Manager Self Service – Evaluation
ePerformance

Table of Contents

Overview 2
Step 1 of 17 – Manager Self Service 3
Step 2 of 17 – Team Performance Tile 3
Step 3 of 17 – My Current Documents 3
Step 4 of 17 – Verify 3
Step 5 of 17 – Performance 4
Step 6 of 17 – Expand 5
Step 7 of 17 – Ratings 6
Step 8 of 17 – Comments 6
Step 9 of 17 – Additional tabs 6
Step 10 of 17 – Overall Summary tab 7
Step 11 of 17 – Calculator 7
Step 12 of 17 – Comments 7
Step 13 of 17 –Attachments (As Needed Step) 8
Step 14 of 17 – Save 8
Step 15 of 17 – Submit for Approval 8
Step 16 of 17 – Next Level Supervisor 9
Step 17 of 17 – Confirm 9

Overview

The Manager Self Service appraisal process consists of ratings, providing feedback for each criteria, meeting with employee, and an overall summary when evaluating the employees work performance.

Manager Accesses PeopleSoft

Manager Completes Employee Evaluation

Manager Completes Overall Summary

- This section requires the Manager to rate the employee's **Quality of Work**, **Employee Performance**, **Compliance Questions**, **Supervisor Performance Factors** (if applicable) and **Development Plan**.

Manager Submits Evaluation for Approval

- Submission Generates Email to Next Level Supervisor

Manager Incorporates Feedback and Changes (if any)

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

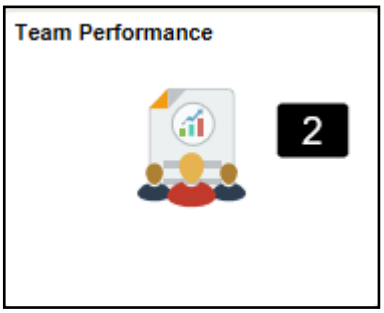
Evaluation available in 'Historical Documents'

Step 1 of 17 – Manager Self Service

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

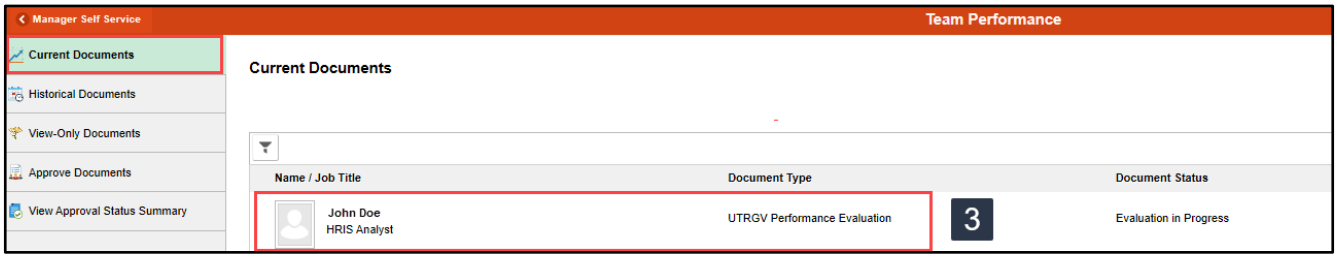
Step 2 of 17 – Team Performance Tile

Select the **Team Performance** tile.



