

UTSA People Excellence

Employee Self-Evaluation

Individual Contributor

Employee Self-Evaluation – Individual Contributor ePerformance Guide

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Overview

The Employee Self-Evaluation allows an employee to create goals and complete self-assessment on his/her job performance. It includes details about the ability to meet goals and performance factors.

Employee Accesses PeopleSoft

Employee Completes
Goal Setting

- Submission generates email to manager

Manager Evaluates
Employee Goals

- Submission generates email to employee

Manager & Employee:
Mid-Year Check In

Employee Completes
Self-Evaluation

- This section requires employees to rate him/herself in **Goals, Core Values, Operation Excellence** and **Personal Growth**.

Employee Submits Evaluation
to Manager

- Submission generates email to manager

Manager & Employee:
One-on-One Meeting

Manager Requests
Acknowledgement from
Employee

- Requesting acknowledgement generates an email to employee

Employee Acknowledges (Or
Manager Overrides)

- Acknowledgement generates an email to manager

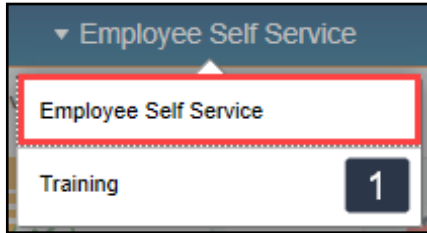
Manager Completes Evaluation

- Completion generates an email to manager and employee

Evaluation available in Historical Documents

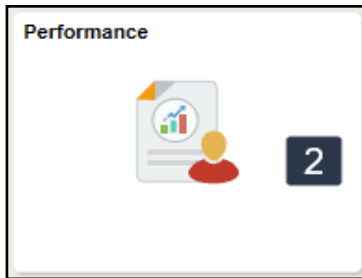
Step 1 of 22 – Employee Self-Service

Select the **Employee Self Service** option from the drop-down on the PeopleSoft homepage.



Step 2 of 22 – Performance Tile

Select the **Performance** tile.



Step 3 of 22 – My Current Documents

The performance documents will appear under **My Current Documents**. Select **UTSA Performance Evaluation**.

Note: The evaluation status is currently in Define Criteria. Upon the completion of goals and receiving manager approval, you will be able to complete employee self-evaluation.

Employee Self Service

Performance

Madison Webb

STUDENT INTERN

My Current Documents 1

My Historical Documents

Evaluations of Others 0

Historical Evaluations of Others

My Current Documents

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Performance Evaluation	Define Criteria	09/01/2021 08/31/2022	11/15/2021

Step 4 of 22 – Goal Setting

Add performance criteria (Goals) that you plan to accomplish during the performance period.

Select **Add Item** and choose **Add your own item** from the available options. Enter goal information, including dates and full description.

Performance Process

UTSA Performance Evaluation

Define Criteria - Update

Madison Webb

Job Title: STUDENT INTERN
Document Type: UTSA Performance Evaluation
Template: Executive: FY2022
Status: In Progress

Manager: Tymeeka Middleton
Period: 09/01/2021 - 08/31/2022
Document ID: 20330
Due Date: 11/15/2021

Instructions: Employee Goal Setting

- To start, select **Add Item** to add a new goal for this new performance cycle. You may click **Save** in the upper-right hand corner to leave the page and come back later.
- Once you have added all your goals for the new performance cycle, click **Notify** in the upper right-hand corner to send a direct email message to your manager letting them know that you are done.
- If you do not plan to set any goals for this performance cycle, click **Notify** in the upper right-hand corner to send a direct message to your manager letting them know you will not be adding goals and that they can proceed.

Section 1 - Goals

Add Item

Performance Process

UTSA Performance Evaluation

Add Item

☐ Add pre-defined Item

☒ Add your own Item

☐ Copy item from Manager Document

☐ Copy Item from My Documents

Next

Return

Performance

Performance Process

UTSA Performance Evaluation

Steps and Tasks

Madison Webb

UTSA Performance Evaluation

09/01/2021 ~ 08/31/2022 Overview

Goal Setting

Due Date 11/15/2021

Update

Goals Mid-Year Check In

Due Date 03/15/2022

Open Evaluation

Due Date 07/01/2022

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

Add Your Own Item

*Title Goal 1

Description

Font Size B I U

Goal 1 description

Measurement

Due Date

Reminder Date

Start Date

End Date

Critical

Stretch Goal

Add

Return

Note: There is a spell check option that you can use to correct misspelling errors before submitting.

