

# A Guide for Managers- Goal Setting Stage

## Goal Setting

- Setting goals is the first step in completing an employee evaluation. Each year, you will set goals for the upcoming year/evaluation period.
- Creating goals is important to manage your employee's performance.
- During this phase, managers convey the expectations of the position/department to employees.
- Goals should be specific, measurable, attainable/aligned, realistic/relevant, and time bound (S.M.A.R.T.)
- Goals should be strategic in nature and not daily tasks.

## How to Write S.M.A.R.T. Goals?

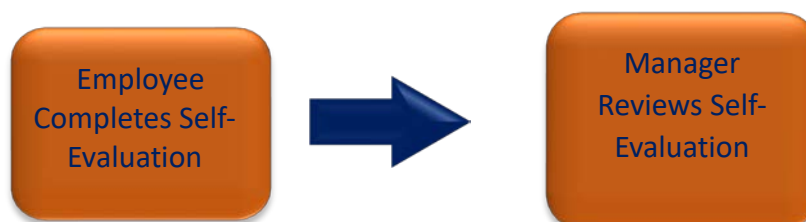
- Designed in a way to foster clear and mutual understanding of what constitutes expected levels of performance and successful professional development.

<b>S</b>	<b>Specific</b>	What will be accomplished? What actions will you take?
<b>M</b>	<b>Measurable</b>	What data will measure the goal? How much?
<b>A</b>	<b>Achievable</b>	Is the goal doable? Do you have the necessary skills?
<b>R</b>	<b>Relevant</b>	How does the goal align with broader goals? Why is the result important?
<b>T</b>	<b>Time Bound</b>	What is the time frame for accomplishing the goal?

## Update/Define Competencies

- You can add/modify competencies within each criterion.
- Competencies are characteristics used to evaluate the employee's job performance.
- If you have created specific competencies for another employee or in prior year evaluations, you have an option of copying these competencies.

**\*Once submitted, goals and competencies cannot be modified. Once finalized, this will enable the 2022 evaluation to become available.**



# Manager - Add Goals

1. From the PeopleSoft homepage, select the **Manager Self Service** option from the dropdown.

2. Select the **Team Performance** tile.

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 **Performance Documents** will appear. Select an employee to continue.

3. A list of available **Performance Documents** will appear. Select an employee to continue.

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

4. Verify the employee information.

5. From the "Goal Setting" tab, click on **Expand** to make adjustments:

**Note:** The "Pencil" icon allows you to modify goals and "Trash" icon allows you to delete goals.

6. In this example, we will add goals by selecting the **Pencil** icon.

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
 2. Make any necessary adjustments to the criteria and review your changes with the employee.  
 3. Once the performance criteria is correct select the submit button to complete this step.

Created By: Template      11/08      3:47PM

# Manager - Add Goals

UTEP Performance Evaluation  
Edit Item

**\*Title** 1. Insert goal here.

**Description**

Insert description here.

**Measurement**

Insert measurement here.

Due Date 08/31 example 12/31

7. Complete applicable goal setting fields: **Title, Description, Measurement, and Due Date.**

8. Click **Update** to save goal information.

*Repeat steps 5-9 to add more goals.*

9

UTEP Performance Evaluation

Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11
Template	Clone_Staff Evaluation	Document ID	3750
Status	In Progress	Due Date	03/31

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
2. Make any necessary adjustments to the criteria and review your changes with the employee.  
3. Once the performance criteria is correct select the submit button to complete this step.

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

9      10

9. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.

10. After adding goals you can also add/remove competencies, use one of the following guides to edit/copy competencies:

*Manager- Add Pre-defined Competencies*

*Manager- Copy Competencies*

If no changes are needed, select **Submit** 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.**

# Manager - Add Pre-defined Competencies



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 **Performance Documents** will appear. Select an employee to continue.

Performance Documents

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

3

Performance Process

Steps and Tasks

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

Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title: Program Coordinator/ Manager  
Document Type: UTEP Performance Evaluation  
Template: Clone\_Staff Evaluation  
Status: In Progress

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

4

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
2. Make any necessary adjustments to the criteria and review your changes.  
3. Once the performance criteria is correct select the submit button to save.

