



Employee Self – Evaluation ePerformance

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Overview

The Employee Self Evaluation allows an employee to complete self-assessment on his/her job performance. These steps are to be completed prior to the supervisor hosting a performance appraisal meeting with employee.

Employee Accesses PeopleSoft

Employee Completes Self Evaluation

- This section requires employees to rate him/herself in **Quality of Work, Employee Performance, Compliance Questions, Supervisor Performance Factors** (if applicable), complete a **Development Plan**.

Employee Submits Evaluation to Manager

- Submission Generates Email to Manager

Manager & Employee:

One on One Meeting

Once Manager completes the evaluation: Manager Requests Acknowledgement from Employee

- Requesting Acknowledgement generates an email to Employee

Employee Acknowledges (Or Manager Overrides)

- Acknowledgement generates an email to Manager

Manager Completes Evaluation

- Completion generates an email to Manager and Employee

Evaluation available in 'Historical Documents'



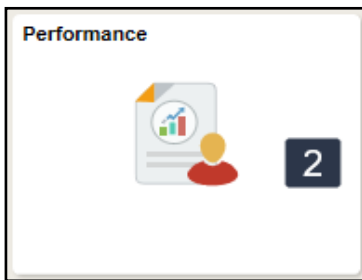
Step 1 of 16 – Employee Self Service

Select the **Employee Self Service** option from the dropdown in the PeopleSoft homepage.



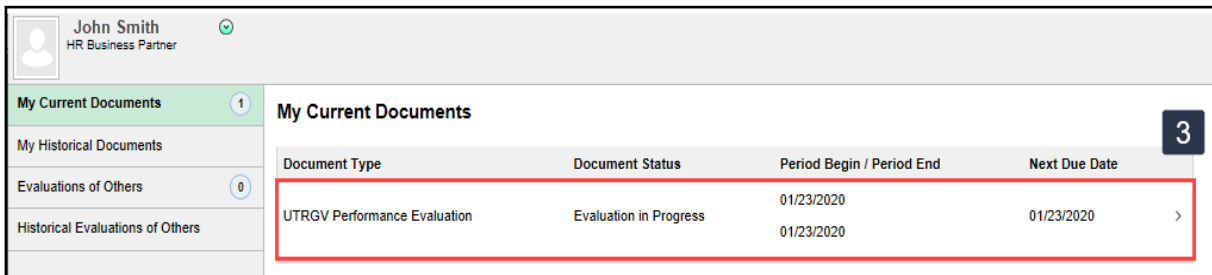
Step 2 of 16 – Performance Tile

Select the **Performance** tile.



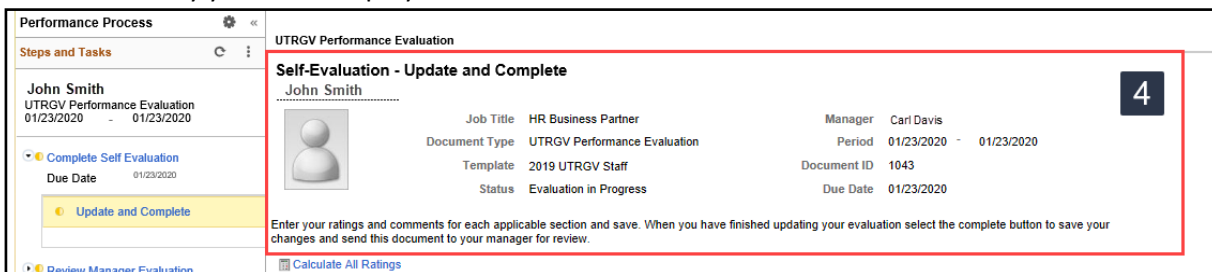
Step 3 of 16 – My Current Documents

The performance documents will appear under **My Current Documents**. Select UTRGV Performance Evaluation.



Step 4 of 16 – Verify

Be sure to verify your own employee information.





Step 5 of 16 – Quality of Work

Select the **Quality of Work** tab.

Note: Essential Function #4 and #5 can be deleted if not needed. Select the trash icon to delete essential functions.

- If Essential Function 4 and 5 are deleted, by choice or mistake user can add them back by selecting the Add Item link.

The screenshot displays the 'Quality of Work' tab in the Employee Self-Evaluation system. At the top, there are navigation tabs: 'Quality of Work' (highlighted with a red box), 'Employee Performance', 'Additional Questions', 'Development Plan', and 'Overall Summary'. Below these is a section titled 'Section 1 - Quality of Work Analysis: Essential Functions'. This section includes expand/collapse controls and an 'Add Item' button (highlighted with a yellow box). A list of essential functions is shown, with 'Essential Function #4' expanded. For this function, there is a 'Description' field containing the text: 'Identify and describe an essential job responsibility of the position. In support of the rating given, describe how well the employee performs this duty and provide specific work examples.' To the right of the description is a 'Delete Essential Functions' button (highlighted with a black box) and a trash icon (highlighted with a red box). Below the description is an 'Employee Rating' dropdown menu set to '0.00' and an 'Employee Comments' text area with a rich text editor toolbar.



