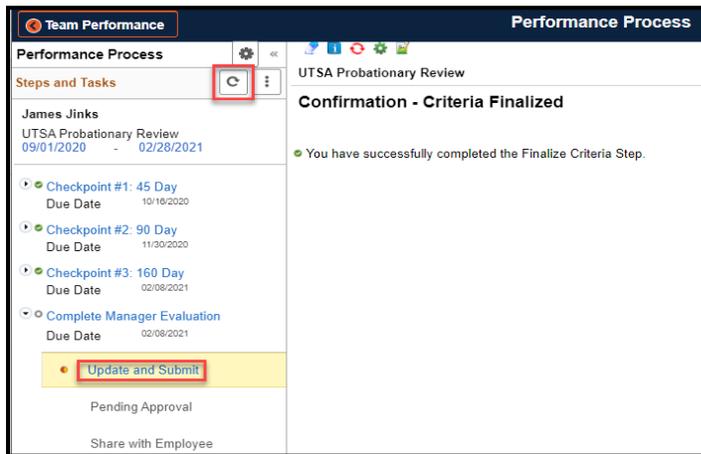
### Step 13 of 23 – Checkpoint #3 at 160 Days – Finalize & Complete

Checkpoint #3 and the final Probationary Review are combined. This step is to finalize any comments prior to beginning the evaluation OR utilize it as a way to gather your employee’s feedback prior to the final evaluation. However, you can immediately move past Checkpoint 3 to begin the evaluation.

If you decide to gather your employee’s feedback prior to the final evaluation, you can Share with the Employee to alert them it’s time to log in and provide their feedback.



Once you select Complete and confirm, you can refresh the Task Panel and then select Update and Submit to open the evaluation.



### Step 14 of 23 – Completing the Manager’s Evaluation

The Probationary Review will contain all of the same questions as the Checkpoints and function exactly like the Annual Evaluations in that a final rating will be calculated.

Notice that the comments from prior checkpoints are not included. You can use the opportunity to provide a summary of performance or you can expand Checkpoint #3 to View the Checkpoint document of accumulated comments and copy/paste as needed.

**Team Performance** Performance Process

Performance Process UTSA Probationary Review Save Submit for Approval

Steps and Tasks

- UTSA Probationary Review 09/01/2020 - 02/28/2021
- Checkpoint #1: 45 Day Due Date 10/16/2020
- Checkpoint #2: 90 Day Due Date 11/30/2020
- Checkpoint #3: 160 Day Due Date 02/08/2021**

[View](#) 

[Reopen](#)

Complete Manager Evaluation Due Date 02/08/2021

- Update and Submit**
- Pending Approval
- Share with Employee
- Pending Acknowledgement

**Manager Evaluation - Update and Submit** Print Notify Export

Actions

Job Title  Manager

Document Type UTSA Probationary Review Period 09/01/2020 - 02/28/2021

Template UTSA Probationary Review Document ID 16256

Status Evaluation in Progress Due Date 02/08/2021

Enter ratings and comments for each section in this evaluation, if applicable.  
At any point in time you can save this evaluation by selecting the **Save** button.

Calculate All Ratings

**Core Values** | Operation Excellence | Personal Growth | Overall Summary | EE Acknowledgement | Privacy Notice

Section 1 - Core Values

We encourage an environment of dialogue and discovery, where integrity, excellence, inclusiveness, respect, collaboration and innovation are fostered. UTSA's core values reflect how we, as employees, have pursued this plan as well as how we will fulfill our mission and realize our vision.

