

UTSA People Excellence

Probationary Review

Employee

Employee Instructions: Probationary Review Checkpoints at 45 & 90 Days and Final Evaluation at 160 Days

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Overview

The Probationary Review utilizes checkpoints which allow Managers to build upon their feedback throughout the probationary period. Checkpoints will occur at the 45- and 90-day mark. At the 160-day mark, you will complete the checkpoints and begin the probationary review evaluation. Once the evaluation is reviewed and approved by your next level supervisor, you will hold a review meeting with your employee. Once complete, the employee will sign in to acknowledge the evaluation and that a review meeting was held.

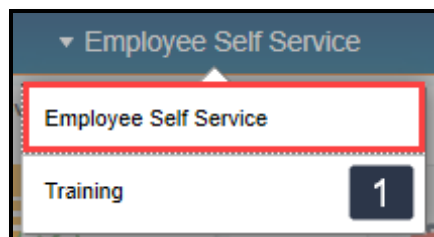
The full process should be completed prior to the end of your 6 months probationary period; therefore, the Manager probationary evaluation should be completed at the 160 day to allow time for approval, the review meeting and employee acknowledgement.

Step 1 of 17 – Employee Self Service

Sign in to [UTShare](#). You will be asked to authenticate yourself.

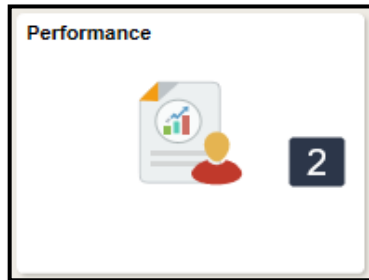
Step 2 of 17 – Employee Self Service

Select the **Employee Service** option from the dropdown within the PeopleSoft homepage.



Step 3 of 17 – Performance Tile

Select the **Performance** tile.



Step 4 of 17 – My Current Documents

Any current performance documents will appear under **My Current Documents**.

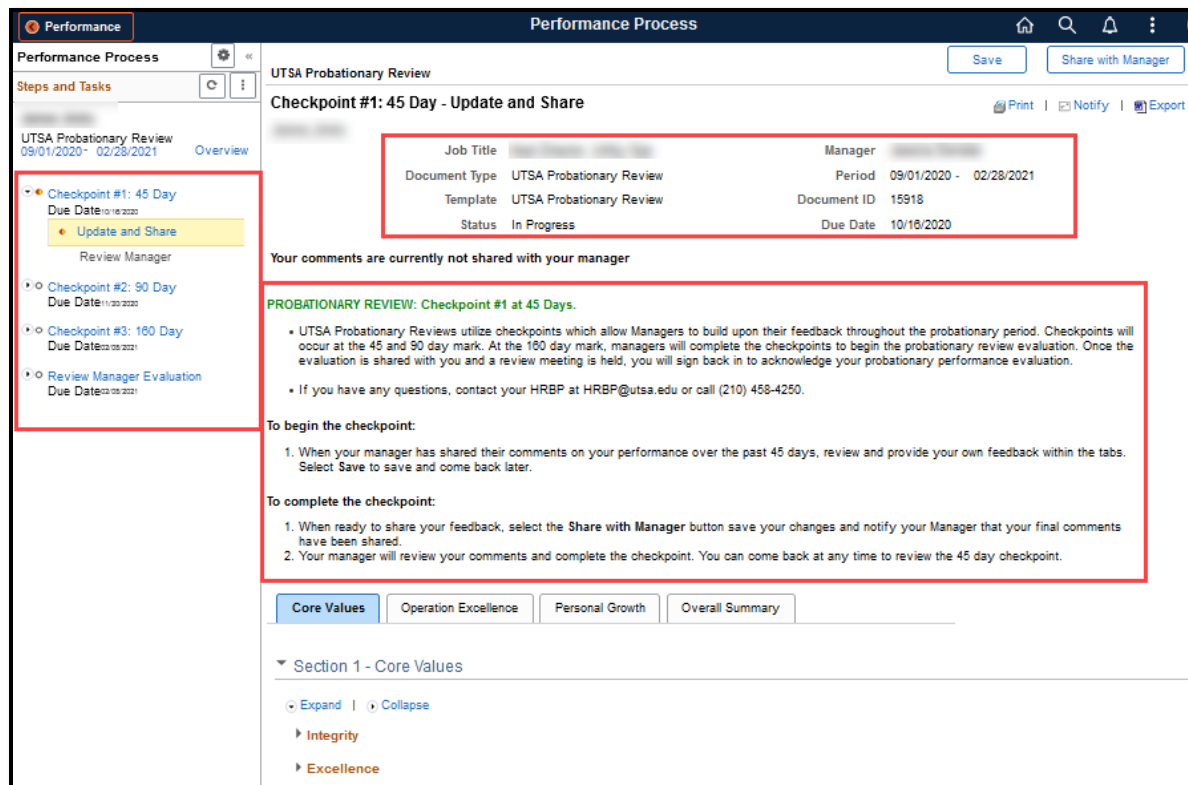
Select **UTSA Probationary Review** to continue. The evaluation status is currently in *Track Progress-Checkpoint #1: 45 Day* and will update as you continue throughout your probationary period.