Step 5 of 22 – Goal Setting (Continuation)

Click **Add**. Repeat steps as needed.

Performance Process

UTSA Performance Evaluation

Add Your Own Item

*Title: Goal 1

Description: Goal 1 description

Measurement:

Due Date: (example 12/31/2000)

Reminder Date: (example 12/31/2000)

Start Date:

End Date:

☐ Critical

☐ Stretch Goal

Add

[Return](#)

Step 6 of 22 – Notify Manager

Select the **Notify** and **Send** on the pop-up message to email the added goals to your manager.

Note: Select **Save** before continuing.

Performance Process

UTSA Performance Evaluation

Define Criteria - Update

Madison Webb

Job Title	STUDENT INTERN	Manager	Tymeeeka Middleton
Document Type	UTSA Performance Evaluation	Period	09/01/2021 - 08/31/2022
Template	Executive: FY2022	Document ID	20330
Status	In Progress	Due Date	11/15/2021

Instructions: Employee Goal Setting

- To start, select **Add Item** to add a new goal for this new performance cycle. You may click **Save** in the upper-right hand corner to leave the page and come back later.
- Once you have added all your goals for the new performance cycle, click **Notify** in the upper right-hand corner to send a direct email message to your manager letting them know that you are done.
- If you do not plan to set any goals for this performance cycle, click **Notify** in the upper right-hand corner to send a direct message to your manager letting them know you will not be adding goals and that they can proceed.

Section 1 - Goals

Goal 1

Description: Goal 1 description

Measurement:

- Reminder Date:
- Due Date:
- Critical: No
- Stretch Goal: No
- Start Date:
- End Date:

Notify

Performance

Performance Process

Performance Process

Steps and Tasks

Madison Webb

UTSA Performance Evaluation

09/01/2021 08/31/2022 Overview

Goal Setting

Due Date 11/15/2021

Update

Goals Mid-Year Check In

Due Date 03/15/2022

Open Evaluation

Due Date 07/01/2022

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

Please enter your email message and select the the send button.

To

tymeeka.middleton@utsa.edu;

Subject

This is a notification regarding the UTSA Performance Evaluation for Madison Webb.

Message Text

254 characters remaining

Send

Cancel

Manager will review goals and update the document status of the evaluation to “track progress.”

Repeat steps 1-3 to attain the **Goal Mid-Year Check In** page.

Employee Self Service

Performance

Home Search Menu

Madison Webb
STUDENT INTERN

My Current Documents
1

My Historical Documents

Evaluations of Others
0

Historical Evaluations of Others

My Current Documents

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Performance Evaluation	Track Progress - Goals Mid-Year Check In	09/01/2021 08/31/2022	03/15/2022

Repeat steps 4-6 to add goals if needed.

Performance

Performance Process

Steps and Tasks

Madison Webb

UTSA Performance Evaluation

09/01/2021 - 08/31/2022 Overview

Goal Setting

Due Date 11/15/2021

Goals Mid-Year Check In

Due Date 03/15/2022

Update and Share

Review Manager Comments

Open Evaluation

Due Date 07/01/2022

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

Performance Process

UTSA Performance Evaluation

Goals Mid-Year Check In - Update and Share

Section 1 - Goals

Expand Collapse Add Item

Goal 1

Description : Goal 1 description

Measurement :

- Reminder Date :
- Due Date :
- Critical: No
- Stretch Goal: No
- Start Date :
- End Date :

Manager Comments

Manager's comments are not shared

Employee Comments

Step 9 of 22 – Share with Manager

Click **Share with Manager** and **Confirm** to share your comments with your manager.

