THE UNIVERSITY of TEXAS SYSTEM
FOURTEEN INSTITUTIONS. UNLIMITED POSSIBILITIES.
Office of Shared Information Services

Manager Self Service – Evaluation
ePerformance

Table of Contents

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	• 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 Completes Overall Summary	
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

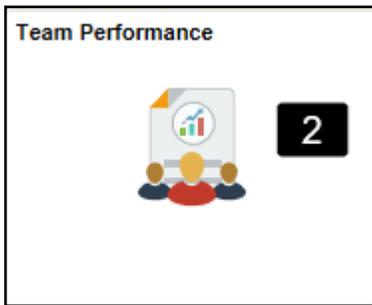**Evaluation available in 'Historical Documents'**

Step 1 of 17 – Manager Self Service

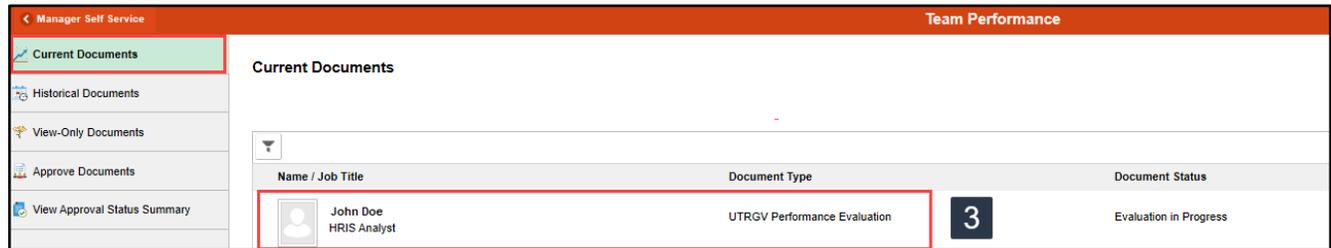Select the **Manager Self Service** option from the dropdown in the PeopleSoft homepage.

Step 2 of 17 – Team Performance Tile
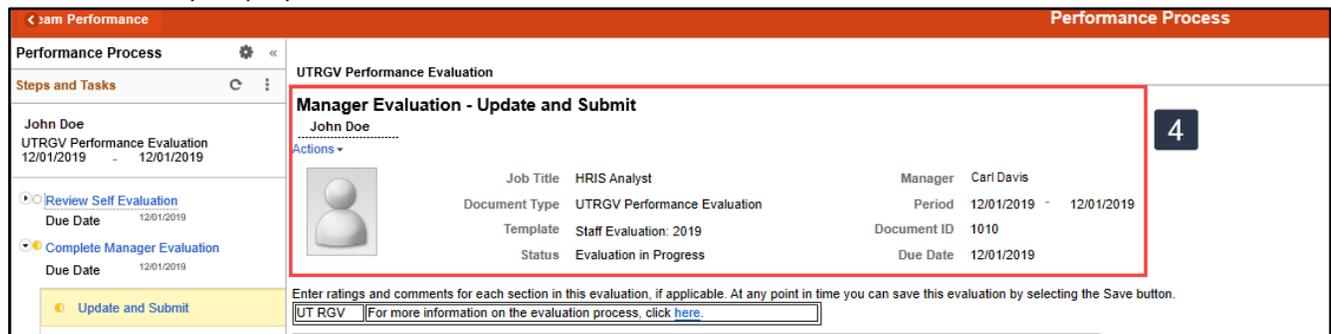
Select the **Team Performance** tile.

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 <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.

- 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.

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 - Quality of Work Analysis: Essential Functions

⊙ Expand | ⊙ Collapse

▸ Essential Function #1

▸ Essential Function #2

▸ Essential Function #3

▸ Essential Function #4

▸ Essential Function #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 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**

UTRGV Performance Evaluation

Manager Evaluation - Update and Submit

Job Title	HRIS Analyst
Document Type	UTRGV Performance Evaluation
Template	Staff Evaluation: 2019
Status	Evaluation in Progress

Manager	Carl Davis
Period	12/01/2019 - 12/01/2019
Document ID	1010
Due Date	12/01/2019

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.

UT RGV — For more information on the evaluation process, click here.

Calculate All Ratings | Cancel Evaluation

Tabs: **Quality of Work** | Employee Performance | Additional Questions | Development Plan | Overall Summary | EE Acknowledgement

▼ Section 1 - 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 well the employee performs this duty and provide specific work examples.

Manager Rating   3- Satisfactory   3.00

Manager Comments

Manager Comments

Employee Rating
Employee Comments   Employee Comments

Created By   Template   12/20/2019 11:41AM

▸ Essential Function #2

▸ Essential Function #3

▸ Essential Function #4

▸ Essential Function #5

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.

Submit for Approval

Select confirm to submit this document for approval.

Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.

The overall rating you have assigned to this employee is 3- **Satisfactory.**

Confirm   Cancel