Agenda

1. **What is e-Performance? Definition, importance, and designated roles**

2. **Manager Self Service vs. Employee Self Service views**

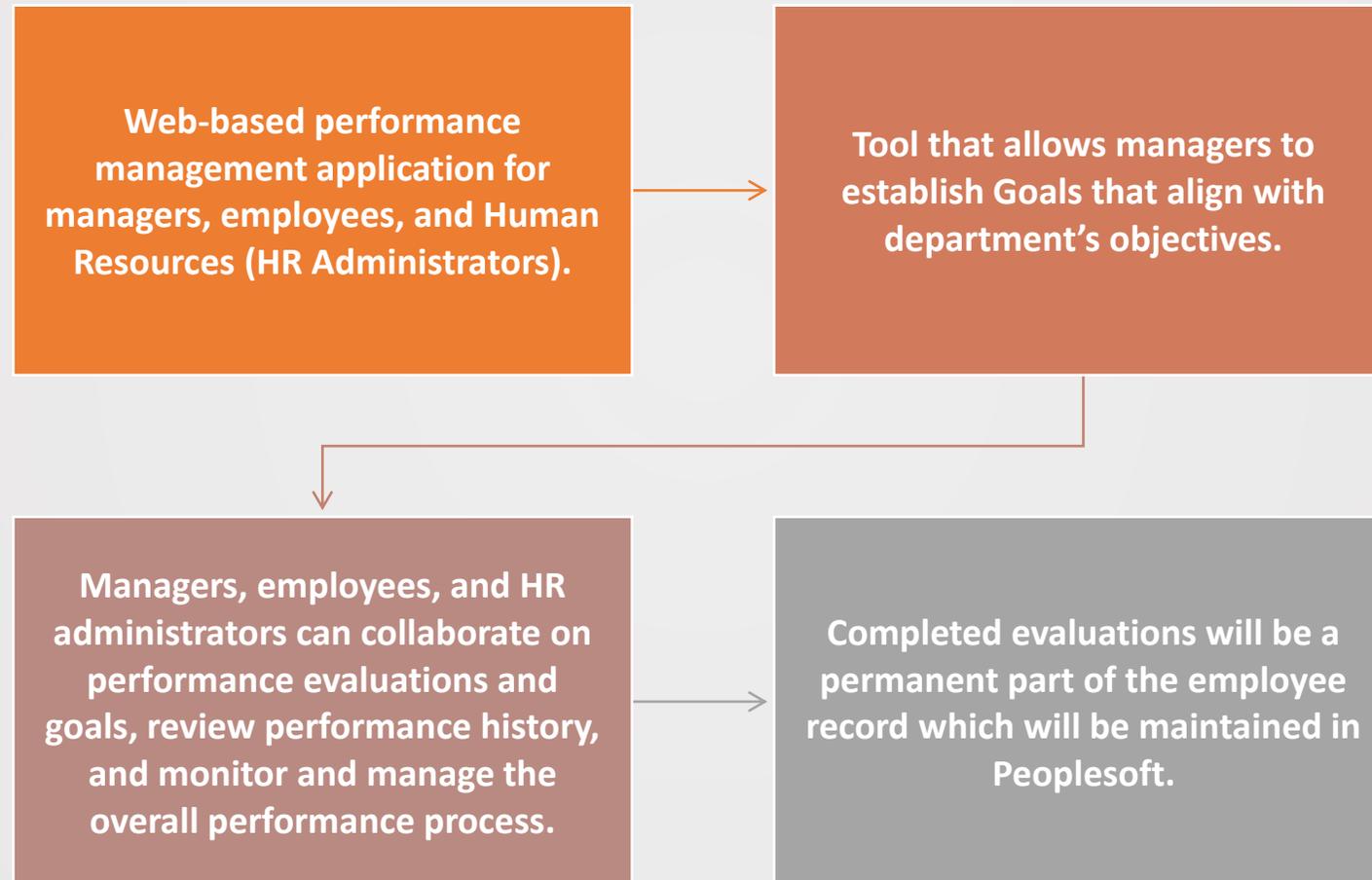3. **Evaluation Performance Process Steps**

4. **Demonstration**

What is ePerformance?

Web-based performance management application for managers, employees, and Human Resources (HR Administrators).

Tool that allows managers to establish Goals that align with department's objectives.

Managers, employees, and HR administrators can collaborate on performance evaluations and goals, review performance history, and monitor and manage the overall performance process.

Completed evaluations will be a permanent part of the employee record which will be maintained in Peoplesoft.

Why complete a Performance Evaluation?

It is the policy of The University of Texas at El Paso (UTEP) to evaluate the job performance of all Faculty, Classified Staff and Administrative and Professional (A&P) Staff on an annual basis.

Provide feedback, recognize quality performance and set expectations for future job performance.

