2019 Staff Evaluations
ePerformance
Agenda

• What’s new?
• Evaluation Steps
• Demo
• 2020 Goal Setting
ePerformance

What is ePerformance?

• Electronic evaluation system within PeopleSoft that allows managers to create, route, and store evaluations electronically.

• Evaluation will be a permanent part of the employee record within PeopleSoft.
ePerformance Evaluation Roles

**Employee**
- The person being evaluated.

**Manager**
- The employee’s direct manager who is responsible for evaluating the employee.

**Next Level Supervisor**
- The Manager’s direct “Reports To” who approves evaluations received from the Manager.
What’s New?

• New navigation
• New look and feel
• New Functionality
  – Optional employee self-evaluations
  – Option to copy goals and competencies from prior years or from other employees
  – Option to re-open an evaluation in progress
  – Default competencies
Look and Feel
PeopleSoft Navigation

Employee access to current and prior year evaluations. Prior year only includes 2018.
Look and Feel
PeopleSoft Navigation

Manager access to current and prior year evaluations. Prior year only includes 2018.
Look and Feel

Task Panel
- Employee Information
- Document Status
Look and Feel

• **Tab View**

• **Add Item - Copy Feature**
  – Goals
  – Competencies

Section 1 - UTEP Goal Setting and Development Planning

- At the beginning of each year, managers should establish 3-6 goals for employees aligned with University vision/mission. If work goals were set for the previous year, provide comments and discuss the employee's progress towards achieving these goals.
New Functionality

Employee Self-Evaluation

- Employees can self-evaluate after the manager submits goals.
- Feedback is available to the manager as he/she is performing the evaluation.
- Final rating will show both the manager rating and the employee rating.
New Functionality

Reopen Evaluation

- Allows manager to modify ratings and feedback
- Causes workflow to re-start
2019 ePerformance Evaluation

1. **Manager: Goals Setting**
   - Add Goals if they were not added at the end of the 2018 Evaluation period.
   - Optional - Define Competencies
   - Submit Goals

2. **Employee: (Optional) Self Evaluation**
   - Complete the Self Evaluation to include Feedback on Goals, Ratings on Competencies and Employee Comments.

3. **Manager: Complete Evaluation**
   - Initiate the 2019 evaluation to include feedback on goals.
   - Add Ratings to Competencies
   - Add Manager Comments
   - Identify Strengths & Challenges
   - Provide Overall Summary
   - Submit Evaluation to Next Level Supervisor
   - Next Level Supervisor Approve

4. **Manager: Employee One/One**
   - Schedule One/One with Employee
   - Update status to Share with Employee
   - Update status to Request Acknowledgement
   - Discuss 2020 Goals

5. **Employee: Acknowledgement**
   - Add Employee Comments
   - Update status to Acknowledged

6. **Manager: Complete**
   - Update status to Complete
   - Evaluation is now Closed
Step 1: 2019 Goal Setting

- 2019 goals should have been submitted at the end of the 2018 evaluation period. If you did not submit the goals at that time, you will need to submit them before beginning the 2019 evaluation.

- Goal setting encompasses the following two steps:
  1) Set employee Goals
  2) Optional: Prepare employee Criteria and Competencies

- Manager clicks **Submit** to finalize the Goal Setting process. This enables the evaluations to become available.

**Important:** Employee self-evaluation cannot be initiated until the goals have been submitted by the manager. **Once goals are submitted, they cannot be modified.**
Step 2: Employee Self-Evaluation

- The self-evaluation consists of the following sections:
  - Evaluate "Prior Year" goals
  - Evaluate Rate Competencies
  - Provide an overall evaluation Summary
- Once the employee **Completes**, an e-mail will be sent to the manager.

**Important**: Self-Evaluations are not required, and managers should discuss self-evaluations with their team.
Step 3: Complete Evaluation

- Once goals are Submitted, the Evaluation becomes available.
- Managers will complete and submit the evaluation forms. Steps will include:
  - Evaluate "Prior Year" goals
  - Rate Competencies
  - Identify Employee Strengths and Challenges
  - Provide an overall evaluation summary
- **Submit** evaluation. This will send an email to the Next Level Supervisor for review and approval. If the manager submitting the evaluations reports directly to the president or provost, this step will be skipped.
- Next Level Supervisor **Approves** evaluation.
Step 4: One/One Session & Approval

• After the Next Level Supervisor approves the evaluation, the Manager will receive an e-mail notification and he/she should schedule a meeting with the employee to review the evaluation.

• **Manager must** complete the following 3 steps:
  1) **Share with Employee** - This makes the evaluation available for review by the employee through the PeopleSoft portal.
  2) **Request Acknowledgement** – This step asks the employee to provide comments and acknowledge that the evaluation has been reviewed with the Manager.
  3) Discuss the upcoming goals for 2020.
Step 5: Employee Acknowledgement

- Employee can provide comments.
- Employee **Acknowledges** the evaluation was reviewed with the Manager.

**Note:** *If the employee is unable or not willing to Acknowledge the evaluation, the Manager can Override the document status to Complete.*
Step 6: Completion

• After the evaluation has been acknowledged, the Manager will go back and update the document status to **Complete** in order to close the evaluation.

• Evaluation document is now available under “**Historical Documents**” in the Employee & Manager Self-Service sections
2020 Goal Setting

- Goal setting for the next year encompasses the following 2 steps:
  1. Enter next year’s Goals into the system.
  2. Define employee Criteria and Competencies for next year.
- Managers can **Save** their work and make changes at a later date.
  - This enables employees to view the goals in their Performance tile under the Employee Self-Service home page throughout the year.
- Managers can **Submit** their Goals and Competencies for next year. We suggest waiting until next January to submit the goals.

**Reminder:** Managers will not be able to make changes to the Goals after submitting.
Reminders

• **Location of Evaluations** - Performance evaluations are located in the **Team Performance Tile** in the **Manager Self Service** homepage
  – To initiate evaluations, managers can access the documents by clicking on **Current Documents**.
  – Employees can **View** their completed evaluations in the **Performance Tile** located in the **Employee Self Service** home page.

• **Attachments** - Managers can add documents and attachments of any accomplishments in the employee’s evaluation.

• **Changes to the evaluation** - If changes need to be made to the evaluation after the Next Level Supervisor approves the document, you can now select the **Reopen** link within an evaluation.

  **Please Note:** This will require the evaluation to go through the approval process once again.
Resources

• Performance Evaluation [Web Page]

• Training
  – Presentations
  – Documents
  – Quick Guides
  – Video Tutorials

• If you need any assistance or have any questions, please submit a ticket to helpdesk@utep.edu.
Questions?