



People Admin Performance Management User Guide

HSC New Team Member Program
2020 End of Year Evaluation



Online Training Resources

Performance Management recorded training is available on [UNT World Learning](#) (UWL). Click on the Learning Library then scroll down to the Human Resources section. Search for institution specific training

- *UNT HSC - PeopleAdmin Performance Evaluation Training - Recorded Webinar*

Additional information can be found at

<https://hr.untsystem.edu/performance-management>



How to Access Performance Module

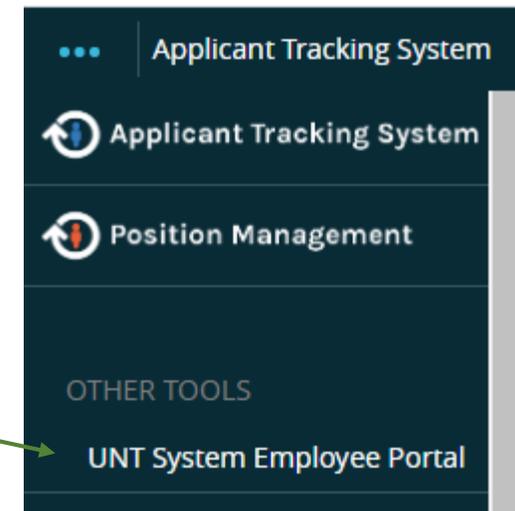
- Via employee portal link: <https://my.untsystem.edu>; go to PeopleAdmin section and select the link for Performance Management
- Or go to: <https://jobs.untsystem.edu/portal>
- Log-in with EUID and Password
- All supervisors and employees can access system



How to Access Performance Module (cont.)



You may also access the employee portal through the PeopleAdmin System. When in PeopleAdmin, simply select UNT System Employee Portal after clicking on the three dots in the top left corner.





Navigation

Go to UNT System HR Site [PeopleAdmin](#)

Home **13** Performance Progress Notes 7 Hello, [Log Out](#)

Welcome to the Employee Portal,

[My Reviews](#)
[My Employees' Reviews](#)

Your Action Items

Start typing to search

Item	Description	Due Date	Status
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Supervisor Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available

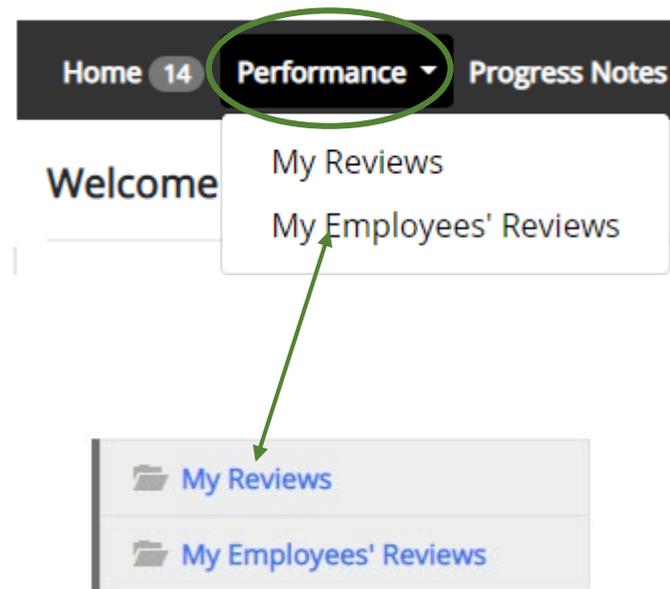
Showing 1 to 13 of 13 entries

The home screen gives you a list of items that require you to take an action, this will include tasks related to your own evaluation and for supervisors, this will also include tasks for those you supervise.

