

The Guide for Managers and Employee (One on One)

Manager- Share with Employee

- To complete the evaluation process, the evaluation should be shared with the employee and a meeting should be scheduled to discuss.
- Discuss upcoming goals for 2023- managers should discuss goals and expectations for the coming calendar year.
- Request acknowledgement- this step asks the employee to provide comments and acknowledge that the evaluation has been reviewed.

Why is the performance review important?

- An open, honest, frequent dialogue helps build trust among employees, managers, and the organization at large.
- Ongoing performance conversations can help managers understand the obstacles and decisions before it impacts performance.
- Opens opportunities to discuss feedback, celebrate recognition, and reinforce alignment to the department's goals.

How to prepare for a performance review?

- Sync performance review, employee goals and goals progress- employees should understand what constitutes good and bad performance. Measure impact, define success, ensure that performance plans are working, and define the next steps.
- Gather employee data and examples- previous performance conversations, notes from 1-1 meetings, examples of recognition, etc.
- Prepare notes and agenda- both parties should work together to prepare a shared agenda and notes with key talking points.

Conducting the Performance Review?

- Reflect on the past but focus on the future- performance conversations should give employees the opportunity to address and correct performance in real-time and continuously see how their work aligns with the organizational goals.
- Discuss upcoming goals for 2023- managers should discuss goals and expectations for the coming calendar year.
- Request acknowledgement- this step will ask the employee to provide comments and acknowledge the evaluation has been reviewed.



Manager - Sharing with Employee



1. From the PeopleSoft homepage, select the **Manager Self Service** option from the dropdown.
2. Select the **Team Performance** tile.
3. A list of available **Current documents** will appear. Select the employee with document status of **Approved**.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Jorge Lopez Program Coordinator/ Manager	UTEP Performance Evaluation	Approval - Approved	01/11 12/31	03/30
John Smith Post Doctoral	UTEP Performance Evaluation	Define Criteria	01/11 12/31	03/31

Performance Process

UTEP Performance Evaluation

Manager Evaluation - Share with Employee

Jorge Lopez

Job Title: Program Coordinator/ Manager
Document Type: UTEP Performance Evaluation
Template: UTEP Staff Evaluation
Status: Approval - Approved

Manager: Luis Perez
Period: 01/11 - 12/31
Document ID: 3750
Due Date: 03/30

Goal Setting | Quality of Work | Productivity | Reliability | Teamwork | Strengths/Challenges | Overall Summary | Employee Comments

Section 1 - UTEP Goal Setting and Development Planning

At the beginning of each year, managers provided 3-5 goals for employees aligned with University vision/mission. Provide comments and discuss the employee's progress towards achieving these goals.

Expand | Collapse

1. Contribute novel Ideas and Strategies

Share with Employee

Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.

Confirm Cancel

4. Select **Share with Employee**.
5. Select **Confirm**. This will send an email to the employee and allow him/her employee to review the evaluation.

Manager - Sharing with Employee

After sharing with employee, the manager will schedule a one on one session with the employee to discuss the evaluation. This step is outside of PeopleSoft.

The screenshot shows the 'Performance Process' interface for 'Jorge Lopez'. The 'Steps and Tasks' sidebar on the left has 'Request Acknowledgement' highlighted. The main content area is titled 'Manager Evaluation - Request Acknowledgement' and includes a table with the following data:

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11 - 12/31
Template	UTEP Staff Evaluation	Document ID	3750
Status	Shared with Employee	Due Date	03/30

Below the table, there is a 'Reopen' button and a 'Request Acknowledgement' button. A red box with the number '6' highlights the 'Request Acknowledgement' button.

6. After the one on one session, click on **Request Acknowledgement**.
7. Select **Confirm**. This will notify the employee that s/he can now add comments and acknowledge they have read and discussed the document with you.

Request Acknowledgement

Select confirm to send a request to the employee asking them to acknowledge that they have read and discussed this document with you.

Confirm

Cancel

- If the employee is unavailable or refuses to acknowledge follow steps 8– 10. Otherwise, wait for the employee to acknowledge and continue to step 11.
8. Select **Override Acknowledgement** only if the employee is unavailable or refuses to acknowledge the evaluation.

