



## Employee Self – Evaluation ePerformance

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## Overview

The Employee Self Evaluation - Supervisor allows an employee to complete self-assessment on his/her job performance and Supervisor role. This step is 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 and Performance, New Year's Goals** for AP employees.

Employee Submits Evaluation to Manager

- Submission Generates Email to Manager

Manager & Employee:  
One on One Meeting

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Evaluation available in 'Historical Documents'



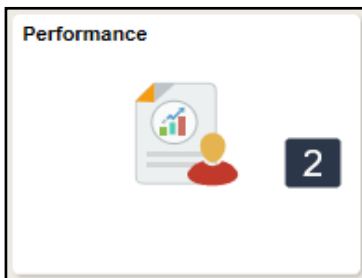
### Step 1 of 14 – Employee Self Service

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



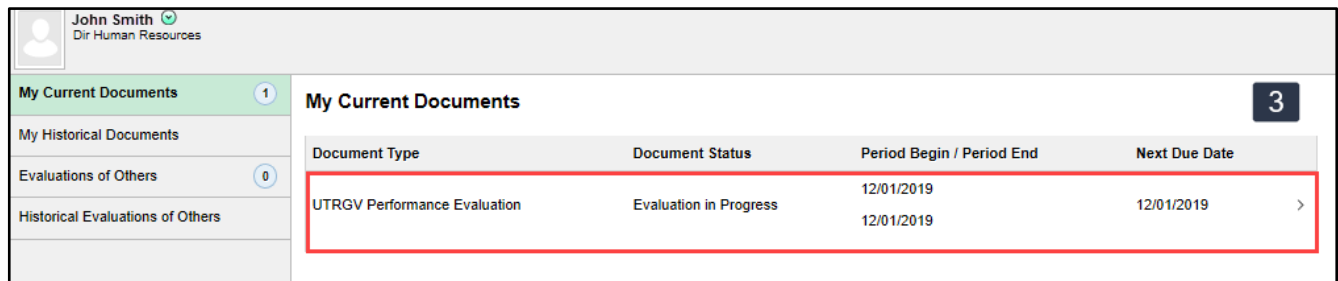
### Step 2 of 14 – Performance Tile

Select the **Performance** tile.



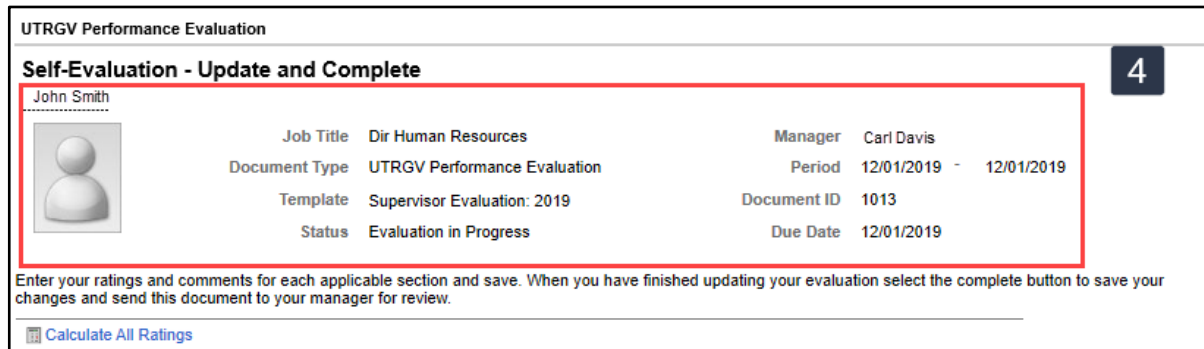
### Step 3 of 14 – My Current Documents

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



### Step 4 of 14 – Verify

Be sure to verify your own employee information.





## Step 5 of 14 – 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 self-evaluation system. At the top, there are navigation tabs: 'Quality of Work' (highlighted with a red box), 'Employee Performance', 'Manager Performance', 'Additional Questions', 'Development Plan', and 'Overall Summary'. Below the tabs, the section is titled 'Section 1 - Quality of Work Analysis: Essential Functions'. There are expand/collapse controls and an 'Add Item' button (highlighted with a red box). A list of essential functions is shown, with 'Essential Function #4' expanded. For this function, there is a 'Description' field with the text: 'Identify and describe an essential job responsibility of the position.' and '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 red box) and a trash icon. 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 14 – 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

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

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

## Step 7 of 14 – Ratings

Choose from ratings to rate yourself.

1 = Unsatisfactory to 5= Exceptional

## Step 8 of 14 – Comments

Enter **Comments**.



## Step 9 of 14 – Additional tabs

Repeat steps 6-8 for the following tabs:

- Employee Performance
- Manager Performance
- Additional Questions
- Development Plan
- Overall Summary

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

5 A B C D E

Section 3 - Supervisor Performance Factors

Expand 6

Policy Knowledge

Leadership Ability

Description : Does the supervisor effectively motivate and engage his/her direct reports? Does the supervisor create an opportunity for direct reports to provide feedback on his/her work and operations? How well does this supervisor manage conflict?

In the space provided below, provide examples referencing essential job functions in support of the rating given.

7

Employee Rating 0.00

Employee Comments

8

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

Employee Comments

Comments

Created By: Template 12/20/2019 11:42AM

## Step 10 of 14 – Overall Summary tab

Select the **Overall Summary** tab.

## Step 11 of 14 – Calculator

Click on the calculator to calculate the total average rating.

## Step 12 of 14 – Comments

Enter **Employee Comments**.



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

10

Section 6 - Overall Summary

Employee Rating 3- Satisfactory 3.00 **11**

Employee Comments

Add additional comments **12**

### Step 13 of 14 – Save

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

### Step 14 of 14 – Complete

If you are done with your self- evaluation, click **Complete**.

UTRGV Performance Evaluation **13** **Save** **Complete** **14**

Print | Notify | Export

**Self-Evaluation - Update and Complete**  
John Doe

	Job Title Dir Human Resources	Manager Carl Davis
	Document Type UTRGV Performance Evaluation	Period 12/01/2019 - 12/01/2019
	Template Supervisor Evaluation: 2019	Document ID 1013
	Status Evaluation in Progress	Due Date 12/01/2019

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 | Manager Performance | Additional Questions | Development Plan | **Overall Summary**

**Complete Evaluation** x

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.

**Confirm** Cancel