Performance		Performance		
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My Historical Documents				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 Probationary Review	Track Progress - Checkpoint #1: 45 Day	09/01/2020 02/28/2021	10/16/2020	>

Step 5 of 17 – Review and Verify Information

Once the document is opened, you can view the overall document information, the checkpoints and due dates and the document’s instructions. The document instructions will provide helpful reminders on what is expected and what to do next.

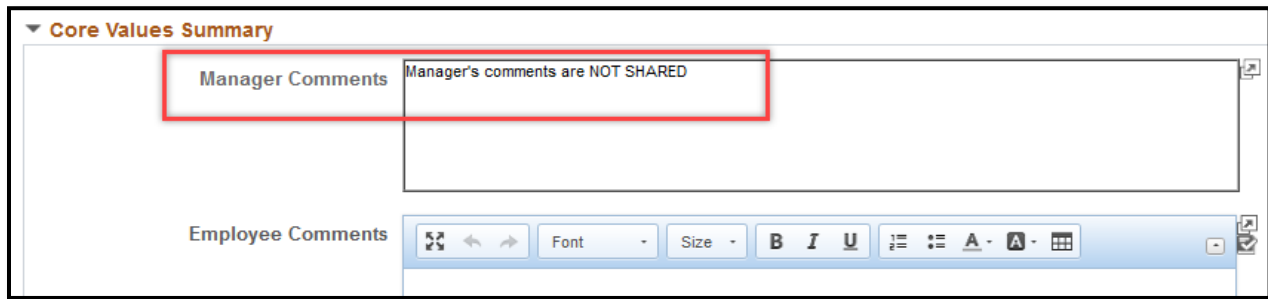
The far-left panel **Steps and Tasks** will keep you informed of the current and next steps. Use this to navigate through the sequence of steps.



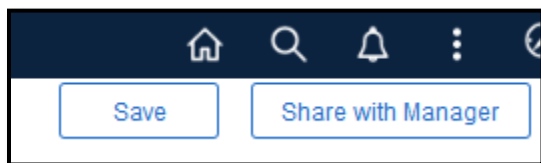
Step 6 of 17 – Reviewing Prior to Manager Sharing Comments

If you’ve received an email from your manager, their comments will be available to view. Until your manager shares their comments with you, this document will be blank.