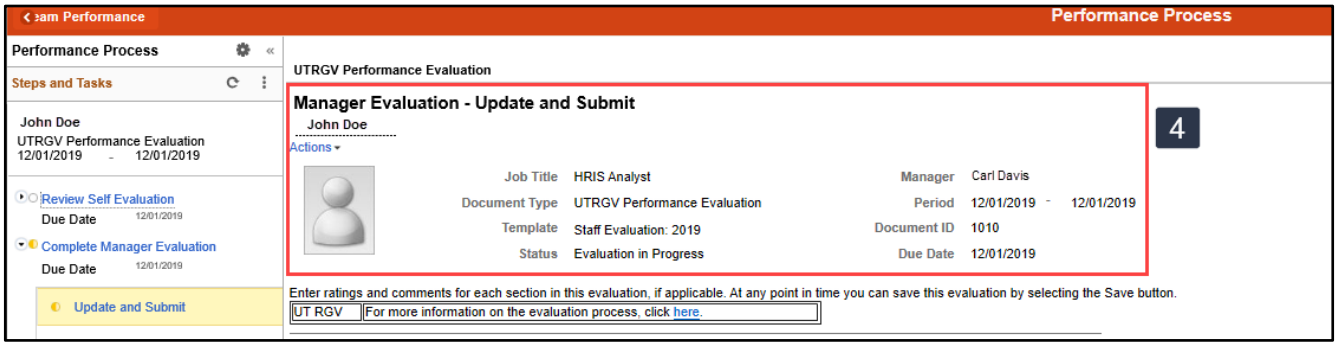
Step 3 of 17 – My Current Documents

A list of available **Current Documents** will appear. Select an employee to continue.



Step 4 of 17 – Verify

Be sure to verify employee information.