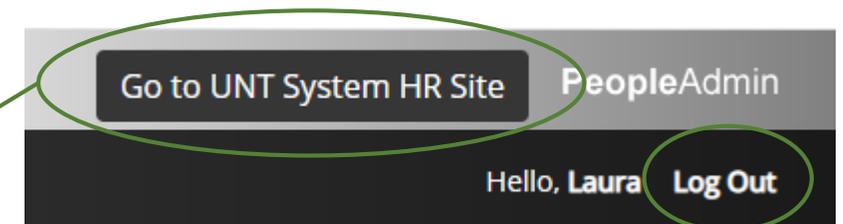


Navigation (cont.)

The Performance button repeats the My Reviews and My Employees' Reviews links found on the left side of the screen



Clicking the Go to UNT System HR Site takes the user out of the employee portal and back to the Applicant Tracking System or Performance Management module.



The Log Out button ends the PeopleAdmin session requiring the user to sign in once more in order to access the system.



Navigation (cont.)

Employee's Name

My Reviews

Program
All Programs

Reporting org unit
All Org Units

Program Type
All Types

Open/Completed
All

[My Reviews](#)

[My Employees' Reviews](#)

Program	Progress	Type	Score	Review Status	Last Update	Action
UNTHSC New Team Member Process	<div style="width: 100%;"></div>	Annual	-	Open	May 04, 2020 05:34	View Review
UNTHSC New Team Member Process (Multi-rater test)	<div style="width: 100%;"></div>	Annual	-	Open	May 11, 2020 15:28	View Review

Showing 1 to 2 of 2 entries

Selecting the My Reviews link allows employees to view all evaluations that have been assigned to them, as well as the status of each.

Also, this is where employees will be able to view evaluations which have already been completed. Simply click on the View Report link to access them.



Navigation (cont.)

Supervisors may also use the available search filters in order to more quickly locate employee evaluations

Reviews Dashboard

My Reviews
My Employees' Reviews

Reset Program: None Employee Name Group by: Program Advanced

All Reviews 16 Not Started 0 In Process 16 Complete 0 Overdue 0 Disputed 0

Last name	First Name	Anniversary Date	Progress	Program	Score
UNTHSC New Team Member Process 8					
Amanda	Amanda	2019-03-18	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated
Amanda	Amanda	2003-09-01	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated
Amanda	Amanda	2019-08-20	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated
Amanda	Amanda	2016-03-01	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated
Amanda	Amanda	2003-09-01	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated
Amanda	Amanda	2017-08-21	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated
Amanda	Amanda	2008-08-18	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated
Amanda	Amanda	2010-03-15	0/4 [1] [] [] []	UNTHSC New Team Member Process	Unrated

Clicking on the My Employee's Reviews link takes you to the Reviews Dashboard which lists all employees, along with what stage of the employee evaluation they are currently on.

The available pre-filtered tabs are:

1. All Reviews
2. Not Started
3. In Process
4. Complete
5. Overdue

Please note that the Disputed tab will not be used

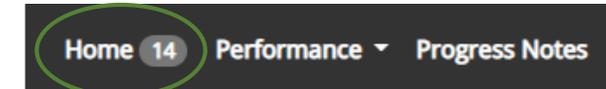


UNTHSC New Team Member Program Steps

1. Supervisor Creates Plan – Supervisor enters an Objective Statement and creates an Objective Plan.
2. Supervisor Evaluation – Supervisor provides feedback and rates the employee's performance.
3. Review Meeting – Supervisor indicates that they have met with the employee and reviewed the evaluation.
4. Employee Acknowledges Evaluation - Employee acknowledges that they have received an evaluation.



Beginning the Review Process



Your Action Items

Item	Description
UNTHSC New Team Member Process for Alyson	Supervisor Creates Plan
UNTHSC New Team Member Process for Amanda	Supervisor Creates Plan
UNTHSC New Team Member Process for Christina	Supervisor Creates Plan
UNTHSC New Team Member Process for Deborah	Supervisor Creates Plan

All Reviews	Not Started	In Process	Complete	Overdue	Disputed
Last name	First Name	Anniversary Date	Progress		
UNTHSC New Team Member Process 41					
	John	2003-09-01	0/4	1	
	Rachel	2018-03-01	0/4	1	
	Allison	2019-07-01	0/4	1	
	Michael	2012-09-01	0/4	1	

To begin the evaluation process, the supervisor will select the employee's name from the list. The list of employees can be accessed from either the Home page or the My Employees' Reviews page.