Highlights the training needs of your team.

Measures accountability and areas of improvement.

Justification in merit increases.

Ongoing performance discussions can assist in avoiding serious problems in the future.

Evaluating the performance of our employees is a requirement established by the Rules and Regulations of the Board of Regents: Rule 30501: Employee Evaluations

PERFORMANCE EVALUATION PERIOD: JANUARY 1, 2024-DECEMBER 31, 2024

DUE DATE: MARCH 31, 2025

Performance Evaluation Roles

Employee

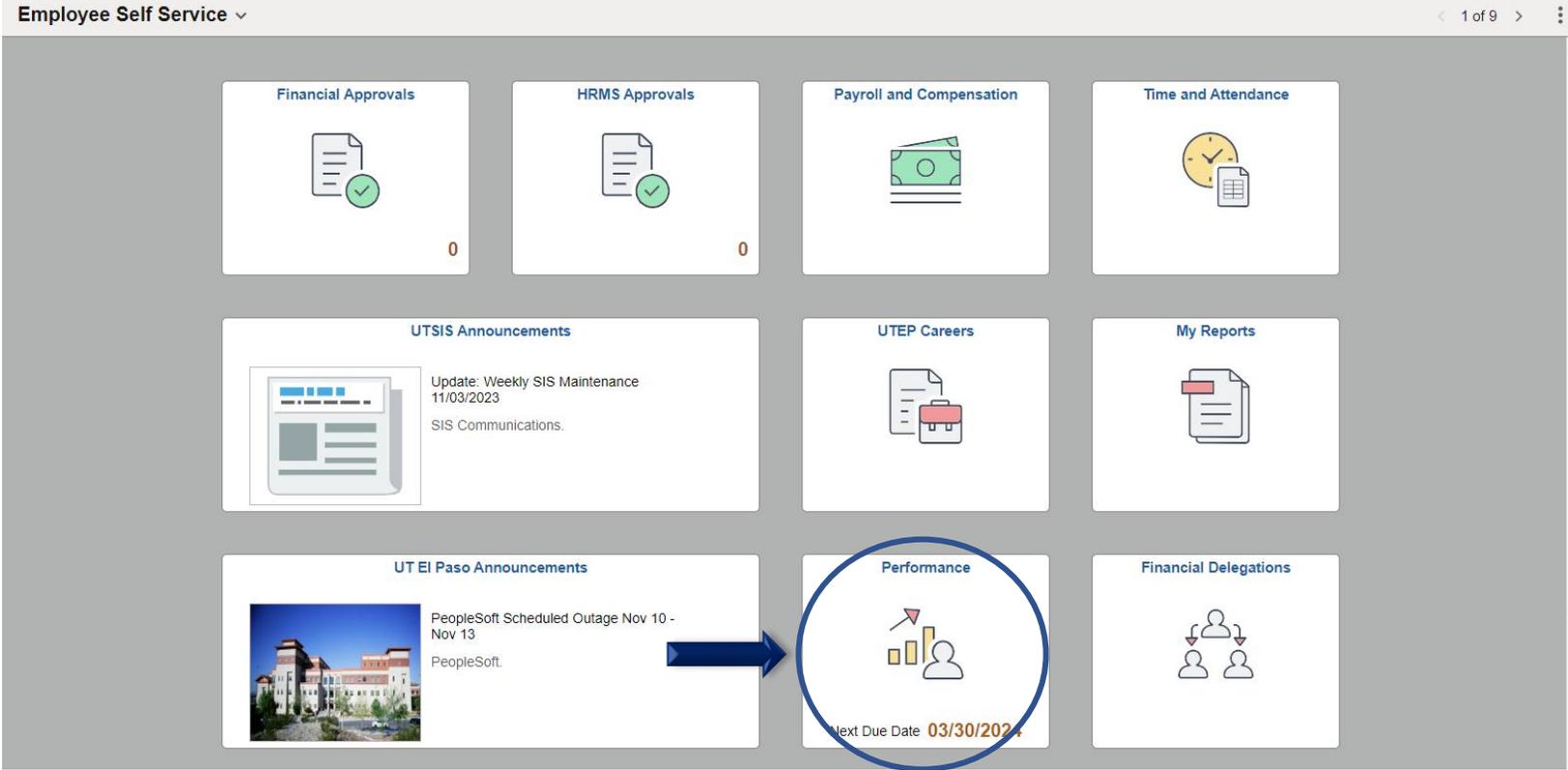The person being evaluated.

