Staff Evaluations
ePerformance

UTSHARE

PEOPLESoft
THE UNIVERSITY OF TEXAS AT EL PASO
Agenda

- What is ePerformance
- Navigation
- Evaluation Steps
- Demo
- Goal Setting – goal setting for current year
ePerformance

What is ePerformance?

• Electronic evaluation system within PeopleSoft
  – It’s a safe and easy way for managers and employees to access evaluations electronically.
    • Evaluation will be a permanent part of the employee record which will be maintained in PeopleSoft.
Why complete a Performance Evaluation

• Annual review of employee performance
  – performance management
• Set new goals
• Ability to create growth plan
• Refocus on team mission and vision
• Highlights the training needs of your team
• Accountability and areas of improvement
• Justification to merit Increases
E-Performance 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.
Navigation Process
PeopleSoft Navigation

Employee access to current and prior year evaluations. Prior year only includes 2019
PeopleSoft Navigation

Manager access to current and prior year evaluations. Prior year only includes 2019.
Navigating through a Performance Eval
Navigating through a Performance Eval

Task Panel
- Employee Information
- Document Status

Performance Process
Steps and Tasks

- Goal Setting
  - Due Date: 03/31/2019
  - Update and Submit

- Review Self Evaluation
  - Due Date: 12/31/2019
  - View

- Complete Manager Evaluation
  - Due Date: 03/30/2020
  - Update and Submit
  - Pending Approval
  - Share with Employee
  - Request Acknowledgement

Define Criteria - Update and Submit
Erick Reza Pena
Actions

- Job Title: Accountant
- Document Type: UTEP
- Template: UTEP
- Status: In Progress

1. Review the performance criteria (goals and/or results)
2. Make any necessary adjustments to the criteria
3. Once the performance criteria is correct, select the appropriate action button

Section 1 - UTEP Goal Setting and Development

- At the beginning of each year, managers should establish goals for the current year, leveraging the goals set for the previous year, provide comments and directions.
Step by Step process
ePerformance Evaluation Steps

1. **Manager:** Goals Setting
   - Add Goals if they were not added at the end of the 2019 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: Goal Setting

• Initiate – manager inbox

• EX: 2020 goals should have been submitted at the end of the 2019 evaluation period. If you did not submit the goals at that time, you will need to submit them before beginning the 2020 evaluation.

• Goal setting encompasses the following two steps:
  1) Set employee Goals
  2) 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 and criteria changes have been submitted by the manager.

*Once goals are submitted, they cannot be modified.*
Step 2: Employee Self-Evaluation (optional)

- The self-evaluation consists of the following sections:
  - Manager decision – pros/cons
  - Initiated – employee inbox (will only be available when Manager completes Goals)
  - Evaluate goals set for 2020
  - 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

- Initiated - Manager inbox (open when goals are completed)
- Once evaluation has been released to the employee, the Evaluation becomes available for the manager.
- Managers will complete and submit the evaluation forms. Steps will include:
  - Evaluate 2020 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/Disapproves** evaluation.
Step 4: One/One Session & Approval

- After the Next Level Supervisor has approved the evaluation, the Manager will receive an e-mail notification. The Manager 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 the employee to review manager ratings and comments.
  2. **Discuss the upcoming goals for 2021** – Managers should discuss goals for the coming calendar year.
  3. **Request Acknowledgement** – This step asks the employee to provide comments and acknowledge the evaluation has been reviewed with the Manager.
Step 5: Employee Acknowledgement

- Once the Manager has requested acknowledgement, the Employee will have the opportunity to 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 **Submit, refresh and Complete** in order to close the evaluation.

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

• Goal setting for the current year encompasses the following 2 steps:
  1. Enter 2021 Goals into the system.

• Managers can Save their work and update throughout the year if deemed necessary.
  • This enables employees to view the goals in their Performance tile under the Employee Self-Service home page throughout the year.

• We recommend Managers not Submit their Goals and Competencies for next year. We suggest waiting until January 2022 to submit the goals.

Reminder: Managers will not be able to make changes to the Goals
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
ePerformance Demo

- Demo
Questions?