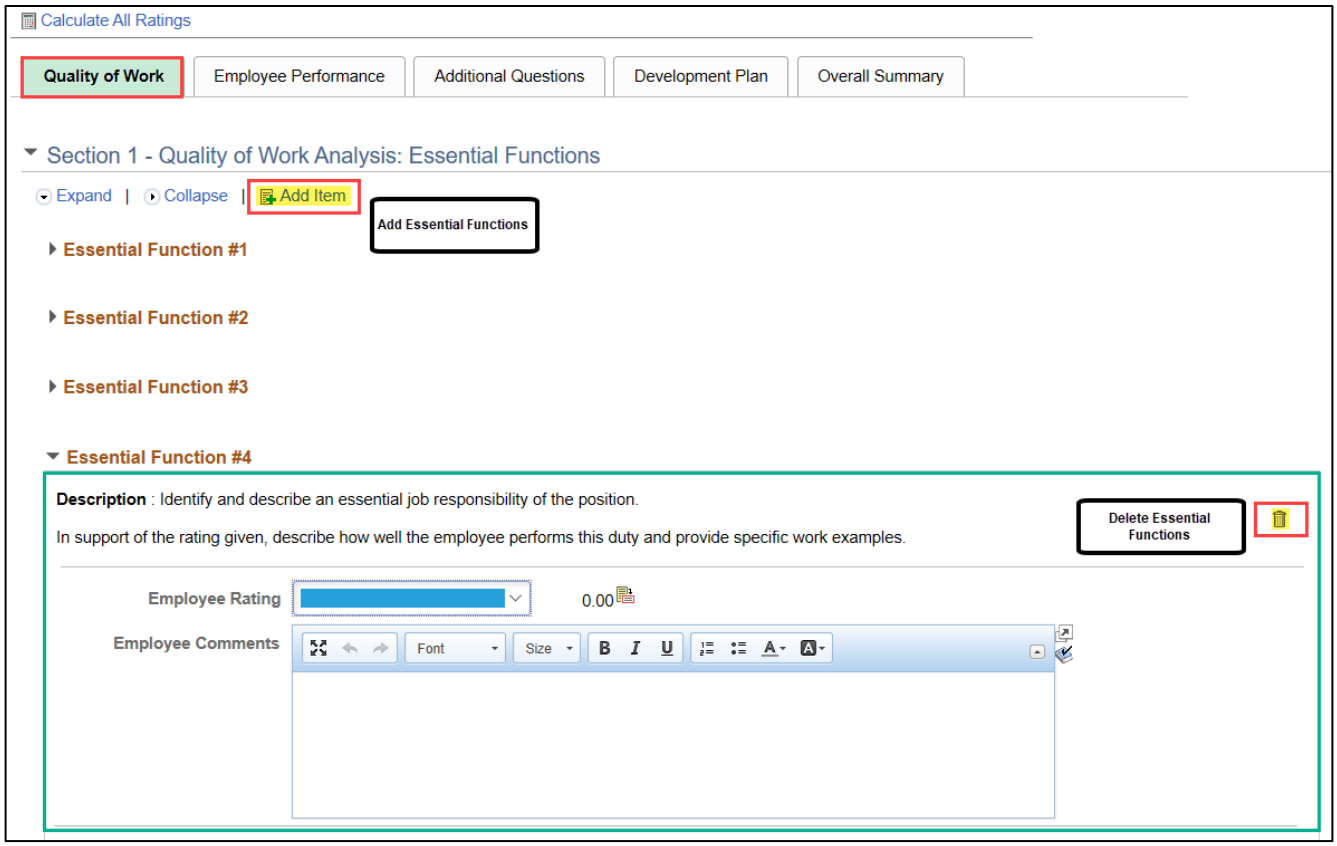


Step 5 of 17 – Performance

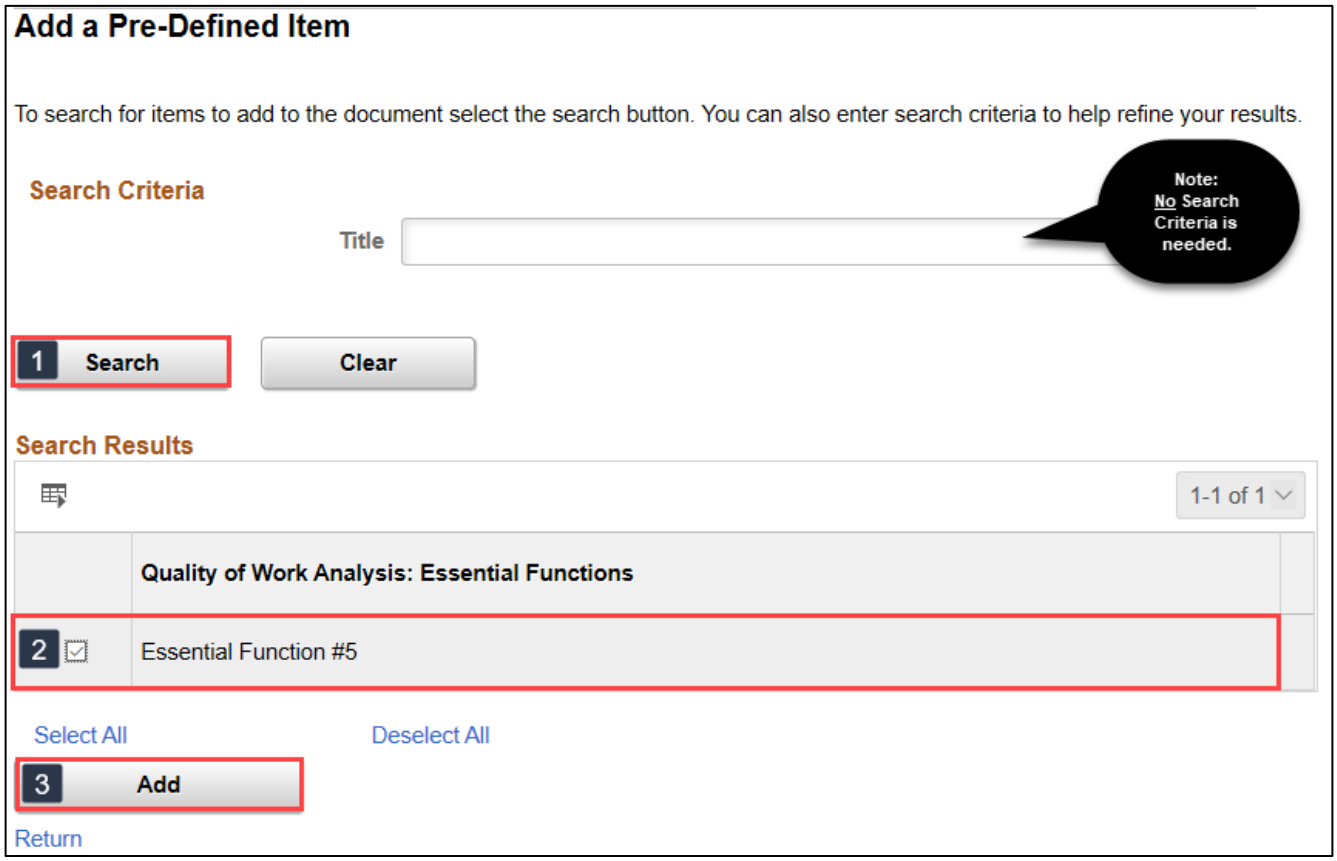
Select the **Quality of Work** tab.