Manager

The employee's direct manager who is responsible for evaluating the employee.
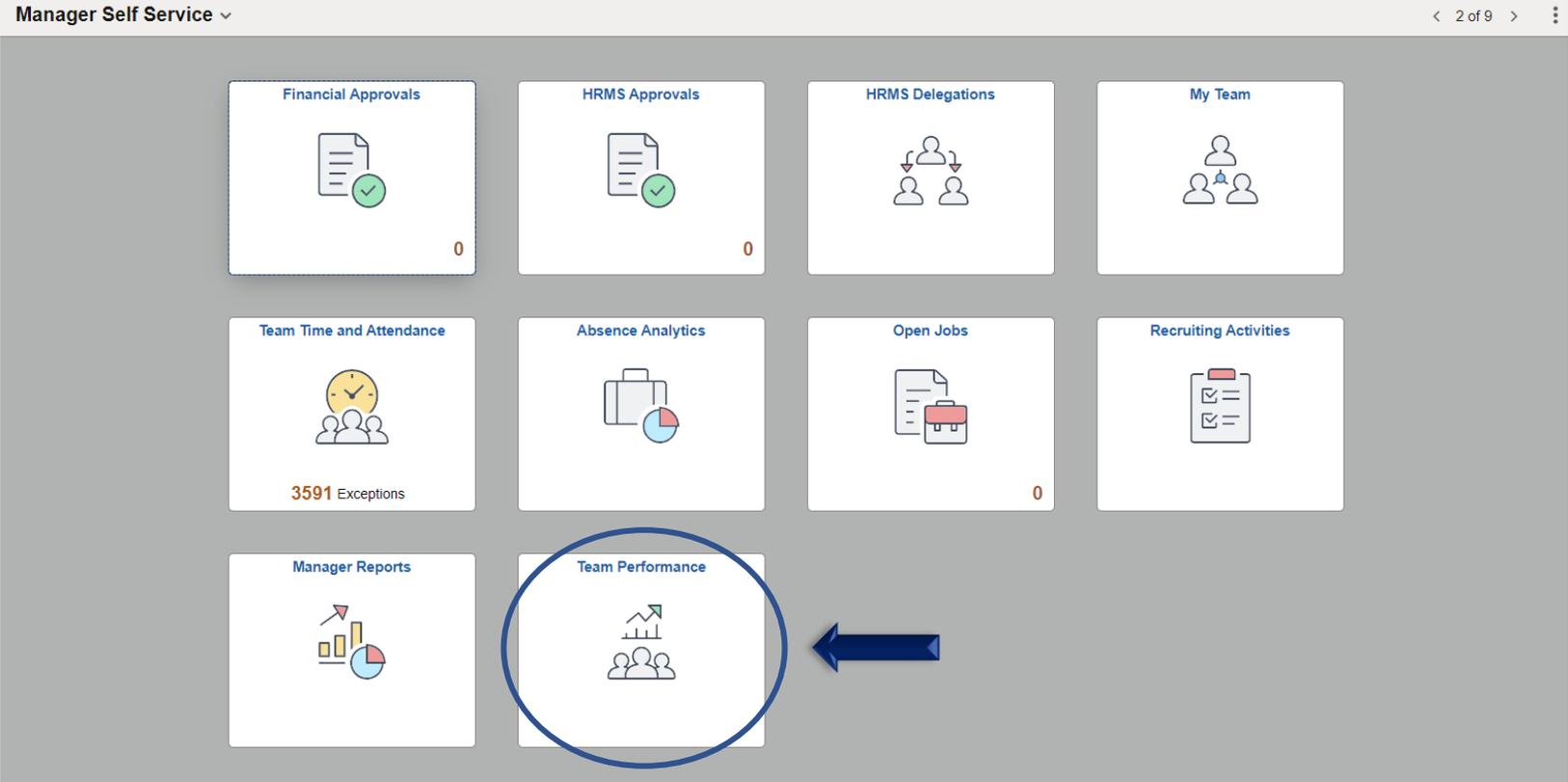
Second-Level Manager

The Manager's direct "Reports To" who approves evaluations received from the Manager.

Employee Self-Service View

Access to a variety of employee self-service transactions.

Manager Self-Service View

Access to a variety of manager transactions. View performance documents for employees under Team Performance tile.

Demo

E-PERFORMANCE – 2024 EVALUATION STEPS

Step 1: Manager Accesses PeopleSoft

- Utilize **'MANAGER SELF-SERVICE'**

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Step 2: Manager Defines Goals

- This step requires managers to add Goals if they were not added at the beginning of 2024
- Optional: Update/define Competencies for 2024 Evaluation
- **Submit Goals** (2024 Goals must be submitted to unlock 2024 evaluation)

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Optional: Employee Completes Self-Evaluation

- Employee **Completes** Self-Evaluation to include Feedback/Comments on Goals, Ratings on Competencies
- Manager may continue to Step 3 even when employee has not completed self-evaluation

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Step 3: Manager Completes Evaluation

- Initiate 2024 Evaluation by giving feedback on goals
- Add ratings and comments to Competencies under each Criteria
- Identify Strengths and Challenges
- Provide Overall Summary
- **Submit Evaluation** to Next Level Supervisor for approval
- Next Level Supervisor **Denies or Approves**