You can begin to record your comments or wait until you can view your Manager’s feedback. If the Manager has not shared their comments, you will see the following message in each comment box:



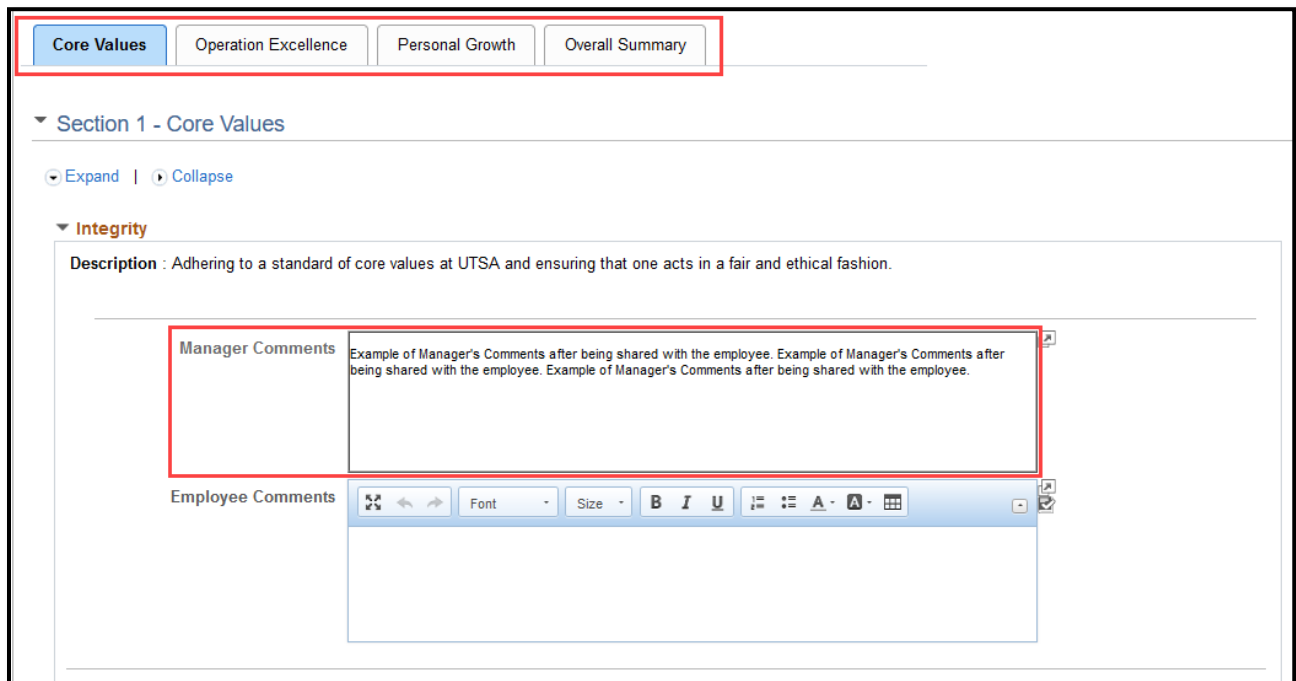
As an alternative, you can provide comments prior to your manager’s feedback. Do that by adding comments and selecting **Save / Share with Manager** (Step 8).



Step 7 of 17 – Manager Shared Comments, Ready to Review

You will receive an email when your manager shares their comments with you.

If you manager adds notes while their comments are shared, you will see the updated notes as long as your manager continues to share their document with you.



Step 8 of 17 – Add Comments and Feedback.

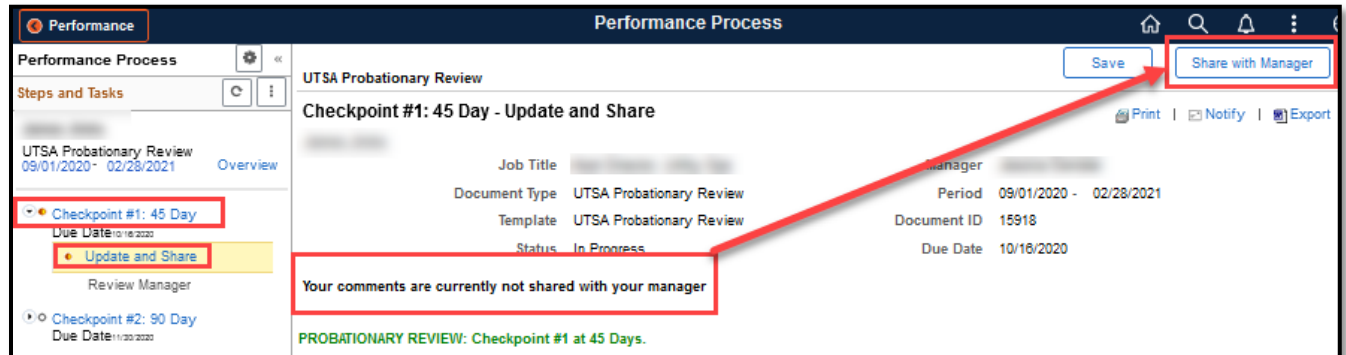
To begin, select the **Expand** link to view all factors under each tab.