Performance

Performance Process

Save

Share with Manager

Performance Process

Steps and Tasks

Madison Webb

UTSA Performance Evaluation

09/01/2021 - 08/31/2022 Overview

Goal Setting

Due Date 11/15/2021

Goals Mid-Year Check In

Due Date 03/15/2022

Update and Share

Review Manager Comments

Open Evaluation

Due Date 07/01/2022

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

UTSA Performance Evaluation

Madison Webb

Job Title

STUDENT INTERN

Manager

Tymeeka Middleton

Document Type

UTSA Performance Evaluation

Period

09/01/2021 - 08/31/2022

Template

Executive: FY2022

Document ID

20330

Status

In Progress

Due Date

03/15/2022

Attention! Your comments are currently not shared with your manager and remain private until shared or until the checkpoint is complete.

Instructions: Mid-Year Goals Check-In

This step allows you and your manager to adjust goals and make progress comments that will be captured as part of your annual evaluation. To add goals, select the **Add Item** below. If your manager chooses, they will make comments on your goals and share their feedback with you. Otherwise, you can capture any comments and save for your manager to view by selecting **Share with Manager**.

Section 1 - Goals

Expand Collapse Add Item

Goal 1

Description : Goal 1 description

Measurement :

Reminder Date :

Due Date :

Critical: No

Stretch Goal: No

Start Date :

End Date :

Performance

Performance Process

Share Comments

Select confirm to share your comments with your manager.

Confirm

Cancel

Performance Process

Steps and Tasks

Madison Webb

UTSA Performance Evaluation

09/01/2021 - 08/31/2022 Overview

Goal Setting

Due Date 11/15/2021

Goals Mid-Year Check In

Due Date 03/15/2022

Update and Share

Review Manager Comments

Open Evaluation

Due Date 07/01/2022

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

9

Step 10 of 22 – Notify Manager

Select **Notify** and then **Send** on the pop-up message to email the added goals or comments to your manager.

The image displays two screenshots of the UTSA Performance Process interface, illustrating the steps to notify a manager.

Top Screenshot: Performance Process - UTSA Performance Evaluation

The interface shows the performance evaluation for Madison Webb. The left sidebar lists the steps and tasks, including Goal Setting, Goals Mid-Year Check In, Open Evaluation, Complete Self Evaluation, and Review Manager Evaluation. The main content area displays the evaluation details, including Job Title (STUDENT INTERN), Document Type (UTSA Performance Evaluation), Template (Executive: FY2022), Status (In Progress), Manager (Tymeeka Middleton), Period (09/01/2021 - 08/31/2022), Document ID (20330), and Due Date (03/15/2022). A red box highlights the **Notify** button in the top right corner.

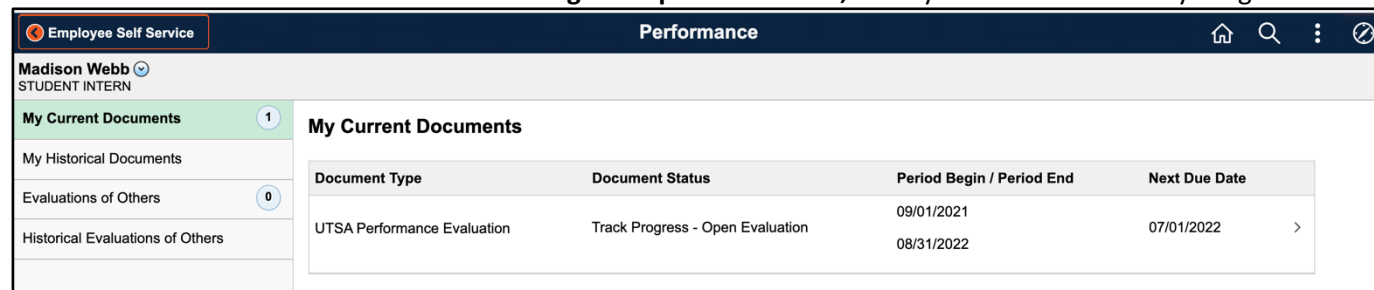
Bottom Screenshot: Notify Manager

The interface shows the 'Notify Manager' pop-up form. The left sidebar is the same as the top screenshot. The main content area prompts the user to enter an email message and select the send button. The 'To' field contains 'tymeeka.middleton@utsa.edu;'. The 'Subject' field contains 'This is a notification regarding the UTSA Performance Evaluation for Madison Webb.' The 'Message Text' field is empty. A red box highlights the **Send** button at the bottom.

