

# A Guide for Managers- Complete Evaluation

2022 Employee Evaluation- The evaluation process consists of rating competencies, providing feedback for each criterion, and an overall summary when evaluating the employee's performance.

- Managers may proceed with the 2022 evaluation while the self-evaluation is being completed.
- Evaluate the 2022 goals- review and evaluate if goals were met for this period.
- Rate Competencies-ensure that each competency is reviewed thoroughly, and ratings are assigned appropriately (see below).
- Provide an overall summary under each criteria.
- Identify employee's strengths and weaknesses.
- Provide an overall summary for the evaluation.
- Submit the employee evaluation. Once submitted, it will route to the Next Level Supervisor for review and approval.
- Manager should monitor the evaluation during this time to ensure that workflow is not delayed.
- Next Level Supervisor Approves/Disapproves evaluation. If disapproved, managers may reopen and update as needed.

## Proficiencies

Rating	Numeric Rating	Description
Unsatisfactory	1.00	Performance was below expectations in all essential areas of responsibility, and/or reasonable progress toward critical goals was not made.
Needs Improvement	2.00	Performance did not consistently meet expectations. Performance failed to meet expectations in one or more essential areas of responsibility, and/or one or more of the most critical goals were not met.
Meets Expectations	3.00	Performance consistently met expectations in all essential areas of responsibility, and the quality of work overall was very good. The most critical annual goals were met.
Exceed Expectations	4.00	Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met.
Exceptional	5.00	Performance far exceeded expectations due to exceptionally high quality of work performed in all areas of responsibility resulting in an overall quality of work that was superior, or the employee made an exceptional or unique contribution in support of unit, department, or university objectives.

# Manager – Evaluation Process



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 an employee to continue.

**Current Documents** 2 rows

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
<b>Jorge Lopez</b> Program Coordinator/ Manager	UTEP Performance Evaluation	Evaluation in Progress	01/1 12/3	03/31
<b>John Smith</b> Post Doctoral	UTEP Performance Evaluation	Define Criteria	01/1 12/3	03/3

**Performance Process**

Steps and Tasks

**Jorge Lopez**  
UTEP Performance Evaluation  
01/11 - 12/31

Overview

- Goal Setting  
Due Date: 03/31
- Review Self Evaluation  
Due Date: 12/31

**UTEP Performance Evaluation**

**Manager Evaluation - Update and Submit**

**Jorge Lopez**  
Actions

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/1 - 12/3
Template	Clone_Staff Evaluation	Document ID	3750
Status	Evaluation in Progress	Due Date	03/3

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

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 on the employee's progress towards achieving these goals.

Expand | Collapse

**1. Contribute novel Ideas and Strategies**

**Description:** Continue to take initiative in providing input, and developing novel strategies and ideas for the center.

**Measurement:** Assessment of whether or not employee contributed original and creative ideas to the work of the center.

Due Date:

**Manager Comments**

Employee contributed this information throughout the year.

**Employee Comments**

Employee completed this goal and contributed to the development of the center in the past year.

4. Verify employee information.
  5. Under the "Goal Setting" tab, click **Expand** to make adjustments.
  6. Use the comment box displayed under each goal to enter comments.
- If employee completed the self evaluation, you will see their comments displayed in the box below.

# Manager – Evaluation Process

7

Quality of Work

a

b

c

Productivity

Reliability

Teamwork

Strengths/Challenges

Overall Summary

Employee Comments

Section 2 - UTEP Performance Criteria - Quality of Work

Sections 2 through 5 - Assign ratings.

13

Quality of Work is a criterion defining the quality of the employee's job performance. Identifying the areas associated to the employee's competencies which means the employee produces work related to the job requirements.

8

Expand

Collapse

Add Item

9

Knowledge

Description: Knowledgeable in duties and terminology associated to job functions. Uses resources to increase knowledge and proactively shares knowledge with others.

1. Unsatisfactory

2. Needs Improvement

3. Meets Expectations

4. Exceeds Expectations

5. Exceptional

Manager Rating 4. Exceeds Expectations 4.00

Employee Rating 4. Exceeds Expectations

Created By: Template 11/08 3:47PM

Last Modified By: Luis Perez 11/15 10:52AM

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Responsiveness

Accountability

Customer Services

Accuracy

Commitment

Safety

UTEP Performance Criteria - Quality of Work Summary

1. Unsatisfactory

2. Needs Improvement

3. Meets Expectations

4. Exceeds Expectations

5. Exceptional

Manager Rating 4. Exceeds Expectations 4.00

Comments

Employee's quality of work exceeds expectations.