Note: Essential Function #4 and #5 must 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.



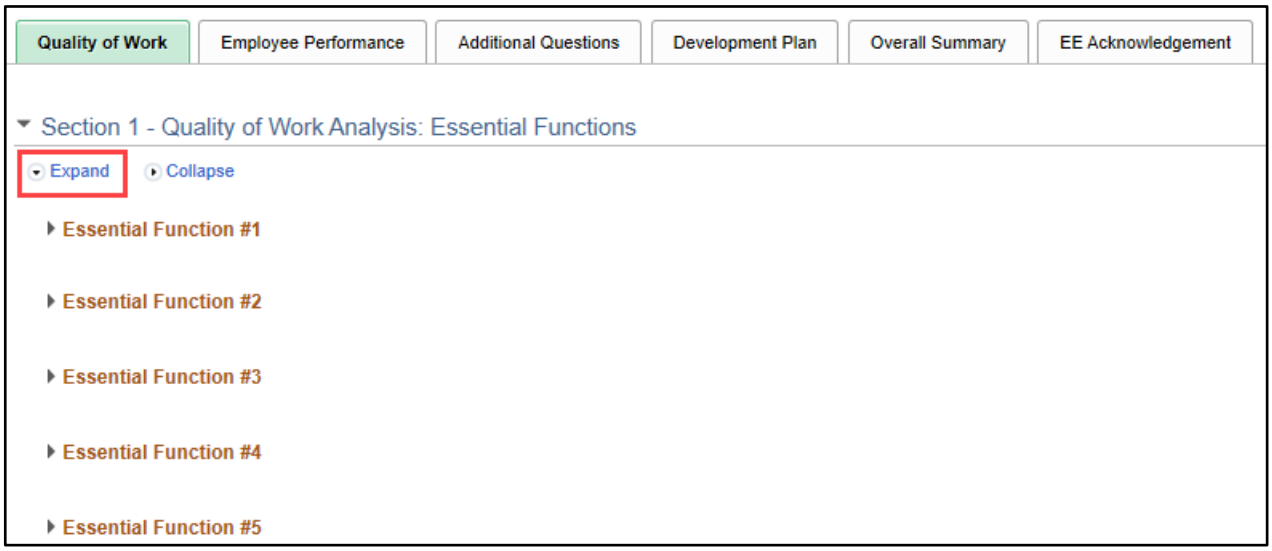
- When selecting the Add Item link, click **Search** and the available essential functions to add back will be displayed.
- Click **Add** and follow steps 7 and 8 to (Rate/Comment) the Essential Function just added.