- When selecting the Add Item link, click **Search** and the available essential functions to add back will be displayed.
- Click **Add** and follow steps 7 and 8 to (Rate/Comment) the Essential Function just added.

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

Note:
No Search
Criteria is
needed.

1 Search

Clear

Search Results



1-1 of 1

Quality of Work Analysis: Essential Functions

2

Essential Function #5

Select All

Deselect All

3 Add

[Return](#)



Step 6 of 16 – Expand

Select the Expand link to see all sections.

Self-Evaluation - Update and Complete

[Expand](#) | [Collapse](#)

▼ **Essential Function #1**

Description : Identify and describe an essential job responsibility of the position.
In support of the rating given, describe how well the employee performs this duty and provide specific work examples.

Employee Rating: 5- Exceptional 5.00

Employee Comments

Employee Comments

Created By: Template 02/20/2020 2:41PM

▼ **Essential Function #2**

Description : Identify and describe an essential job responsibility of the position.
In support of the rating given, describe how well the employee performs this duty and provide specific work examples.

Employee Rating: 5- Exceptional 5.00

Employee Comments

Employee Comments.

Created By: Template 02/20/2020 2:41PM

▼ **Essential Function #3**

Description : Identify and describe an essential job responsibility of the position.
In support of the rating given, describe how well the employee performs this duty and provide specific work examples.

Employee Rating: 5- Exceptional 5.00

Employee Comments

Employee Comments.

Step 7 of 16 – Ratings

Choose from ratings to rate yourself.

Step 8 of 16 – Comments

Enter **Comments**.

Step 9 of 16 – Additional tabs

Repeat steps 6-8 for the following tabs:



- a. Employee Performance
- b. Additional Questions
- c. Development Plans

UTRGV Performance Evaluation

Self-Evaluation - Update and Complete
changes and send this document to your manager for review.

5 Calculate All Ratings

a b c

Quality of Work Employee Performance Additional Questions Development Plan Overall Summary

6 Section Quality of Work Analysis: Essential Functions

Expand Collapse

Essential Function #1

Description: Identify and describe an essential job responsibility of the position.
In support of the rating given, describe how the employee performs this duty and provide specific work examples.

7

Employee Rating 3.00

Employee Comments

8

1- Unsatisfactory
2- Inconsistent
3- Satisfactory
4- Periodic Exceptional
5- Exceptional

Satisfactory work for essential function 1.

Created By Template 01/23/2020 11:03AM
Last Modified By 01/23/2020 11:26AM

Step 10 of 16 – Calculator

Click on the calculator icon to calculate the average for the Employee Rating.

Step 11 of 16 – Comments

Enter **Comments**.

Quality of Work Analysis: Essential Functions Summary

Summary Weight 55 %

Employee Rating 3- Satisfactory 3.00

Employee Comments

Add additional comments

Step 12 of 16 – Overall Summary tab

Select the **Overall Summary** tab.

Step 13 of 16 – Calculator

Click on the calculator to calculate the total average rating for all.



Step 14 of 16 – Comments

Enter **Overall Summary** comments.

Performance Process

Steps and Tasks

John Smith
UTRGV Performance Evaluation
01/24/2020 - 01/24/2020

- Complete Self Evaluation
Due Date 01/24/2020
- Update and Complete**
- Review Manager Evaluation
Due Date 01/24/2020

UTRGV Performance Evaluation

Self-Evaluation - Update and Complete
John Smith

Job Title: HR Business Partner
Document Type: UTRGV Performance Evaluation
Template: Staff Evaluation: 2019
Status: Evaluation in Progress

Manager: Carl Davis
Period: 01/24/2020 - 01/24/2020
Document ID: 1046
Due Date: 01/24/2020

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

Calculate All Ratings

Quality of Work | Employee Performance | Additional Questions | Development Plan | **Overall Summary** ¹²

Section 5 - Overall Summary

Employee Rating: 3 - Satisfactory 3.00 ¹³

Employee Comments

An overall summary comments. ¹⁴

Step 15 of 16 – Save

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

Step 16 of 16 – Complete

If you are done with your self- evaluation, click **Complete**. Manager will receive an email once employee self- evaluation is completed.

Performance Process

Steps and Tasks

John Smith
UTRGV Performance Evaluation
01/23/2020 - 01/23/2020

- Complete Self Evaluation
Due Date 01/23/2020
- Update and Complete**
- Review Manager Evaluation
Due Date 01/23/2020

UTRGV Performance Evaluation

Self-Evaluation - Update and Complete
John Smith

Job Title: HR Business Partner
Document Type: UTRGV Performance Evaluation
Template: 2019 UTRGV Staff
Status: Evaluation in Progress

Manager: Carl Davis
Period: 01/23/2020 - 01/23/2020
Document ID: 1043
Due Date: 01/23/2020

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

Calculate All Ratings

Quality of Work | Employee Performance | Additional Questions | Development Plan | **Overall Summary**

15 **Save** **Complete** **16**



Complete Evaluation ×

You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.