

Manager - Copy Competencies

If you created specific competencies for another employee or in prior year evaluations that you would like included in this evaluation, you have the option of copying these competencies. If you plan on encouraging employee self-evaluations, these should be set-up prior to the employee conducting his/her self-evaluation.



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

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Performance Process

Steps and Tasks

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

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

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

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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

Goal Setting Quality of Work Productivity Reliability

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Section 2 - UTEP Performance Criteria - Quality of Work

Sections 2 through 5 - Assign ratings and weight to Competencies.
For more information on how to determine ratings/weight for Competencies...

Quality of Work a criterion defining the of the employee's job
competency means the employee es work related to the job requirements.

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Expand Collapse Add Item

UTEP Performance Evaluation
Add Item

Add pre-defined item
Add your own item
Copy Item from My Team's Documents

8

Next
Return

9

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"/> 13	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"/> 14	Customer Services
<input type="checkbox"/>	Accuracy

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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.

UTEP Performance Evaluation

Define Criteria - Update and Submit

Jorge Lopez
Actions

Job Title
Document Type Period -

16 17

Print | Notify

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.

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