Provide feedback within the **Employee Comments** boxes under each factor and summary as needed.

The screenshot displays the 'Core Values' section of the review interface. At the top, there are four tabs: 'Core Values', 'Operation Excellence', 'Personal Growth', and 'Overall Summary'. The 'Core Values' tab is selected and highlighted with a red box. Below the tabs, the section is titled 'Section 1 - Core Values'. Underneath, there are two buttons: 'Expand' (highlighted with a red box) and 'Collapse'. A list of core values is shown with expandable arrows: Integrity, Excellence, Inclusiveness, Respect, Collaboration, and Innovation. Below this list is the 'Core Values Summary' section. It contains a 'Manager Comments' box with the text 'Example of Manager's Comments after being shared with the employee.' and a 'Employee Comments' box. The 'Employee Comments' box is highlighted with a red box and includes a rich text editor toolbar with options for font, size, bold, italic, underline, bulleted list, numbered list, text color, and background color.

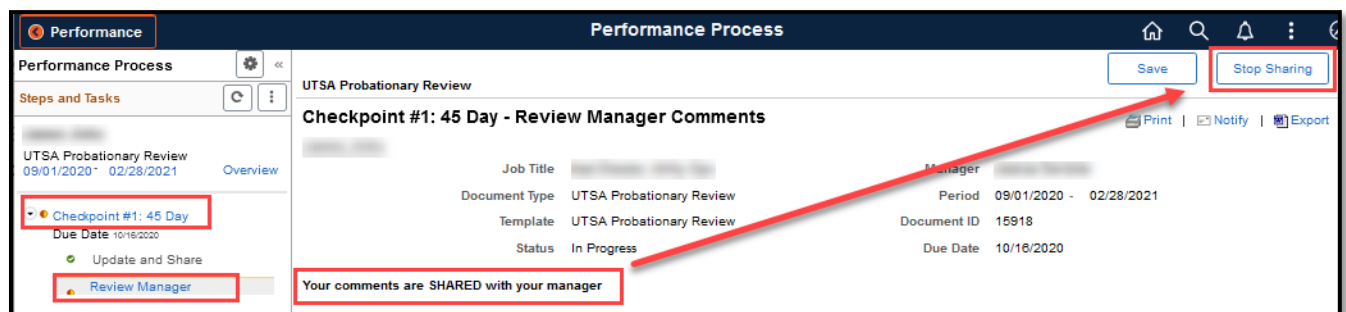
Step 9 of 17 – Share with Manager

You'll notice that while your comments are not shared, you have an action button of **Save / Share with Manager** and also a status at the top of the document that will always let you know whether your comments are shared or private.



Once comments shared, the status changes and you now have the ability to **Stop Sharing** as needed.

Notice how the far-left task panel has been updated to a new *Review Manager* step.



Step 10 of 17 – Checkpoint #1 Review Meeting

Once your comments are shared with your manager, they will reach out to schedule a review meeting.