Step 11 of 22 – Open Evaluation

Repeat steps 1-3 to attain the **Open Evaluation** page.

Note: The document status is now in **Track Progress-Open Evaluation**, readily available to finalize your goals.



Employee Self Service Performance

Madison Webb
STUDENT INTERN

My Current Documents 1

My Historical Documents

Evaluations of Others 0

Historical Evaluations of Others

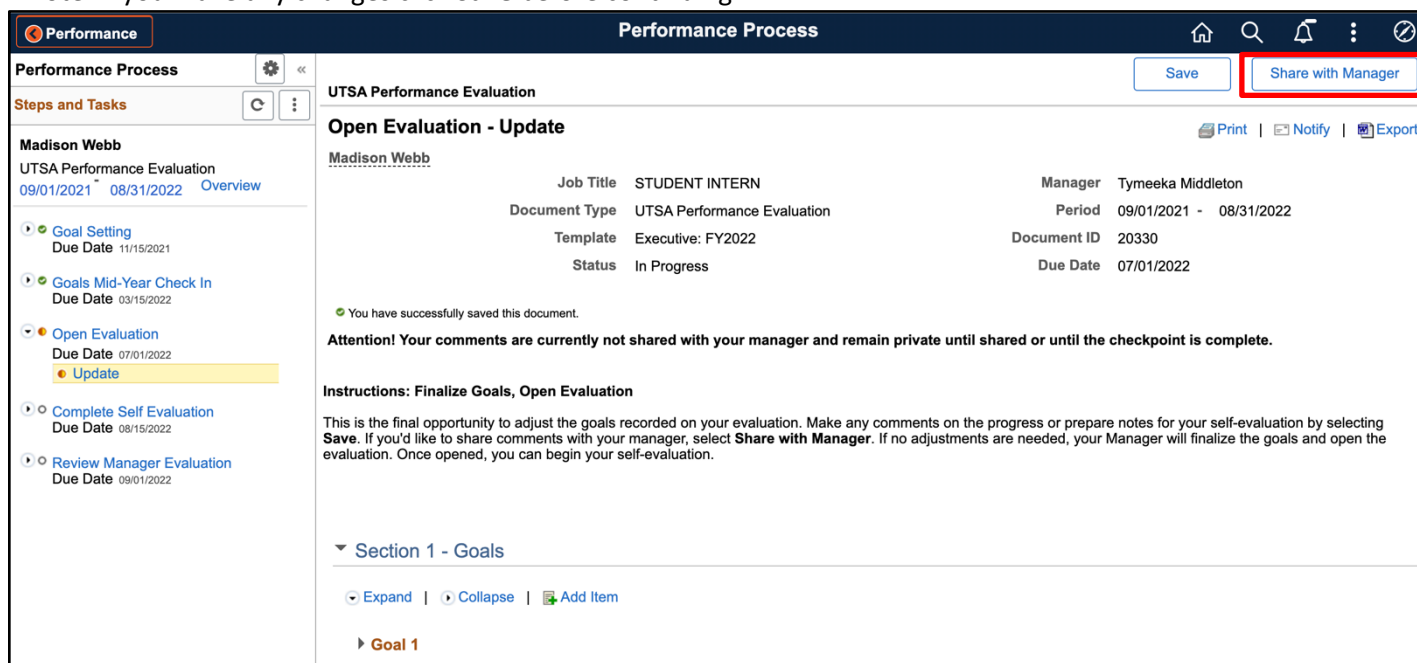
Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Performance Evaluation	Track Progress - Open Evaluation	09/01/2021 08/31/2022	07/01/2022 >

Step 12 of 22 – Open Evaluation (Continuation)

Repeat step 8 if you need to make any final changes to your goals before continuing to the evaluation.

Repeat step 9 to complete this checkpoint.

Note: If you make any changes click **Save** before continuing.



Performance Process

UTSA Performance Evaluation

Save Share with Manager

Print | Notify | Export

Open Evaluation - Update

Madison Webb

Job Title	STUDENT INTERN	Manager	Tymeeka Middleton
Document Type	UTSA Performance Evaluation	Period	09/01/2021 - 08/31/2022
Template	Executive: FY2022	Document ID	20330
Status	In Progress	Due Date	07/01/2022

You have successfully saved this document.

