

Manager Self Service – Evaluation ePerformance

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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.







Step 1 of 17 – Manager Self Service

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

 Employee Self Ser 	vice
Employee Self Service	1
Manager Self Service	

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.

< Manager Self Service			Team Performance			
Current Documents	Current Documents	Current Documents				
Historical Documents	ments					
View-Only Documents		-				
	Ŧ					
Approve Documents	Name / Job Title	Document Type	Document Status			
biew Approval Status Summary	John Doe HRIS Analyst	UTRGV Performance Evaluation	3 Evaluation in Progress			

Step 4 of 17 – Verify

Be sure to verify employee information.

< sam Performance						F	erformanc	e Process
Performance Process	0 • «							
Steps and Tasks C	:	UTRGV Perfor	rmance Evaluation					
John Doe UTRGV Performance Evaluation 12/01/2019 - 12/01/2019		Manager E John Doe Actions +	Evaluation - Update and	d Submit				4
		0	Job Title	HRIS Analyst	Manager	Carl Davis		
CO Review Self Evaluation			Document Type	UTRGV Performance Evaluation	Period	12/01/2019 -	12/01/2019	
Due Date 12012019			Template	Staff Evaluation: 2019	Document ID	1010		
Complete Manager Evaluation Due Date 12/01/2019			Status	Evaluation in Progress	Due Date	12/01/2019		
Update and Submit		Enter ratings an UT RGV Fo	nd comments for each section in t or more information on the evalua	this evaluation, if applicable. At any poin ation process, click <u>here</u> .	t in time you can save this ev	aluation by selec	ting the Save b	utton.



Step 5 of 17 – Performance

Select the **Quality of Work** tab.

Note: Essential Function #4 and #5 <u>must</u> 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 <u>Add Item</u> link.

Quality of Work Employee Performance Additional Questions Development Plan Overall Summary
Section 1 - Quality of Work Analysis: Essential Functions
Expand O Collapse Add Item
Essential Function #1
Essential Function #2
► Essential Function #3
Essential Function #4
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 0.00
Employee Comments Font - Size - B I U := := A- A-

- When selecting the <u>Add Item</u> 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 Pr	re-Defined Item	
To search for	or items to add to the document select the search button. You can also enter search criteria to help refi	ne vour results.
Search Cr	criteria Title	Note: <u>No</u> Search Criteria is needed.
1 Searc	ch Clear	
Search Res	sults	
B		1-1 of 1 🖂
	Quality of Work Analysis: Essential Functions	
2 🗹	Essential Function #5	
Select All	Deselect All	
3 A Return	Add	

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.





Quality of Work	Employee Performance	Manager Performance	Additional Questions	Development Plan	Overall Summary	EE Acknowledgement	
 Section 1 - Qu 	ality of Work Analysis:	Essential Functions					
• Expand • Col	lapse						
Essential Fund	ction #1						
Essential Fund	ction #2						
Essential Fund	ction #3						
Essential Fund	ction #4						
Essential Fund	ction #5						

Step 7 of 17 – Ratings

Rate the employee on each.

1= Unsatisfactory to 5= Exceptional

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

Step 8 of 17 – Comments

Use the comment box displayed under each goal to enter comments. If an employee completed the selfevaluation, 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





UTRGV Performance Evaluation					
Manager Evaluation - Up	date and	Submit			
	Job Title	HRIS Analyst	Mana	ager Carl Davis	
Docur	nent Type	UTRGV Performance Evaluation	Pe	riod 12/01/2019	- 12/01/2019
	Template	Staff Evaluation: 2019	Documen	nt ID 1010	
	Status	Evaluation in Progress	Due [Date 12/01/2019	
Linter ratings and comments for each	n section in the	ion process, click here.	point in time you can save th	his evaluation by sel	ecting the Save button.
	and Evelvetia				
Calculate All Ratings Can	cei Evaluatio	n			
Quality of Work Employe	ee Performan	ce Additional Questions	Development Plan	Overall Summary	EE Acknowledgement
 Section 1 - Quality of W 	A /ork Analy	sis: Essential Functions		D	
• Expand Ocliapse					
			9		
 Essential Function #1 					
Description : Identify and des	cribe an esse	ential job responsibility of the positi	ion.		
In support of the rating given.	describe how	well the employee performs this d	luty and provide specific wor	k examples.	
				•	
Manager Ratin	g 3- Satisf	factory V 3.00	≞ _ / _		
Manager Comments	s 🔀 🔶	➢ Font - Size - B	IU 🗦 🗄 🔺 🛛	-	-
				_	-
	Manage	er Comments		8	
				_	
Employee Rating					
Employee Comments	E Employee	Comments			
Created By Templa	te	12/20/2019 11:41AM			
	_				
Essential Function #2					
Essential Function #3					
		6			
Essential Function #4	I '				
· Essentiar runcuoll #4					
Econotical Europtics #E					

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.





Team Performance	Performance Process
Performance Process 🔅 «	UTRGV Performance Evaluation
John Doe UTRGV Performance Evaluation Due Date consistent Due Date consistent Due Date consistent Due Date of complete Manager Evaluation Due Date of complete Manager Evaluation	Manager Evaluation - Update and Submit Calculate All Ratings Cancel Evaluation Quality of Work The option to select Calculate All Ratings to calculate the total average rating is also available. Tormance Additional Questions Development Plan Overall Summary EE Acknowledgement 10 10
Update and Submit Pending Approval Share with Employee Request Acknowledgement Pending Acknowledgement	Manager Rating 5- Exceptional 5.00 11 Manager Comments Manager Comments
	Employee Rating Employee Comments Imployee Comments 12

Step 13 of 17 – Attachments (As Needed Step)

Add Attachments, if needed.

А	ttachments	
	No Attachments have been added	o this document
+	Add Attachment	13

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.

UTRGV Performanc	e Evaluation			14	Save	Submit for Approval	15
Manager Evalu	ation - Update and	d Submit			🖨 Pr	rint 🖃 Notify 📾 Export	t
Actions +							
	Job Title	HRIS Analyst	Manager	Carl Davis			
3	Document Type	UTRGV Performance Evaluation	Period	12/01/2019 - 12/	/01/2019		
	Template	Staff Evaluation: 2019	Document ID	1010			
_	Status	Evaluation in Progress	Due Date	12/01/2019			





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.

	Submit for Approval	
Select confirm to submit this document for approval.		
Once you select confirm t notified when this docume	the document will be routed to the appropriate individuals for approval. You will be ent has been approved.	
The overall rating you have	ve assigned to this employee is 3- Satisfactory.	
Confirm	Cancel	