Supervisor Creates Plan

Go to UNT System HR Site [PeopleAdmin](#)

Home 8 Performance ▾ Progress Notes Hello, **Laura** [Log Out](#)

Maria

Supervisor: Laura
Position Description: [Custodian](#)
Department: UNT Health Science Center

[Overview](#)

[Plan](#)

[Supervisor Evaluation](#)

[Multi-rater Feedback ▾](#)

[History](#)

[My Reviews](#)

[My Employees' Reviews](#)

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan 	Laura Supervisor			
2	Supervisor Evaluation	Laura Supervisor			
3	Review Meeting	Laura Supervisor			
4	Employee Acknowledges Evaluation	Maria I			

UNTHSC New Team Member Process (Multi-rater test)
Review Status: Open
Evaluation Type: Annual
Program Timeframe: 01/01/20 to -
Last Updated: May 11, 2020 15:43
Co-reviewer: [Add Co-reviewer](#)

Select the first task link to begin the process to create the plan.



Supervisor Creates Plan (cont.)

Plan for Deborah Actions ▾

Instruction:

- Please enter an Objective Statement and Objective Plan for the new team member.
- Up to three Objective Statements/Plans can be entered. To add additional Objective Statements/Plans, select Add Entry.
- Select Save Draft if you wish to review or edit information before finalizing.
- Select Complete when all entries have been completed.

Required fields are indicated with an asterisk (*). Check spelling

Objectives
Maximum of three entries

* Objective Statement

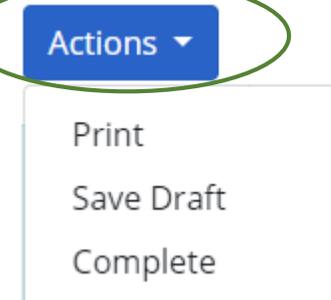
* Objective Plan

Remove Entry?

Add Entry

Save Draft Complete

Select “Save Draft” if you wish to review or edit information before finalizing or select “Complete” when all entries have been entered. This can be done by clicking the buttons at the bottom of the page or “Actions” drop down menu. You may also print pages by selecting the Print option from the Actions drop down menu.



Enter an Objective Statement and Objective Plan for the review period. For additional objectives, click the “Add Entry” button at the bottom of the page. A maximum of three Objective Statements/Plans may be entered.



Supervisor Evaluation

Overview
Plan
Supervisor Evaluation
Multi-rater Feedback ▾
Approvals & Acknowledgements
History
My Reviews
My Employees' Reviews

To access the task list and begin the next step, click on the “Overview” link found on the left side menu.

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan	Kareem Crosdale Supervisor		2020-05-07	
2	Supervisor Evaluation	Supervisor's Name Supervisor			
3	Review Meeting	Supervisor's Name Supervisor			
4	Employee Acknowledges Evaluation	Employee's Name			

Select the second task link to begin the Supervisor Evaluation.



Supervisor Evaluation (cont.)

Supervisor Evaluation

Instructions:

- Please review performance on Objectives and Plans. Scroll to the Delivered Key Results Feedback section of the page. Enter Feedback on performance and enter Development needs in the appropriate sections.
- Enter the Overall Rating for performance of the Objectives and Plans. Select "On Track" or "Progress Needed".
- Select Save Draft if you wish to review or edit information before finalizing.
- If you would like to add attachments, please select the Attachments link.
- Select Complete when all actions have been completed.

New Team Member Evaluation

Required fields are indicated with an asterisk (*).

Delivered Key Results

Objective Statement:
Employee will be able to process departmental transactions with 90% or more accuracy.