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Optional: Manager Schedules One/One

- Schedule one-on-one with employee after 2024 Evaluation is completed
- Discuss Goals for 2025

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Step 4: Manager Requests Acknowledgement

- Update status on evaluation to **Share with Employee**
- When sharing document with employee manager is Requesting Acknowledgement

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Step 5: Employee Acknowledges

- Employee may add comments
- Evaluation is marked as Complete when employee sets status to **Acknowledged**

Evaluation available in 'Historical Documents'

UTEP

Performance Ratings

| Performance Rating	Performance Rating Definitions
Exceptional (5)	Consistently exceeds goals and expectations. Demonstrates superior performance and routinely performs at a level above current responsibilities. Results have a substantial impact beyond individual role and team, impacting the department, unit and/or University. Performance at this level occurs throughout the year. Consistently demonstrates behaviors beyond competency expectations.
Exceeds Expectations (4)	Consistently meets and frequently exceeds goals and expectations. Delivers results that are beyond the scope of the current role and responsibilities. Produces results that involve extra, unique or innovative contributions and solutions. Frequently demonstrates behaviors within and above competency expectations.
Meets Expectations (3)	Consistently meets goals and expectations and may exceed one or more expectations. Meets the expectations for the role and for the team. Delivers important and valuable results throughout the year. Models behaviors within competency expectations.
Needs Improvement (2)	Meets expectations for some objective but has not met all performance objectives and behavioral expectations. Acceptable performance in some areas but needs improvement in other areas. Performs basic position duties and responsibilities, needs continued development in order to fully perform to expectations. A performance plan is recommended.
Unsatisfactory(1)	Does not meet most goals or expectations. Did not achieve expected overall results during the past year. Performance frequently fails to meet minimum requirements and expectations. Significant improvement required. Immediate action is required to improve performance and/or behavior.

Tips When Completing Annual Evaluations

Tips for Managers –

- Deliver objective and constructive feedback
- Reflect on the totality of the employee's performance within the entire review period (January 2024 – December 2024)
- Provide clear and specific examples in the 'Manager Comment" sections to justify your ratings for each criterion

Merit Increases

- Merit Increase Policy: [Business Affairs - Merit Increases Policy](#) –

  Subject to funding and a satisfactory performance evaluation, every employee at the University is eligible for a merit increase consideration during the annual review process.

- Supervisors <u>must</u> complete a performance evaluations for each of their employees during the annual review process conducted between January and March of the preceding year. **The period to be evaluated is the previous calendar year.**
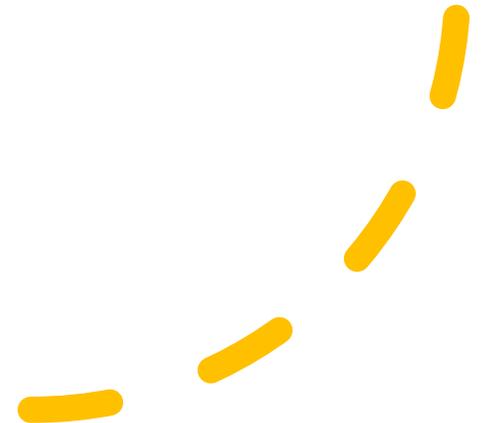
2025 GOALS

- The 2025 goals module will become available after the current ePerformance period concludes.

- Managers are encouraged to establish and organize goals at the start of each year.

- Once the PeopleSoft module is available, managers can upload goals directly to their employee's e-Performance file.

- Once the evaluation becomes available, Managers can access the goal-setting step. This stage will be completed when the goals are successfully 'submitted'.

Frequently Asked Questions

1. **Where can I locate my staff evaluations?** Manager Self Service> Team Performance Tile> Current Documents> *Initiate Evaluation*
2. **What is the process to initiate evaluations for all new hires?** Human Resources will run a report on a monthly basis to determine all new hires. HR will then create the evaluation and notify the immediate supervisor so they can define goals.
3. **Can I upload attachments to a staff evaluation?** Managers can add documents of any accomplishments in the employee evaluation.
4. **Can I make any changes to the staff evaluation once the Next Level Supervisor approves?** If changes need to be made to the evaluation, you can select the reopen link within the evaluation. Please be advised that if the evaluation is reopened, it will restart the approval process.
5. **The employee currently does not have an immediate supervisor on record, what happens to the employee's evaluation?** Human Resources will run report to ensure changes and verification is conducted in order to assign the employee to the correct manager.
6. **What happens if the evaluating manager is out on FMLA?** If an employee is out on FMLA, contact Human Resources at employeerelations@utep.edu for further assistance.

Email questions to:

er-eperformance@utep.edu

Thank you!

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employeerelations@utep.edu