Attention! Your comments are currently not shared with your manager and remain private until shared or until the checkpoint is complete.

Instructions: Finalize Goals, Open Evaluation

This is the final opportunity to adjust the goals recorded on your evaluation. Make any comments on the progress or prepare notes for your self-evaluation by selecting **Save**. If you'd like to share comments with your manager, select **Share with Manager**. If no adjustments are needed, your Manager will finalize the goals and open the evaluation. Once opened, you can begin your self-evaluation.

Section 1 - Goals

Expand | Collapse | Add Item

Goal 1

Steps and Tasks

Madison Webb

UTSA Performance Evaluation

09/01/2021 - 08/31/2022 Overview

- Goal Setting Due Date 11/15/2021
- Goals Mid-Year Check In Due Date 03/15/2022
- Open Evaluation Due Date 07/01/2022**
 - Update
- Complete Self Evaluation Due Date 08/15/2022
- Review Manager Evaluation Due Date 09/01/2022

Performance

Performance Process

Performance Process

Steps and Tasks

Madison Webb

UTSA Performance Evaluation

09/01/2021 ~ 08/31/2022 Overview

Goal Setting

Due Date 11/15/2021

Goals Mid-Year Check In

Due Date 03/15/2022

Open Evaluation

Due Date 07/01/2022

Update

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

Share Comments

Select confirm to share your comments with your manager.

Confirm

Cancel

Step 13 of 22 – Employee Self-Evaluation

Repeat steps 1-3 to attain the **Employee Self-Evaluation** page.

Note: The document status is now **Evaluation in Progress**, readily available to complete your employee self-evaluation.

Performance Doc		Performance			
Madison Webb					
STUDENT INTERN					
My Current Documents 1		My Current Documents			
My Historical Documents					
Evaluations of Others 0					
Historical Evaluations of Others					
		Document Type	Document Status	Period Begin / Period End	Next Due Date
		UTSA Performance Evaluation	Evaluation in Progress	09/01/2021 08/31/2022	08/15/2022 >

Step 14 of 22 – Goals

Select the **Goals** tab, click **Expand** to review goals. Rate yourself on each goal.

The rating scale goes from Goal Achieved to Goal Not Achieved.

The screenshot displays the 'Performance Process' interface for 'UTSA Performance Evaluation'. The 'Goals' tab is selected and highlighted with a red box. The 'Expand' button for 'Test Goal 1' is also highlighted with a red box. The 'Test Goal 1' section shows a description of 'Test' and a measurement of 'Test'. Below this, there is a list of dates: Reminder Date, Due Date, Critical: No, Stretch Goal: No, Start Date, and End Date. At the bottom, there is a rating scale with two options: 'Goal Achieved' (selected with a checkmark) and 'Goal Not Achieved'. The 'Employee Rating' and 'Employee Comments' fields are visible at the bottom of the page.

Step 15 of 22 – Core Values

Select the **Core Values** tab, click **Expand** to review.

Rate yourself on each Core Value.

The rating scale goes from 1=Does Not meet Expectations to 5=Role Model.

The screenshot displays the 'Performance Process' interface for 'Rex Johnson'. The 'Steps and Tasks' sidebar on the left lists various evaluation steps, with 'Complete Self Evaluation' (due 08/15/2022) and its sub-step 'Update and Complete' (due 08/31/2022) highlighted. The main content area is titled 'Self-Evaluation - Update and Complete' and features tabs for 'Goals', 'Core Values', 'Operation Excellence', 'Personal Growth', and 'Summary'. The 'Core Values' tab is selected and highlighted with a red box. Below the tabs, 'Section 2 - Core Values' is expanded, showing a description of the organization's values. An 'Expand' button is also highlighted with a red box. Under the 'Integrity' category, a description is provided. A dropdown menu for 'Employee Rating' is open, showing a scale from 1 to 5, with the entire menu highlighted by a red box. The rating options are: 1. Does Not Meet Expectations, 2. Somewhat Meets Expectations, 3. Meets Expectations, 4. Exceed Expectations, and 5. Role Model. The 'Employee Comments' field is visible below the rating dropdown.