The screenshot shows the 'Performance Process' interface for 'Jorge Lopez'. The 'Steps and Tasks' sidebar on the left has 'Request Acknowledgement' highlighted. The main content area is titled 'Manager Evaluation - Request Acknowledgement' and includes a table with the following data:

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11 - 12/31
Template	UTEP Staff Evaluation	Document ID	3750
Status	Pending Acknowledgement	Due Date	03/30

Below the table, there is a 'Reopen' button and an 'Override Acknowledgement' button. A red box with the number '8' highlights the 'Override Acknowledgement' button.

Manager - Sharing with Employee

Override Employee Acknowledgement

You have chosen to override your employee's acknowledgement of this document. Please indicate the reason for doing so.

- Employee Not Available
- Employee Refused

Select confirm to move the document to the next status.

Confirm

Cancel

9. Choose a **reason** for overriding Acknowledgement.
10. Select **Confirm**.

After the evaluation has been acknowledged, the performance document will show the option to **Complete** on the top right corner, this will finalize the evaluation process.

Performance Process

UTEP Performance Evaluation

Manager Evaluation - Complete

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11 - 12/31
Template	UTEP Staff Evaluation	Document ID	3750
Status	Acknowledged	Due Date	03/30

Employee has acknowledged the performance evaluation. Please click the "Complete" button to finalize the evaluation.

Complete

Complete Evaluation

You have almost finalized this document. If you have no further entries select confirm to complete this document.