5

Quality of Work

6

7

8

9

6a

5. Verify employee information.

6. Select the **Quality of Work** tab.

7. Click on **Expand** to make adjustments:

- a. Use the **"Trash"** icon to delete any undesired competencies.

8. Add competencies by selecting the **Add Item** link.

You have three options when adding competencies, in this example we will **Add pre-defined item**:

8. Choose the **Add pre-defined item** option.
9. Click **Next**.

**Note:** You can also add your own competencies by selecting **Add your own item**.

# Manager - Add Pre-defined Competencies

UTEP Performance Evaluation

## Add a Pre-Defined Item

To search for items to add to the document select the search button. You can also enter search criteria to help refine your results.

**Search Criteria**

Title

**10**

**Search Results**

UTEP Performance Criteria - Quality of Work	
<input checked="" type="checkbox"/>	Responsiveness
<input type="checkbox"/>	Customer Services <b>11</b>
<input type="checkbox"/>	Accuracy
<input type="checkbox"/>	Safety

**12**

[Return](#)

10. Click the **Search** button to display competencies

11. Under the “UTEP Performance Criteria - Quality of Work” section, use the **check box** to select the competencies you want to copy. **Note:** You can also use the **Select All** hyperlink.

12. Click the **Add** button and you will then be redirected to the UTEP Performance Evaluation page.

13. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.

14. Repeat steps 6-13 for the following tabs:

- Productivity
- Reliability
- Teamwork

15. After adding all desired competencies, select **Submit** to complete this process.

UTEP Performance Evaluation

## Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title	Program Coordinator/ Manager
Document Type	UTEP Performance Evaluation
Template	Clone_Staff Evaluation
Status	In Progress

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.  
 2. Make any necessary adjustments to the criteria and review your changes with the employee.  
 3. Once the performance criteria is correct select the submit button to complete this step.

**14a** **14b** **14c**

**13**   **15**

[Print](#) | [Notify](#)

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

# Manager - Copy Competencies

1. From the PeopleSoft homepage, select the **Manager Self Service** option from the dropdown.

2. Select the **Team Performance** tile.

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 **Performance Documents** will appear. Select an employee to continue.

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

4. Verify employee information.

5. Select the **Quality of Work** tab.

6. Click on the **Expand** to make adjustments:

- a. Use the **Trash** icon to delete any undesired competencies.

7. Add competencies by selecting the **Add Item** link.

8. Choose the **Copy Item from My Team's Documents** option.

9. Click **Next**.

6a. You have three options when adding competencies, in this example we will **Copy Item from My Team's Documents**.

8. Choose the **Copy Item from My Team's Documents** option.
9. Click **Next**.

# Manager - Copy Competencies

UTEP Performance Evaluation

### Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

▼ Filter Criteria

First Name  Last Name  11

Document Type

Period Between  -

10 12

### Performance Documents

Select	Name	Document Type	Document Status	Period Begin	Period End
<input type="checkbox"/> <span>13</span>	Jorge Lopez	UTEP Performance Evaluation	Completed	01/01	12/31

10. From the "Select a Document" screen, click the **Clear** button to begin.
11. Then, enter the **First Name** and **Last Name** in the respective fields.
12. Click the **Filter** button to display Performance Documents.
13. **Select** the document to copy.

### Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select save your entry.

**Copy from Document**

Name   
Section   
Begin Date

**UTEP Performance Criteria - Quality of Work to be copied**

	UTEP Performance Criteria - Quality of Work
<input type="checkbox"/>	Responsiveness
<input type="checkbox"/> <span>14</span>	Customer Services
<input type="checkbox"/>	Accuracy

15

14. Under the "UTEP Performance Criteria - Quality of Work" section, use the **check box** to select the competencies you want to copy. **Note:** You can also use the **Select All** hyperlink.
15. Click the **Copy** button and you will then be redirected back to the "UTEP Performance Evaluation" page where you will see the copied competencies.

16. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.
17. Select **Submit** to complete this process.

UTEP Performance Evaluation

### Define Criteria - Update and Submit

Jorge Lopez  
Actions

Job Title   
Document Type  Period  -

16 17

Print | Notify

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

# Manager - Copy Goals

1 **Employee Self Service** dropdown menu

- Employee Self Service
- Manager Self Service**
- Analytics & Reporting

2 **Team Performance** tile

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 **Performance Documents** will appear. Select an employee to continue.

3 **Performance Documents** table

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

**Performance Process**

**Steps and Tasks**

- Jorge Lopez UTEP Performance Evaluation 01/11 - 12/31 Overview
- Goal Setting** Due Date 03/31
  - Update and Submit**
  - Review Self Evaluation Due Date 12/31
  - Complete Manager Evaluation Due Date 03/30

**UTEP Performance Evaluation**

**Define Criteria - Update and Submit**

4 **Jorge Lopez** Actions

Job Title: Program Coordinator/ Manager  
 Document Type: UTEP Performance Evaluation  
 Template: Clone\_Staff Evaluation  
 Status: In Progress

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

1. Review the performance criteria (goals and/or responsibilities)
2. Make any necessary adjustments to the criteria and review your work
3. Once the performance criteria is correct select the submit button

5 **Expand** | 6 **Add Item**

7 **Add Item** dialog box

- Add your own Item
- Copy Item from My Team's Documents**

8 **Next** button

Note: The "Pencil" icon allows you to modify goals and "Trash" icon allows you to delete goals.



# Manager - Copy Goals

UTEP Performance Evaluation

## Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

▼ Filter Criteria

First Name  Last Name  10

Document Type

Period Between  -

9

11

### Performance Documents

Select	Name	Document Type	Document Status	Period Begin	Period End
<input type="checkbox"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">12</span>	Jorge Lopez	UTEP Performance Evaluation	Completed	01/01	12/31

9. From the "Select a Document" screen click the **Clear** button to begin.
10. Then, enter the **First Name** and **Last Name** in the respective fields.
11. Click on the **Filter** button to display Performance Documents.
12. **Select** the document to copy.

Performance Document

## Copy Item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, save your entry.

Copy from Document

Name Jorge Lopez  
Section UTEP Goal Setting and Development Planning  
Begin Date 01/01

### UTEP Goal Setting and Development Planning to be copied

	UTEP Goal Setting and Development Planning
<input type="checkbox"/>	1. Contribute novel Ideas and Strategies <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">13</span>
<input type="checkbox"/>	2. Program Evaluation
<input type="checkbox"/>	3. Promotion and marketing of the Faculty Lounge
<input type="checkbox"/>	4. New Faculty Onboarding

14

13. Under the "UTEP Goal Setting and Development Planning to be copied" section, use the **check box** to select the goals you want to copy.  
*Note: You can also use the [Select All](#) hyperlink.*
14. Click the **Copy** button and you will then be redirected back TO the "UTEP Performance Evaluation" page where you will see the copied goals.
15. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.
16. After adding goals you can also add/remove competencies, use one of the following guides to edit/copy competencies:  
*Manager- Add Pre-defined Competencies*  
*Manager- Copy Competencies*  
If no changes are needed, select **Submit** to complete this process.

UTEP Performance Evaluation

## Define Criteria - Update and Submit

Jorge Lopez  
Actions

15 16

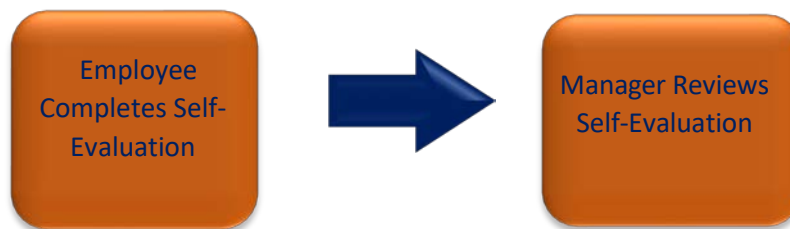
Print | Notify

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

# A Guide for Employee Self-Evaluation

## Self-Evaluation (optional)

- Self-Evaluation will be initiated once goals and competencies are updated and submitted.
- The employee self-evaluation allows an employee to complete self-assessment on his/her job performance, including details on ability to meet goals and performance factors.
- Evaluate the goals and rate competencies set by the manager.
- Provide an overall evaluation summary.