Step 16 of 22 – Operation Excellence

Select the **Operation Excellence** tab, click **Expand** to review. Rate yourself on each value. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.

The screenshot displays the 'Performance Process' interface for 'Rex Johnson'. The 'Steps and Tasks' sidebar on the left lists various evaluation steps, with 'Update and Complete' highlighted. The main content area shows the 'Self-Evaluation - Update and Complete' section, where the 'Operation Excellence' tab is selected. Below this, 'Section 3 - Operational Excellence' is expanded, showing a description of the workplace philosophy. The 'Customer Focus' section is also visible, with a description of its purpose. A rating dropdown menu is open, showing a scale from 1 to 5, with '1. Does Not Meet Expectations' selected. The interface includes navigation buttons like 'Save' and 'Complete' at the top right, and a 'Print' button at the top right of the main content area.

Performance Process

UTSA Performance Evaluation

Self-Evaluation - Update and Complete

Goals | Core Values | **Operation Excellence** | Personal Growth | Summary

Section 3 - Operational Excellence

A philosophy of the workplace where problem-solving and teamwork results in the ongoing improvement in an organization. The process involves focusing on the customers' needs and continually improving the current activities in the workplace.

Expand | **Collapse**

Customer Focus

Description : Dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.

Employee Rating **1**

Employee Comments

1. Does Not Meet Expectations
2. Somewhat Meets Expectations
3. Meets Expectations
4. Exceed Expectations
5. Role Model

Save **Complete**

Print | **Notify** | **Export**

Step 17 of 22 – Personal Growth

Select the **Personal Growth** tab, click **Expand** to review. Rate yourself on each section. The rating scale goes from 1 = Does Not Meet Expectations to 5 = Role Model.

The screenshot displays the 'Performance Process' interface for 'Rex Johnson'. The 'Steps and Tasks' sidebar on the left lists various evaluation steps, with 'Complete Self Evaluation' (Due Date: 08/15/2022) highlighted and marked as 'Update and Complete'. The main content area is titled 'Self-Evaluation - Update and Complete' and features tabs for 'Goals', 'Core Values', 'Operation Excellence', 'Personal Growth' (which is selected and highlighted with a red box), and 'Summary'. Below the tabs, the 'Section 4 - Personal Growth' is expanded, showing a description of personal growth and a list of tasks. The 'Self Development' section is also expanded, displaying a 'Description' and a list of tasks. A red box highlights the 'Expand' button next to the 'Self Development' section. Below the description, there is a table for 'Employee Rating' and 'Employee Comments'. The 'Employee Rating' column shows a rating of 5, and the 'Employee Comments' column contains a text area with a rich text editor toolbar. A red box highlights the rating scale options: 1. Does Not Meet Expectations, 2. Somewhat Meets Expectations, 3. Meets Expectations, 4. Exceed Expectations, and 5. Role Model.

Performance Process

UTSA Performance Evaluation

Self-Evaluation - Update and Complete

Goals | Core Values | Operation Excellence | **Personal Growth** | Summary

Section 4 - Personal Growth

Personal growth is the ongoing process of understanding and developing oneself in order to achieve one's fullest potential.

Expand | Collapse

Self Development

Description : Is personally committed to and actively works to continuously improve themselves; understands that different situations and levels may call for different skills and approaches; works to deploy strengths; works on compensating for weakness and limits.

Employee Rating	Employee Comments
5	

1. Does Not Meet Expectations
2. Somewhat Meets Expectations
3. Meets Expectations
4. Exceed Expectations
5. Role Model

Step 18 of 22 – Summary

Select the **Summary** tab and enter **Overall Summary** comments. Select **Calculate All Ratings** to calculate the total average **Employee Rating**.