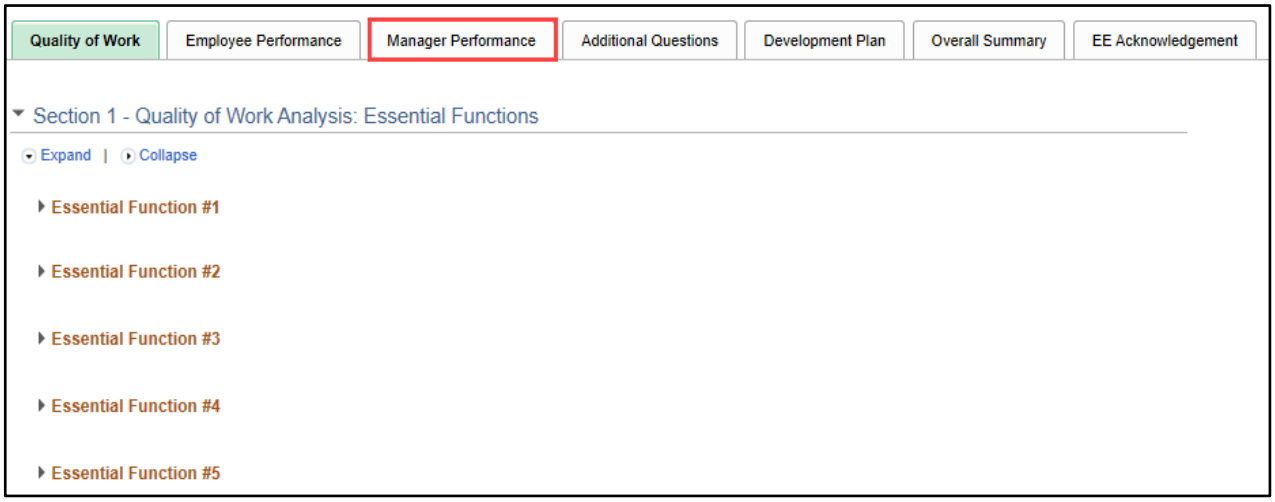


Step 6 of 17 – Expand

Expand to see all sections.

Note: Some employees may have additional tabs based on additional roles. For example, Supervisors include **Manager Performance** tab.

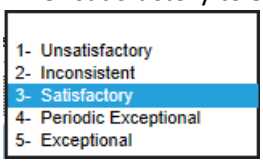




Step 7 of 17 – Ratings

Rate the employee on each.