# Employee - Self Evaluation

The Employee Self Evaluation allows an employee to provide feedback on his/her job performance. This step is optional and managers do not have to wait for the employee to complete the self evaluation.

1. From the PeopleSoft homepage, select the **Employee Self Service** option from the dropdown.

2. Select the **Performance** tile.

Next Due Date **12/31**

1. From the PeopleSoft homepage, select the **Employee Self Service** option from the dropdown.
2. Select the **Performance** tile.
3. Your **Performance Documents** will appear. Select UTEP Performance Evaluation.

If your evaluation does not appear, touch base with your supervisor to confirm if goals have been set-up or to determine if s/he has already started the evaluation.

**Jorge Lopez**  
Program Coordinator/ Manager

**My Current Documents**

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTEP Performance Evaluation	Evaluation in Progress	01/11 12/31	12/31

3

**Performance Process**

**UTEP Performance Evaluation**

**Self-Evaluation - Update and Complete**

**Jorge Lopez**

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11 - 12/31
Template	Clone_Staff Evaluation	Document ID	3750
Status	Evaluation in Progress	Due Date	12/31

4

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Calculate All Ratings

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

Section 1 - UTEP Goal Setting and Development

5

1. Contribute novel Ideas and Strategies

Description: Continue to take initiative in providing input...

Measurement: Assessment of whether or not employee...

Due Date:

Employee Comments

6

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

Created By: Luis Perez 11/14 10:59AM  
Last Modified By: Jorge Lopez 11/14 11:10AM

4. Verify employee information.
5. From the "Goal Setting" tab, click **Expand** to review goals.
6. Use the **comment box** displayed under each the goal to enter employee comments.

# Employee - Self Evaluation

UTEP Performance Evaluation

## Self-Evaluation - Update and Complete

Jorge Lopez

Job Title: Program Coordinator/ Manager  
Document Type: UTEP Performance Evaluation  
Template: Clone\_Staff Evaluation  
Status: Evaluation in Progress

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

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

Calculate All Ratings

7 **Quality of Work** **a** Productivity **b** Reliability **c** Teamwork Strengths/Challenges Overall Summary

13

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

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

Employee Rating 4. Exceeds Expectations 4.00

Created By: Template 11/08 3:47PM  
Last Modified By: Jorge Lopez 11/14 11:12AM

10 Responsiveness  
Accountability  
Customer Services  
Accuracy  
Commitment  
Safety

11

Employee Rating 4. Exceeds Expectations 4.00

Comments

12

Add additional comments

7. Select the **Quality of Work** tab.  
8. Click **Expand** to see all competencies.  
9. Rate yourself on each competency.  
The rating scale goes from:  
1=Unsatisfactory to 5= Exceptional

10. Rate yourself for the remaining competencies.  
11. Then, use the **calculator** icon to calculate the average rating for this criteria.  
12. Enter **comments**.  
13. Repeat steps 9-13 for the following tabs:  
**a. Productivity**  
**b. Reliability**  
**c. Teamwork**

# Employee - Self Evaluation

**Performance Process**

**Steps and Tasks**

Jorge Lopez  
UTEP Performance Evaluation  
01/11 - 12/31 [Overview](#)

- Goal Setting  
Due Date 03/31
- Complete Self Evaluation  
Due Date 12/31
  - Update and Complete
- Review Manager Evaluation  
Due Date 03/30

**UTEP Performance Evaluation**

**Self-Evaluation - Update and Complete**

Jorge Lopez

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11 - 12/31
Template	Clone_Staff Evaluation	Document ID	3750
Status	Evaluation in Progress	Due Date	12/31

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Calculate All Ratings](#)

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

Section 7 - Overall Summary

Employee Rating 4. Exceeds Expectations 4.00

Comments

Add overall summary comments

14. Select the **Overall Summary** tab.
15. Use the **calculator** icon to calculate the total average rating for all competencies.
16. Enter overall **comments**.
17. Select **Save** to keep your changes, you can always return to the document if you need more time and are not ready to submit.
18. Select **Complete** to submit your evaluation.