Objective Plan:
Employee will create an individual process plan and and make adjustments as necessary, the plan must be presented at check-ins.

Delivered Key Results Feedback

Example of "On Track" behaviors:

Delivered key results for all expected objectives and tasks.
Stayed focused on tasks and assignments to achieve key results.
Used time efficiently to achieve key results.
Was receptive to constructive critical feedback and implemented feedback to improve performance.

* Feedback - Provide feedback on progress toward new team member plan

* Development - Provide feedback on opportunities for growth and improvement

Overall Rating

* Overall Rating - Select one from drop-down menu

Please select



In the Supervisor Evaluation, the Supervisor will insert feedback on the progress an employee is making towards delivering the key results created in the plan, indicate opportunities for the employee to grow and/or improve, and give an overall rating of the employee's performance. Select "Save Draft" to come back to the evaluation or "Complete" once done.

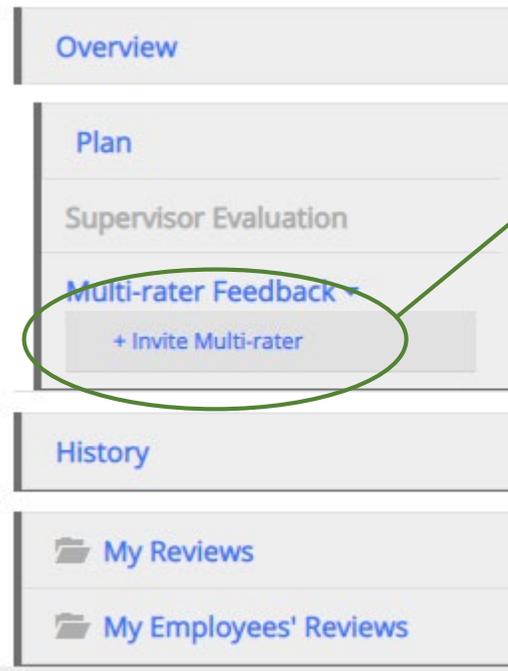


Additional Reviewers

- The system allows for feedback from other UNT World employees
 - Co-Reviewer – Use this function if another reviewer should have full feedback capabilities to the employee's evaluation. This might be used for someone who has a split reporting relationship or someone who recently transferred to a new job during the last year. The supervisor and co-reviewer will need to discuss who will be responsible for completion and submission of the evaluation steps.
 - Multi-Rater – Use this function to invite feedback from other UNT World employees (customers, peers, etc.) on the employee's performance. The multi-rater has no access to read or edit the employee's evaluation.



Multi-Rater



To add a multi-rater/additional evaluator, the supervisor will click on “Multi-rater Feedback” in the left menu and select the “Invite Multi-rater” link.

Enter the name of the person or persons to be invited, check the box by their name and click the “Save” button.

Select Multi Raters

Begin typing a name or login to search available users. Then select users from the list.

<input type="text" value="Kareem"/>	<input type="text" value="Crosdale"/>	<input type="text" value="Username"/>		
<input checked="" type="checkbox"/>	Name	Login	Department	Supervisor
<input checked="" type="checkbox"/>	Kareem Crosdale		SYS	Melinda Lilly

The Multi-rater will receive an email notifying them of the request, and they can access the multi-rater form through their performance portal Home page.



Multi-Rater (cont.)

The screenshot shows the UNT System Employee Portal interface. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes'. A user greeting 'Hello, Kareem' is visible on the right. Below the navigation bar, a welcome message reads 'Welcome to the Employee Portal, Kareem'. On the left, there is a sidebar with 'My Reviews' and 'My Multi Rater Feedback' links. The main content area is titled 'Your Action Items' and contains a search input field with the placeholder text 'start typing to search'. Below the search field is a table with the following data:

Item	Description	Due Date	Status
UNTHSC Supervisor Year 1 (Multi-rater test) for Rebel	Multi-Rater Feedback	n/a	Available

Below the table, it indicates 'Showing 1 to 1 of 1 entries'.