Expand |  Collapse

**Integrity**

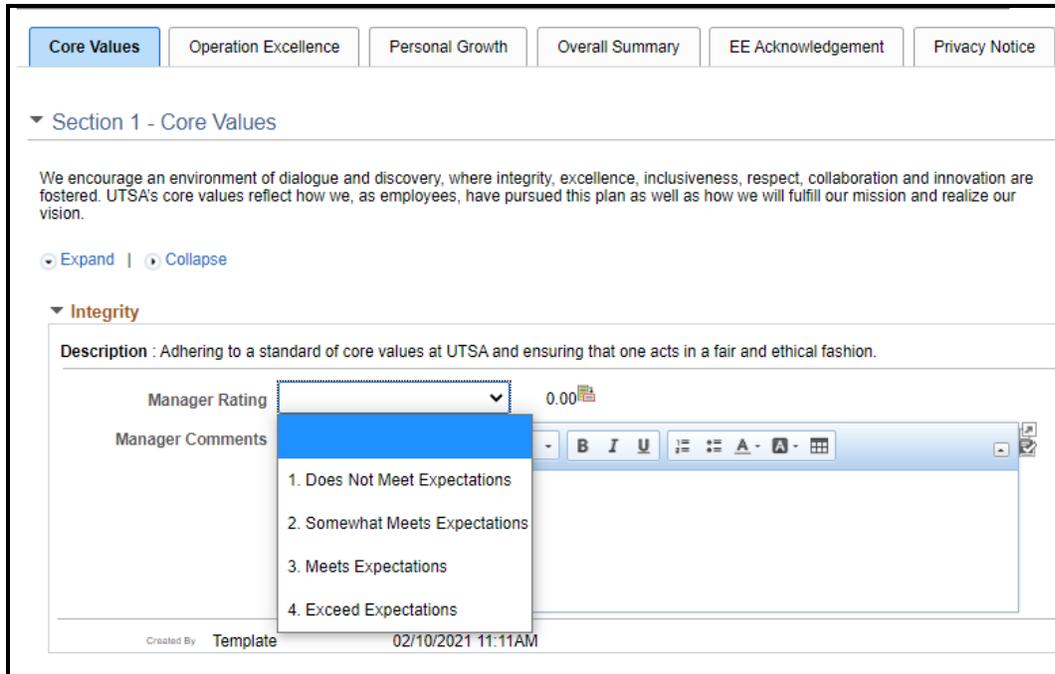
Description : Adhering to a standard of core values at UTSA and ensuring that one acts in a fair and ethical fashion.

Manager Rating

Manager Comments

Step 15 of 23 – Evaluate Core Values

Select the **Core Values** tab, click Expand and provide **Comments** for each Core Value. Rate the employee on each competency on a 1-4 scale.



Step 16 of 23 – Evaluate Operation Excellence & Personal Growth

Repeat step 15 for **Operation Excellence** tab and **Personal Growth** tab.

Step 17 of 23 – Overall Summary

Select the **Overall Summary** tab. Click Calculate All Ratings link to calculate average ratings. Provide overall **Comments** for the evaluation.

Status Evaluation in Progress Due Date 02/08/2021

Enter ratings and comments for each section in this evaluation, if applicable.  
At any point in time you can save this evaluation by selecting the **Save** button.

[Calculate All Ratings](#)

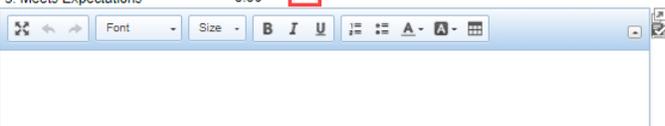
[Core Values](#) | [Operation Excellence](#) | [Personal Growth](#) | **[Overall Summary](#)** | [EE Acknowledgement](#) | [Privacy Notice](#)

▼ **Section 4 - Probationary Summary**

Please comment on work that is less than satisfactory and include recommendations for aiding the employee in continuing his/her progress. If problem areas exist, please indicate the nature of the problem including dates of counseling, supervisory action taken and recommendation for improvement.

**Probationary Summary Summary**

Manager Rating 3. Meets Expectations 3.50 

Comments 

### Step 18 of 23 – EE Acknowledgment Tab

Note: *EE Acknowledgment* will be completed at a later step. It will remain blank until the document is shared with the employee to view their evaluation. This will occur after your Supervisor reviews.

[Core Values](#) | [Operation Excellence](#) | [Personal Growth](#) | [Overall Summary](#) | **[EE Acknowledgement](#)** | [Privacy Notice](#)

▼ **Section 5 - Employee Acknowledgement**

Prior to the employee acknowledging the probationary review, they may provide comments below. By acknowledging this probationary appraisal, the Employee confirms that a meeting was held to review and discuss the appraisal.

**Employee Acknowledgement Summary**

Employee Comments 

### Step 19 of 23 – Submit for Approval

Select **Save**. This allows you to save where you are and come back later to edit.

If you are done with the evaluation, click **Submit for Approval** for Next Level Supervisor Approval.

The screenshot shows a web interface for 'Performance Process'. At the top, there is a 'Team Performance' tab and a 'Performance Process' header. On the right side of the header, there are buttons for 'Save' and 'Submit for Approval', with the latter highlighted by a red box. Below the header, the main content area is titled 'Manager Evaluation - Update and Submit'. It includes a 'Steps and Tasks' sidebar on the left, a 'UTSA Probationary Review' title, and a 'Manager Evaluation - Update and Submit' section. At the bottom, there are fields for 'Job Title', 'Manager', 'Document Type' (UTSA Probationary Review), and 'Period' (09/01/2020 - 02/28/2021). There are also 'Print', 'Notify', and 'Export' options.