1= Unsatisfactory to 5= Exceptional



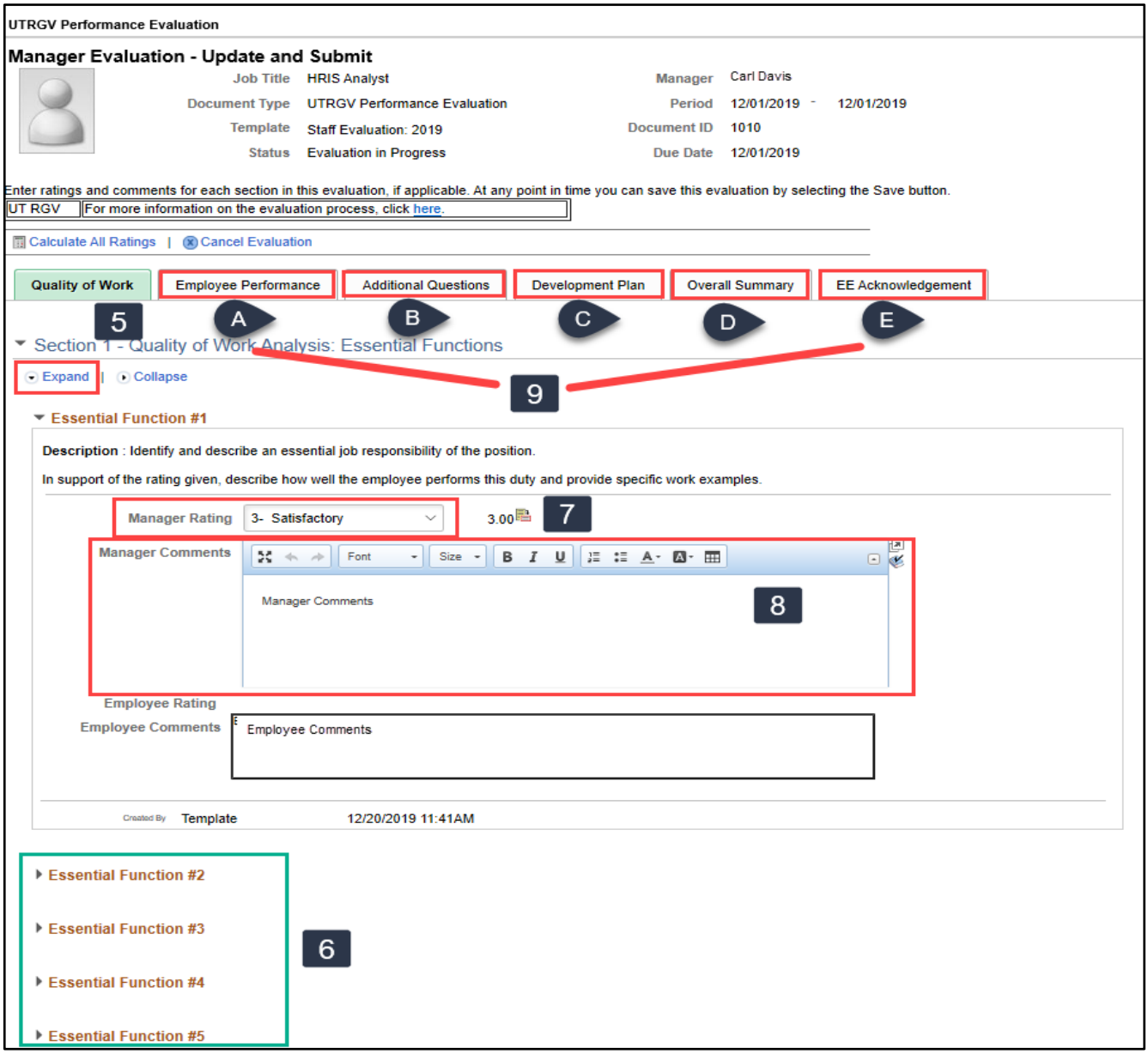
Step 8 of 17 – Comments

Use the comment box displayed under each goal to enter comments. If an employee completed the self-evaluation, you will see their comments displayed in the box below the **Manager Comments**.

Step 9 of 17 – Additional tabs

Repeat steps 6-8 for the following tabs:

a. **Employee Performance**
b. **Additional Questions**
c. **Development Plan**
d. **Overall Summary**
e. **EE Acknowledgement**



Step 10 of 17 – Overall Summary tab

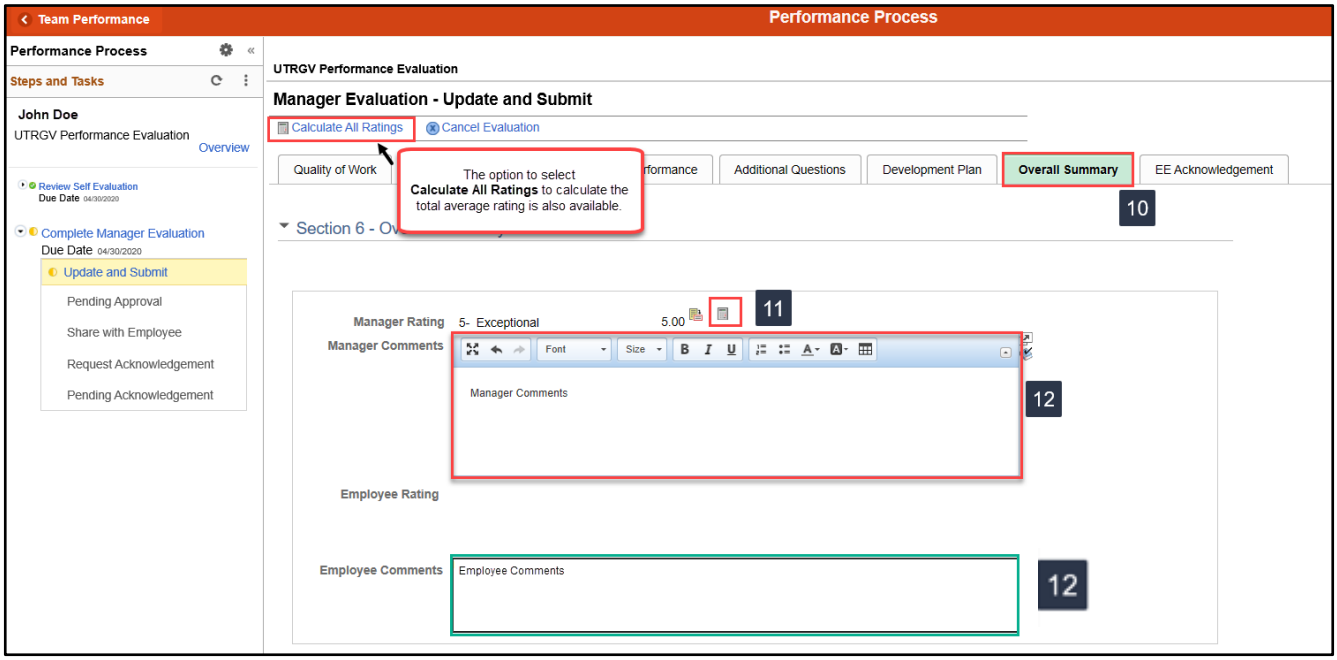
Select the **Overall Summary** tab.