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Employee Rating 4. Exceeds Expectations

Employee Comments

My quality of work has been above average, I have exceeded expectations in my job.

7. Select the **Quality of Work** tab.
8. Click **Expand** to see all competencies.
9. Rate the employee on each competency.  
The rating scale goes from:  
1=Unsatisfactory to 5= Exceptional
10. Rate the remaining competencies. If the employee completed the self evaluation you will see the rating under **Manager Rating**.
11. Then, use the **calculator** icon to calculate the average rating for this criteria.
12. Enter **comments**.  
If employee completed the self evaluation, you will see their comments displayed in the box below.
13. Repeat steps 8-12 for the following tabs:
  - a. **Productivity**
  - b. **Reliability**
  - c. **Teamwork**

# Manager – Evaluation Process

The screenshot shows the 'Strengths/Challenges' tab selected in the top navigation bar. Below the navigation bar, the 'Section 6 - UTEP Performance Strengths and Challenges' is expanded. A red box highlights the 'Expand' button, with a callout '15' indicating the action. The main content area is titled 'What are the employee's strengths?' and contains a rich text editor. The text 'Employee manages their time well and provides great customer service.' is entered, with a red box around it and a callout '16' indicating the action. Below the text editor, the question 'What aspects of the work performance need to be improved?' is visible.

14. Select the **Strengths/Challenges** tab.

15. Click on **Expand**.

16. **Add comments** for each inquiry under Strengths and Challenges.

The screenshot shows the 'Overall Summary' tab selected in the top navigation bar. Below the navigation bar, the 'Section 7 - Overall Summary' is expanded. A red box highlights the 'Overall Summary' tab, with a callout '17' indicating the action. The main content area shows the 'Manager Rating' as '4. Exceeds Expectations' with a '4.00' score and a calculator icon, with a callout '18' indicating the action. Below the rating, the 'Comments' field contains the text 'Overall the employee has shown great initiative and is very reliable.', with a red box around it and a callout '19' indicating the action. The 'Employee Rating' is also '4. Exceeds Expectations'. Below the rating, the 'Employee Comments' field contains the text 'My overall performance meets job expectations, I have also taken additional tasks outside of regular job duties.', with a green box around it. At the bottom, the 'Attachments' section shows 'No Attachments have been added to this document' and an 'Add Attachment' button, with a red box around it and a callout '20' indicating the action.

17. Select the **Overall Summary** tab.

18. Use the **calculator** icon to calculate to the overall average rating.

19. **Add comments** to the overall summary.

If employee completed the self evaluation, you will see their comments displayed in the box below.

20. Add **Attachments**, if needed.

# Manager – Evaluation Process

UTEP Performance Evaluation

**Save** **Submit for Approval**

## Manager Evaluation - Update and Submit

Jorge Lopez

Actions ▾

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11/ - 12/31/

21. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.
22. Select **Complete** to submit the evaluation to the Next Level Supervisor.  
*If you have multiple appointments continue to steps 23-24; otherwise, you have completed this process.*

### Submit for Approval

You have chosen to submit this performance evaluation for approval. To confirm that you would like the evaluation for approval, select the Submit button.

Do not submit this evaluation until you have completed each section. Once you select Submit, the evaluation will be routed through the approval process to the appropriate individuals. You will then be notified by email on the approval status.

PLEASE NOTE: If you hold multiple positions, choose the position that relates to the manager role you are evaluating the employee.

The overall rating you have assigned to this employee is **4. Exceeds Expectations**.

#### Data

	Job Title	Department	Supervisor Name	Company
<input type="radio"/>	Professor	Biological Sciences	Emmett Brown	University of Texas, El Paso
<input checked="" type="radio"/>	Director	Ctr for Faculty Leader & Devel	Marty McFly	University of Texas, El Paso

**Confirm** **Cancel**

23. Select the **Next Level Supervisor** which will be reviewing/approving the evaluation.
24. Then select **Confirm** to complete this process.

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