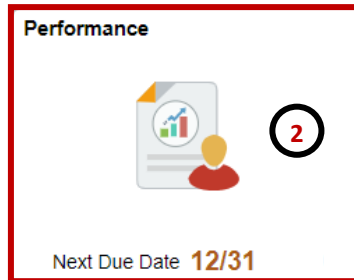
Confirm

Cancel

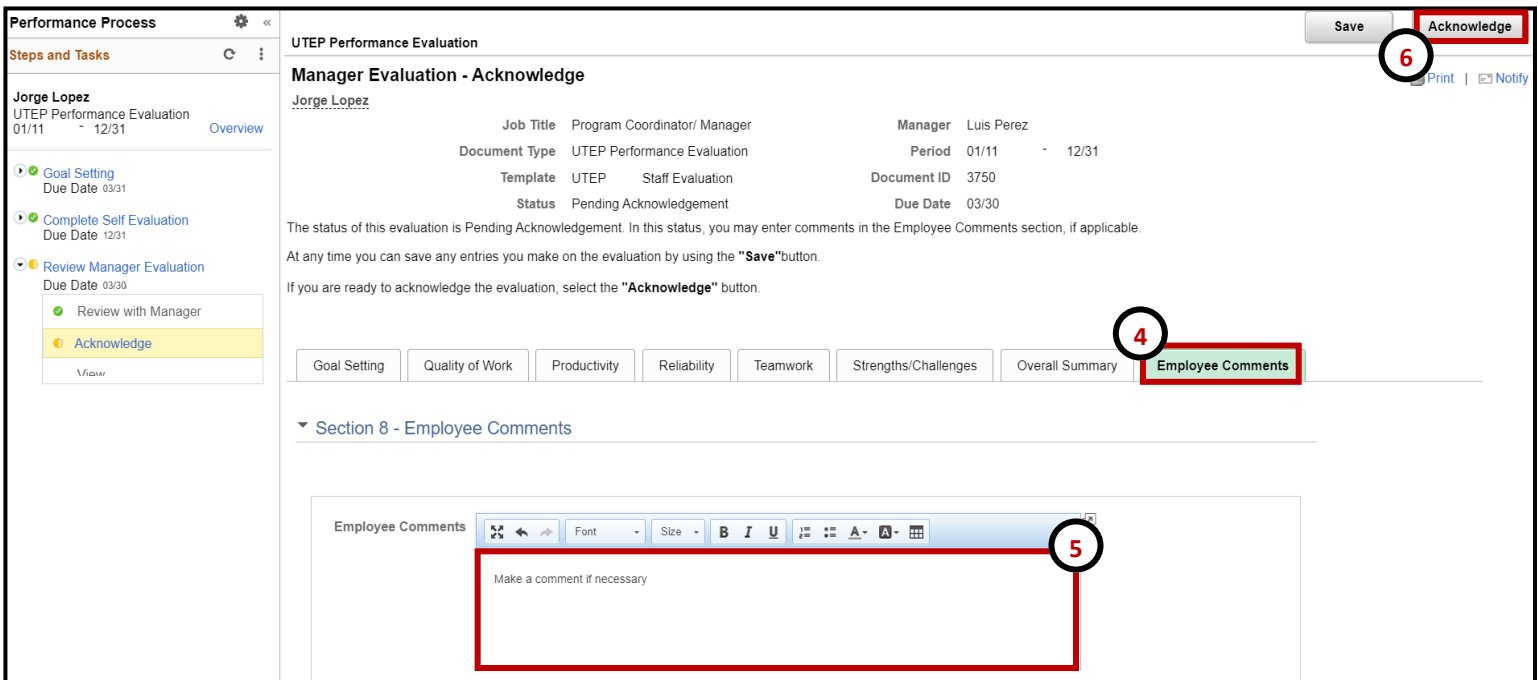
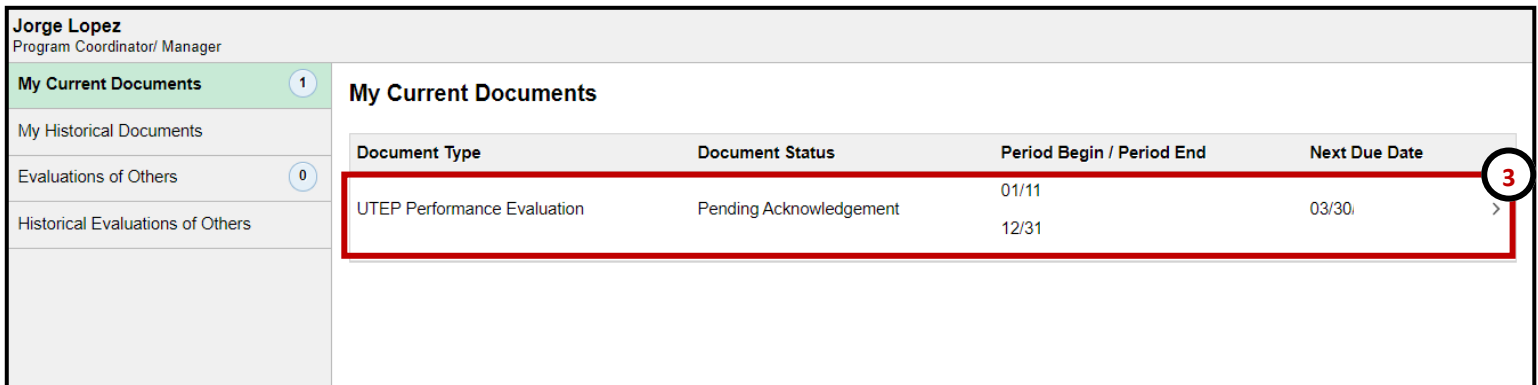
11. From the top right corner select **Complete**.
12. Select **Confirm** to finalize the evaluation process.

Remember to constantly save your work, PeopleSoft will automatically time out due to inactivity and this may cause you to lose unsaved work.

Employee - Acknowledge Evaluation



1. From the PeopleSoft homepage, select the **Employee Self Service** option from the dropdown.
2. Select the **Performance** tile.
3. From the **My Current Documents** page, select the document which shows a status of **Pending Acknowl-**



Acknowledge Review Held

You have chosen to acknowledge that you and your manager have reviewed this document.

Confirm

Cancel

4. Go to the **Employee Comments** tab.
5. Add **employee comments** (optional).
6. From the top right corner, click **Acknowledge**.
7. Select **Confirm** to complete this process.