**UTEP Performance Evaluation**

**Performance Process**

**Steps and Tasks**

Jorge Lopez  
UTEP Performance Evaluation  
01/11 - 12/31 [Overview](#)

- Goal Setting  
Due Date 03/31
- Complete Self Evaluation  
Due Date 12/31
  - Update and Complete
- Review Manager Evaluation  
Due Date 03/30

**UTEP Performance Evaluation**

**Self-Evaluation - Update and Complete**

Jorge Lopez

Job Title	Program Coordinator/ Manager	Manager	Luis Perez
Document Type	UTEP Performance Evaluation	Period	01/11 - 12/31
Template	Clone_Staff Evaluation	Document ID	3750
Status	Evaluation in Progress	Due Date	12/31

Enter ratings and comments for each section where applicable. To save changes made to the evaluation select the Save button. When finished updating the evaluation, select the Complete button to make the document available to your manager.

[Calculate All Ratings](#)

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

**Save** **Complete**

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

# 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

Employee Self Service

- Employee Self Service
- Manager Self Service**
- Analytics & Reporting

Team Performance

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

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

Productivity

Reliability

Teamwork

Strengths/Challenges

Overall Summary

Employee Comments

Section 2 - UTEP Performance Criteria - Quality of Work

Sections 2 through 5 - Assign ratings.

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.

Expand | Collapse | Add Item

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

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.

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' section is expanded. A red box highlights the 'Expand' button. A text area for 'Manager Comments' contains the text 'Employee manages their time well and provides great customer service.' A red box highlights this text area. Below the text area, a 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' section is expanded. A red box highlights the 'Overall Summary' tab. A 'Manager Rating' of 4.00 is shown. A red box highlights the 'Comments' text area containing the text 'Overall the employee has shown great initiative and is very reliable.' Below this, an 'Employee Rating' of 4.00 is shown. A green box highlights the 'Employee Comments' text area containing the text 'My overall performance meets job expectations, I have also taken additional tasks outside of regular job duties.' At the bottom, a red box highlights the 'Attachments' section, which shows 'No Attachments have been added to this document' and an 'Add Attachment' button.

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**.

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

### 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

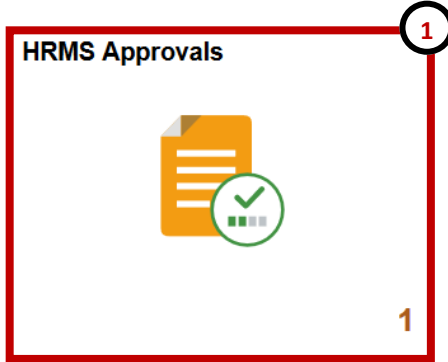
**Confirm**

Cancel

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

# Next Level Supervisor - Approve/Deny

After the Manager has completed the evaluation, 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.



1. Log into PeopleSoft, from the Employee Self Service home page select the **HRMS Approvals** tile.
2. Under “Pending Approvals” select the **Performance** transaction type for the respective employee.

A screenshot of the 'Pending Approvals' interface. The top bar shows 'My Approvals' and 'Pending Approvals'. Below is a 'View By' dropdown set to 'Type'. A table lists approval types: 'All' (1) and 'Performance' (1). A table below shows a row for 'Performance' for 'Jorge Lopez' with a rating of '3. Meets Expectations' and a 'Routed' status of '03/02'. A circled '2' is over the 'Performance' row.