The screenshot shows the 'Performance Process' interface for 'UTSA Performance Evaluation'. The 'Steps and Tasks' list on the left includes 'Goal Setting', 'Goals Mid-Year Check In', 'Open Evaluation', 'Complete Self Evaluation', 'Update and Complete' (highlighted), and 'Review Manager Evaluation'. The main area is titled 'Self-Evaluation - Update and Complete'. It features a 'Calculate All Ratings' button (highlighted with a red box) and a 'Summary' tab (also highlighted with a red box). Below the tabs, there is a 'Section 5 - Overall Summary' section with a text area for 'Employee Rating' (displaying 0.00) and a 'Comments' text area with a rich text editor toolbar.

Step 19 of 22 – Save

Select **Save** to keep your changes. This allows you to come back later to edit if you need more time to submit.

Step 20 of 22 – Complete

If you are done with your self-evaluation, click **Complete**. Manager will receive an email once employee self-evaluation is completed.

The screenshot shows the 'Performance Process' interface for 'UTSA Performance Evaluation'. The 'Steps and Tasks' list on the left is the same as in the previous screenshot. The main area is titled 'Self-Evaluation - Update and Complete'. It features a 'Save' button and a 'Complete' button (both highlighted with red boxes). Below the buttons, there is an 'Employee Data' section with a table of information:

Job Title	STUDENT DEVEL SPEC III	Manager	Jillian Woolard
Document Type	UTSA Performance Evaluation	Period	09/01/2021 - 08/31/2022
Template	Individual Contributor: FY2022	Document ID	18156
Status	Evaluation in Progress	Due Date	08/15/2022
Department	ASP002	EDUC OUTREACH & RETENTION	
Location	BVB	BUENA VISTA STREET BUILDING	
Years of Service	2 Years	9 Months	
Years in Job	2 Years	9 Months	

Below the table, there is an 'Instructions' section with text: 'Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the **Complete** button to save your changes and send this document to your manager for review.' At the bottom, there is a 'Calculate All Ratings' button and a 'Summary' tab (highlighted with a red box).

Complete Evaluation

You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.

Confirm

Cancel

UTSys Performance Evaluation

Confirmation - Document Completed

You have successfully completed your evaluation.

Step 21 of 22 – Employee Acknowledgment

Once you are ready to confirm the performance appraisal, review completed with your manager. Follow steps 1 – 3 to review current documents. Select the **Pending Acknowledgment** document.

Employee Self Service		Performance			
Rex Johnson					
STUDENT DEVEL SPEC III					
My Current Documents 2		My Current Documents			
My Historical Documents					
Evaluations of Others 0					
Historical Evaluations of Others					
		Document Type	Document Status	Period Begin / Period End	Next Due Date
		UTSA Performance Evaluation	Pending Acknowledgement	09/01/2021 08/31/2022	09/01/2022

Step 22 of 22 – Employee Acknowledgment (Continuation)

Select **Acknowledge** that you and your manager have reviewed the document.

Performance

Performance Process

Save

Acknowledge

Performance Process

Steps and Tasks

Rex Johnson

1

UTSA Performance Evaluation

09/01/2021 - 08/31/2022

Overview

Goal Setting

Due Date 11/15/2021

Goals Mid-Year Check In

Due Date 03/15/2022

Open Evaluation

Due Date 07/01/2022

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

Acknowledge

UTSA Performance Evaluation

Manager Evaluation - Acknowledge

Rex Johnson

Job Title STUDENT DEVEL SPEC III

Document Type UTSA Performance Evaluation

Template Individual Contributor: FY2022

Status Pending Acknowledgement

Manager Jillian Woolard

Period 09/01/2021 - 08/31/2022

Document ID 18156

Due Date 09/01/2022

Employee Data

Department ASP002

Location BVB

Years of Service 2 Years

Years in Job 2 Years

EDUC OUTREACH & RETENTION

BUENA VISTA STREET BUILDING

9 Months

9 Months

Performance

Performance Process

Steps and Tasks

Rex Johnson

1

UTSA Performance Evaluation

09/01/2021 - 08/31/2022

Overview

Goal Setting

Due Date 11/15/2021

Goals Mid-Year Check In

Due Date 03/15/2022

Open Evaluation

Due Date 07/01/2022

Complete Self Evaluation

Due Date 08/15/2022

Review Manager Evaluation

Due Date 09/01/2022

View

UTSA Performance Evaluation

Confirmation - Employee Acknowledgement

You have successfully acknowledged this document.

