



Next Level Supervisor- Approve/Deny

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Overview

Once Managers have completed the employee appraisal, the Next Level Supervisor will review the document and can approve or deny the document. Denying the document will simply send it back for modification.

Manager Submits Evaluation for Next Level Approval

Next Level Supervisor Accesses
PeopleSoft

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

Next Level Supervisor Reviews
Evaluation

Approves or Denies Evaluation
(for modification)

- Submission Generates Email to Manager

Next Level Supervisor Process
Completed

Evaluation available in 'Historical Documents'



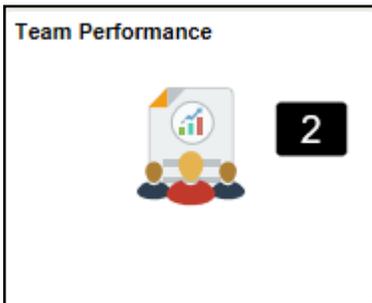
Step 1 of 9 – Manager Self Service

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



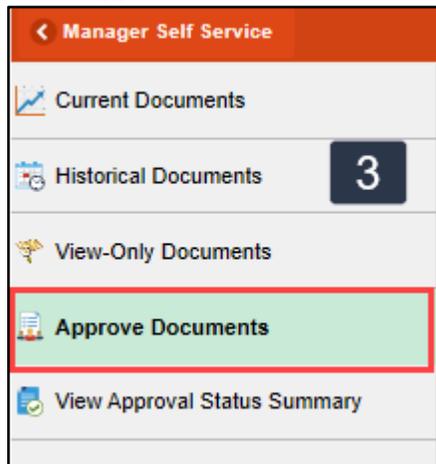
Step 2 of 9 – Team Performance Tile

Select the **Team Performance** tile.



Step 3 of 9 – Approve Documents

Select **Approve Documents** from the navigation collection.





Step 4 of 9 – Approve Documents

A list of available employee documents submitted will appear. Click on employee’s name to continue.

Select Transaction to Approve

The following hyperlinks indicate employees which require your participation in an approval process. Select on a hyperlink to see details about what needs to be approved for each employee

▶ Filter Criteria

Performance Document

Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type
John Doe	12/01/2019	12/01/2019	Approval	Submitted	Carl Davis	UTRGV Performance Evaluation

Step 5 of 9 – View Performance Detail

The **Performance Summary** will display the overall rating for the employee. Select the **View Performance Detail** link to review the evaluation.

John Smith
Dir Human Resources

Performance Summary

Document Type UTRGV Performance Evaluation

Period Begin Date 12/01/19

Rating 3- Satisfactory

Approver Comments

Approval Chain >

Approve Deny

Manager Carl Davis

Period End Date 12/01/19

View Performance Detail 5



Step 6 of 9 – View Performance Detail

Under the “Quality of Work” tab, click **Expand** to review all.

Review **Manager Comments & Criteria Rating** under the summary section. The employee comments will appear in the **Employee Comments** box displayed below.

The screenshot displays the 'Quality of Work' tab selected in a navigation bar. Below the tabs, a section titled 'Section 1 - Quality of Work Analysis: Essential Functions' is expanded, showing a rating of 6. Under 'Essential Function #1', the description is: '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.' The 'Manager Rating' is 3- Satisfactory (3.00) and the 'Employee Rating' is 3- Satisfactory. Both have associated comment boxes. At the bottom, a metadata section shows: Created By: Template, Last Modified By: Carl Davis, 12/20/2019 11:42AM, 02/04/2020 2:21PM.

Step 7 of 9 – Comments

Repeat step 6 for the following tabs:

- a. **Employee Performance**
- b. **Manager Performance (Supervisor Evaluations)**
- c. **Additional Questions**
- d. **Development Plan**
- e. **Overall Summary**
- f. **EE Acknowledgement**



UTRGV Performance Evaluation

Manager Evaluation - Pending Approval

John Smith

Actions



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	Approval - Submitted	Due Date	12/01/2019

- Quality of Work
- Employee Performance
- Manager Performance
- Additional Questions
- Development Plan
- Overall Summary
- EE Acknowledgement

7

A

B

C

D

E

F

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

Employee Rating 3- Satisfactory

Employee Comments

Created By Template 12/20/2019 11:42AM
 Last Modified By 02/04/2020 2:21PM

- ▶ Essential Function #2
- ▶ Essential Function #3
- ▶ Essential Function #4
- ▶ Essential Function #5

Quality of Work Analysis: Essential Functions Summary



Step 8 of 9 – Approval

Once the evaluation has been reviewed, select the **Approval** button on the top left of the screen to return to the approval screen.

Approval ← Manager Evaluation - Pending Approval

UTRGV Performance Evaluation 8

Manager Evaluation - Pending Approval

John Smith
Dir Human Resources

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: Approval - Submitted Due Date: 12/01/2019

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

Step 9 of 9 – Submit

You have the option to **Approve** the document or **Deny** to send back for modification.

Note: Comments are required if you are sending back the document. Comments are only seen by manager not employee.

Click **Submit** to complete this process.

Team Performance Performance

John Smith
Dir Human Resources

9 Approve Deny

Performance Summary

Document Type: UTRGV Performance Evaluation Manager: Carl Davis
Period Begin Date: 12/01/19 Period End Date: 12/01/19
Rating: 3- Satisfactory [View Performance Detail](#)

Approver Comments

Approval Chain >

Cancel Approve Submit

You are about to approve this request.

Approver Comments