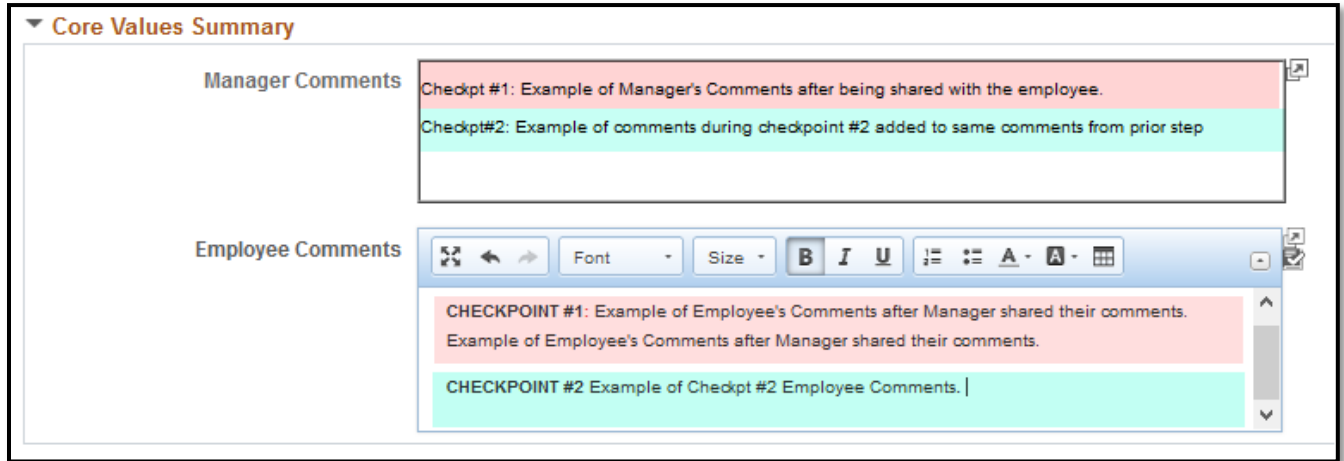
Step 11 of 17 – Checkpoint #1 at 45 Days Complete

After review meeting held and any final feedback has been recorded and shared, your Manager will complete the checkpoint. You'll receive a confirmation email once that is done.

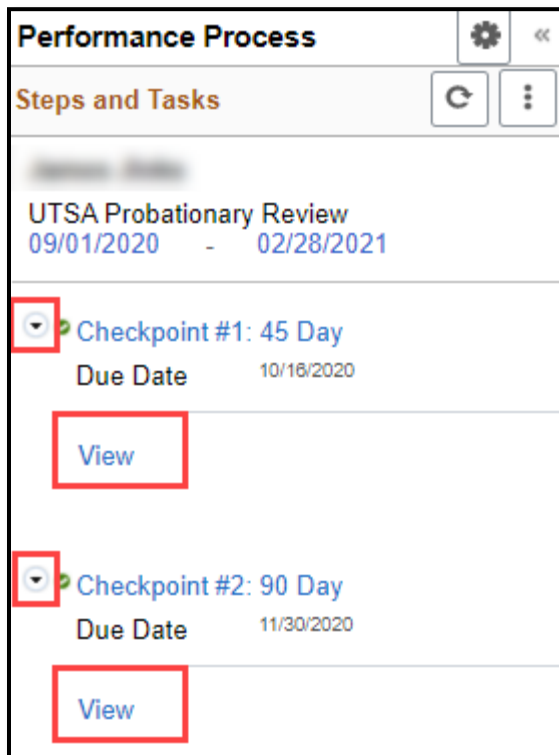
No further action is required until the next checkpoint at 90 Days but you do have the ability to add and save notes until the next checkpoint occurs.

Step 12 of 17 – Checkpoint #2 at 90 Days

Checkpoint #2 will be an exact repetition of Checkpoint #1, Steps 1 – 11. The only difference is that the comments from Checkpoint #1 are automatically added to Checkpoint #2.



You can simply add more comments, separate your comments by colored font or bullet points to differentiate between Checkpoint #1 and #2, or delete everything and start fresh. The comments for Checkpoint#1 will always be separate and available to view by expanding the Checkpoints steps within the document and selecting *View*.



Step 13 of 17 – Checkpoint #3 at 160 Days

Checkpoint #3 and the final Probationary Review are combined. Therefore, you will not provide your final feedback until after your manager completes the 3rd Checkpoint and the Manager’ Evaluation.