**Note:** If you hold multiple positions, choose the position that relates to the manager role to evaluate the employee.

Data				
	Job Title	Department	Supervisor Name	Company
<input checked="" type="radio"/>	PROFESSOR	COS BIOLOGY	Garry White	University of Texas, San Anton
<input type="radio"/>	ENDOWED CHAIR	COS BIOLOGY	Garry White	University of Texas, San Anton

### Step 20 of 23 – Next Level Supervisor Approval

Your Supervisor will receive an email to log in and review/approve the probationary review. Once approved, you will receive an email notification.

**Note:** Denied evaluations will include comments for rework within the email only. Approver comments are not available on the document itself.

### Step 21 of 23 – Share Evaluation with Employee

Repeat Steps 1-4 to access the document currently in an *Approval- Approved* status.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
[Redacted]	UTSA Probationary Review	Approval - Approved	09/01/2020 02/28/2021	02/08/2021

Select **Share with Employee**. Until the document is shared, the employee cannot view the evaluation or prior checkpoints.

Performance Process

UTSA Probationary Review

**Manager Evaluation - Share with Employee**

Print | Notify | Export

Job Title [Redacted] Manager [Redacted]

Document Type UTSA Probationary Review Period 09/01/2020 - 02/28/2021

Once Shared, you can refresh the Task Panel and select the current step *Pending Acknowledgement*.

The screenshot shows the 'Performance Process' interface. On the left, under 'Steps and Tasks', there is a list of tasks for 'UTSA Probationary Review' (09/01/2020 - 02/28/2021). The tasks include three checkpoints and a 'Complete Manager Evaluation' task. The 'Complete Manager Evaluation' task is highlighted with a red box, and its sub-tasks are listed below it: 'Update and Submit', 'Pending Approval', 'Share with Employee', and 'Pending Acknowledgement' (which is also highlighted with a red box). On the right, a confirmation message states 'Confirmation - Shared with Employee' and 'You have successfully shared your evaluation with the employee.' A red box highlights a 'C' icon in the top left corner of the task list area.

### Step 22 of 23 – Employee Acknowledgement

The employee receives an email to alert them its time to acknowledge their probationary review.

After the document has been acknowledge by the employee, you will receive an email that contains their final comments and then the system will automatically complete the document on your behalf.

### Step 23 of 23 – Probationary Review Complete

You can find the document within your Team **Performance Tile** > **Historical Documents** where you can review each of the checkpoints and final evaluation in the future.

The screenshot shows the 'Team Performance' interface. On the left, there is a navigation menu with 'Historical Documents' highlighted in green and a red box. The main area is titled 'Historical Documents' and contains a table with the following data:

Name / Job Title	Document Type	Document Status	Period Begin / Period End
[Redacted]	UTSA Probationary Review	Completed	09/01/2020 02/28/2021

The 'Completed' status in the table is highlighted with a red box.

**Team Performance**
**Performance Process**
🏠 🔍 🔔 ⋮

**Performance Process**

**Steps and Tasks**

UTSA Probationary Review  
09/01/2020 - 02/28/2021

**Checkpoint #1: 45 Day**  
Due Date 10/16/2020  
[View](#)

**Checkpoint #2: 90 Day**  
Due Date 11/30/2020  
[View](#)

**Checkpoint #3: 160 Day**  
Due Date 02/08/2021  
[View](#)

**Complete Manager Evaluation**  
Due Date 02/08/2021  
[View](#)

**UTSA Probationary Review**

**Manager Evaluation - Completed**

Print | Notify | Export

**Actions**

Job Title	[Redacted]	Manager	[Redacted]
Document Type	UTSA Probationary Review	Period	09/01/2020 - 02/28/2021
Template	UTSA Probationary Review	Document ID	16256
Status	Completed	Due Date	02/08/2021

The document status is Complete. No further action is required but if you have any questions, please contact HR at 210-458-4250 or at one of the email addresses below.

- Annual Evaluations: HR@utsa.edu
- Probationary Reviews: HRBP@utsa.edu

Core Values
Operation Excellence
Personal Growth
Overall Summary
EE Acknowledgement
Privacy Notice

▼ Section 1 - Core Values

We encourage an environment of dialogue and discovery, where integrity, excellence, inclusiveness, respect, collaboration and innovation are fostered. UTSA's core values reflect how we, as employees, have pursued this plan as well as how we will fulfill our mission and realize our vision.

Expand | Collapse

► Integrity