View By	Type	Count
All	All	1
Performance	Performance	1

All	1 row		
<b>Performance</b>	3. Meets Expectations	Routed	>
Jorge Lopez	01/11 To 12/31	03/02	

A screenshot of the 'Performance Summary' for 'Jorge Lopez, Program Coordinator/ Manager'. It shows document details: 'Document Type: UTEP Performance Evaluation', 'Manager: Luis Perez', 'Period Begin Date: 01/11', and 'Period End Date: 12/31'. The 'Rating' is '4. Exceeds Expectations'. A 'View Performance Detail' link is circled with a '3'. 'Approve' and 'Deny' buttons are on the right.

Jorge Lopez  
Program Coordinator/ Manager

Approve Deny

**Performance Summary**

Document Type UTEP Performance Evaluation Manager Luis Perez

Period Begin Date 01/11 Period End Date 12/31

Rating 4. Exceeds Expectations View Performance Detail

3. You will then see the Performance Summary and rating for the employee. Use the **View Performance Detail** link to review the evaluation.

A screenshot of the 'Goal Setting' section. The 'Expand' button is circled with a '4'. The goal description is '1. Contribute novel Ideas and Strategies'. The 'Manager Comments' field contains 'Employee contributed this information throughout the year.' The 'Employee Comments' field contains 'I completed this goal and contributed to the development of the center in the past year.'

Goal Setting Quality of Work Productivity Reliability Teamwork Strength

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 discuss the employee's progress towards achieving these goals.

Expand

**1. Contribute novel Ideas and Strategies**

Description : Continue to take initiative in providing input, and developing novel strategies and ideas for the continued development of 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 I completed this goal and contributed to the development of the center in the past year.

4. Under the “Goal Setting” tab, click **Expand** to review goals and comments added by the manager. If employee completed the self evaluation, you will see their comments displayed in the box below.

# Next Level Supervisor - Approve/Deny

5

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.

• 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.

Expand Collapse

6

▼ 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

7

▼ UTEP Performance Criteria - Quality of Work Summary

1. Unsatisfactory 2. Needs Improvement 3. Meets Expectations

Manager Rating 4. Exceeds Expectations 4.00

Comments Employee's quality of work exceeds expectations.

Employee Rating 4. Exceeds Expectations

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

5. Select the **Quality of Work** tab.

6. Click **Expand** to see all competencies and ratings.

If employee completed the self evaluation, you will see the **Employee Rating** displayed under the **Manager Rating**.

7. Review **Manager Comments & Criteria Rating** under the summary section.

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

8. Repeat steps 5-7 for the following tabs:

a. **Productivity**

b. **Reliability**

c. **Teamwork**

Goal Setting

Quality of Work

Productivity

Reliability

Teamwork

Strengths/Challenges

Overall Summary

Employee Comments

9

▼ Section 6 - UTEP Performance Strengths and Challenges

Section 6 identifies employee's **STRENGTH** and **CHALLENGES** during the evaluation period.

Expand Collapse

10

▼ What are the employee's strengths?

Manager Comments Employee manages their time well and provides great customer service.

9. Go to the **Strengths/Challenges** tab.

10. Click the **Expand** link and review each inquiry under **Strengths and Challenges**.

# Next Level Supervisor - Approve/Deny

**My Approvals** Manager Evaluation - Pending Approval

UTEP Performance Evaluation

**Manager Evaluation - Pending Approval**

Jorge Lopez  
Actions ▾

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

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

Jorge Lopez  
Program Coordinator/ Manager

**Approve** **Deny**

**Performance Summary**

Document Type	UTEP Performance Evaluation	Manager	Luis Perez
Period Begin Date	01/11	Period End Date	12/31
Rating	4. Exceeds Expectations	<a href="#">View Performance Detail</a>	

Approver Comments

**Approve** **Deny** **Submit**

You are about to approve this request.

Approver Comments

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

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

13. Click **Submit** to complete this process.

# 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  
UTEP Performance Evaluation  
01/11, 12/31

Actions

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	Approval - Approved	Due Date	03/30

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.

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.