However, the manager does have the option of obtaining your feedback prior to the evaluation (to mimic the ability to provide a self-evaluation). If they choose to do so, you will receive the same email as Checkpoints #1 & #2 to alert you that your manager prefers your feedback prior to them completing the final evaluation.

When your manager completes the Checkpoint and their evaluation of your probationary performance, it will be routed for review to your Next Level Supervisor. Once reviewed, your manager will share their final evaluation with you to include final comments and an overall rating.

Step 14 of 17 – Probationary Performance Review Meeting

You will receive an email when the final evaluation has been shared with you. Your manager will contact you to schedule a review meeting.

Once meeting complete, you will sign in to provide your acknowledgement of the review and that a review meeting was held. You will be given the opportunity to provide any final comments or thoughts within the **EE Acknowledgement** tab.

Step 15 of 17 – Employee Acknowledgment

Follow steps 1 – 4 to return to the documents. Select the **Pending Acknowledgment** document.

My Current Documents			
Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Probationary Review	Pending Acknowledgement	09/01/2020 02/28/2021	02/08/2021 >

Step 16 of 17 – Employee Acknowledgment (Continuation)

Add your final comments and then select **Acknowledge** that you and your Manager have reviewed the document.

The screenshot displays the 'Performance Process' interface for a 'UTSA Probationary Review'. The main content area is titled 'Manager Evaluation - Acknowledge' and includes the following details:

- Manager: James Jinks
- Job Title: [Redacted]
- Document Type: UTSA Probationary Review
- Period: 09/01/2020 - 02/28/2021
- Template: UTSA Probationary Review
- Document ID: 15918
- Status: Pending Acknowledgement
- Due Date: 02/08/2021

Instructions: This document is currently waiting for your acknowledgment. Provide any final feedback in the *EE Acknowledgement* tab. Then select the **Acknowledge** button to confirm that you and your manager have discussed this document.

Navigation tabs include: Core Values, Operation Excellence, Personal Growth, Overall Summary, **EE Acknowledgement**, and Privacy Notice.

Section 5 - Employee Acknowledgement

Prior to the employee acknowledging the probationary review, they may provide comments below. By acknowledging this probationary appraisal, the Employee confirms that a meeting was held to review and discuss the appraisal.

Employee Acknowledgement Summary

Employee Comments [Text Editor]

Step 17 of 17 – Probationary Review Complete

Once Acknowledged, the document will immediately close and email you and your manager a receipt of finalization. You can find the document within your **Performance Tile > Historical Documents** where you can review each of the checkpoints and final evaluation in the future.

The screenshot shows the 'Employee Self Service' interface under the 'Performance' section for James Jinks. On the left, there are navigation tabs: 'My Current Documents', 'My Historical Documents' (highlighted), 'Evaluations of Others', and 'Historical Evaluations of Others'. The main area displays 'My Historical Documents' with a table:

Document Type	Document Status	Period Begin / Period End
UTSA Probationary Review	Completed	09/01/2020 - 02/28/2021

The screenshot shows the 'Performance Process' page for a 'UTSA Probationary Review' document. The main heading is 'Manager Evaluation - Completed' for James Jinks. Key details include:

- Job Title: Asst Director, Utility Ops
- Manager: James Jinks
- Document Type: UTSA Probationary Review
- Period: 09/01/2020 - 02/28/2021
- Template: UTSA Probationary Review
- Document ID: 15918
- Status: Completed
- Due Date: 02/08/2021

Below the details, there is a message: "The document status is Complete. No further action is required but if you have any questions, please contact HR at 210-458-4250 or at one of the email addresses below." and contact information for Annual Evaluations (HR@utsa.edu) and Probationary Reviews (HRBP@utsa.edu). Navigation tabs include 'Core Values', 'Operation Excellence', 'Personal Growth', 'Overall Summary', 'EE Acknowledgement', and 'Privacy Notice'. The 'Section 1 - Core Values' is expanded, showing a message about the organization's values and a link to 'Integrity'.