Step 11 of 17 – Calculator

Use the calculator icon to calculate the overall average rating.

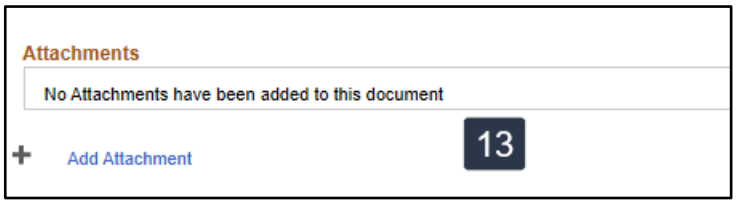
Step 12 of 17 – Comments

Add comment to the overall summary. If employee completed the self-evaluation, you will see their comments displayed in the box below.



Step 13 of 17 –Attachments (As Needed Step)

Add **Attachments**, if needed.

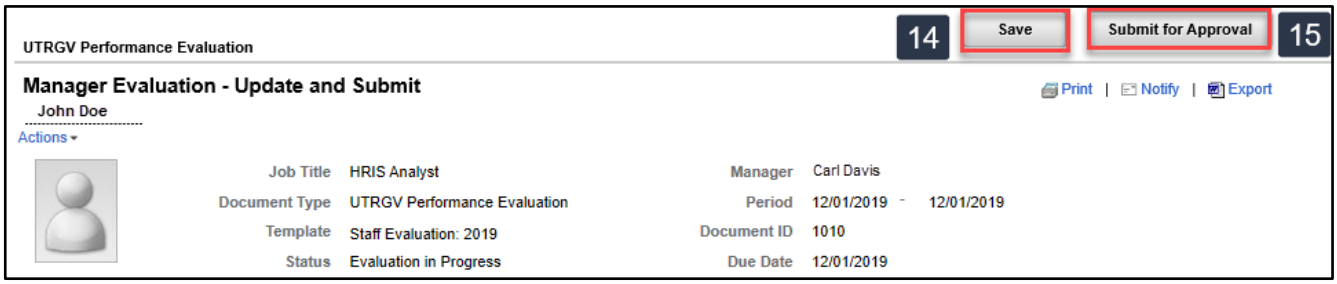


Step 14 of 17 – Save

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

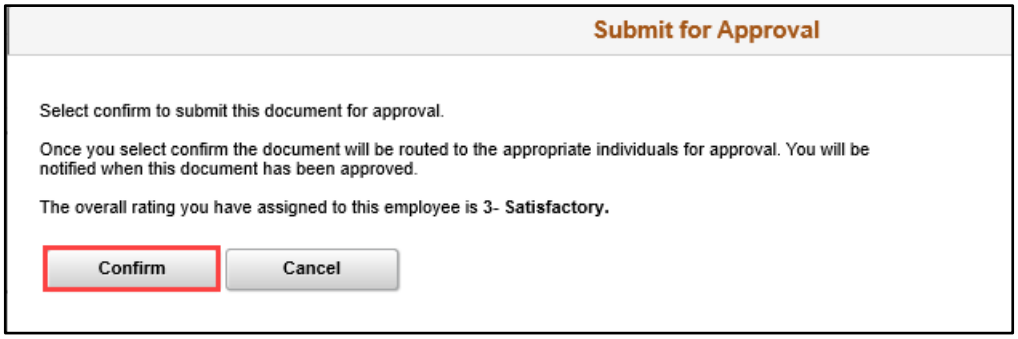
Step 15 of 17 – Submit for Approval

If you are done with the evaluation, click **Submit for Approval** to the Next Level Supervisor. Should you have multiple appointments continue with Steps 16 and 17; otherwise, you have completed this process.



Step 16 of 17 – Next Level Supervisor

Select the **Next Level Supervisor** which will be reviewing/ approving the evaluation.

Step 17 of 17 – Confirm

Then select **Confirm** to complete this process.