Once a Multi-rater has been added to an evaluation, the Multi-rater feedback will be listed as an action item and can be found on the Home page when the Multi-rater logs into the portal.



Multi-Rater (cont.)

UNT SYSTEM Home Performance Progress Notes Hello, Kareem Log Out

Multi Rater Feedback for Actions

Supervisor:
Position Description:
Department: UNT Health Science Center

Peer Review

- My Reviews
- My Multi Rater Feedback

Instructions:

- Enter Comments relating to the evaluated employee's performance. Information is provided below to guide the type of feedback requested. All comments can be included in the provided comments box. It is not necessary to add additional entries.
- Please do not select the Remove Entry checkbox. If you have no comments, please enter "No comments on performance."
- Select Save Draft if you wish to review or edit information before finalizing.
- Select Complete when all actions have been completed.

Additional Reviewer Attachments

Required fields are indicated with an asterisk (*). [Check spelling](#)

Additional Reviewer

Please provide feedback regarding the evaluated employee's performance during the preceding year relating to one or more of the following categories: produced results, customer service, business knowledge, leadership, teamwork, stakeholder relationships, change management, accountability, and/or vision.

* Comments

Remove Entry?

Add Entry Save Draft Complete

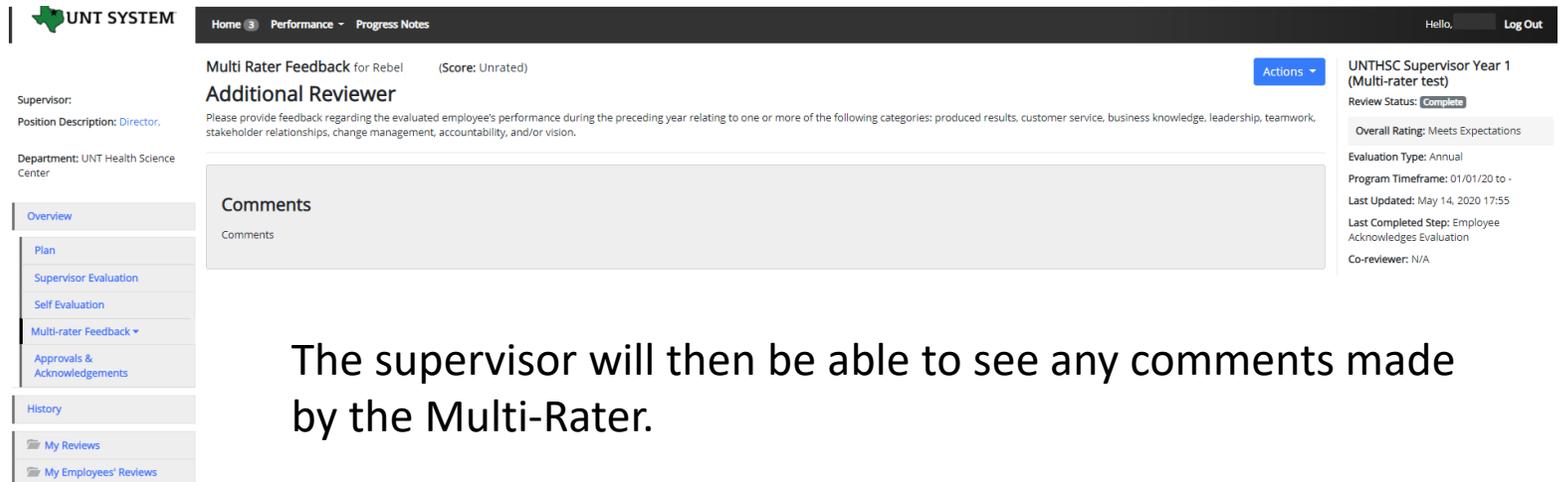
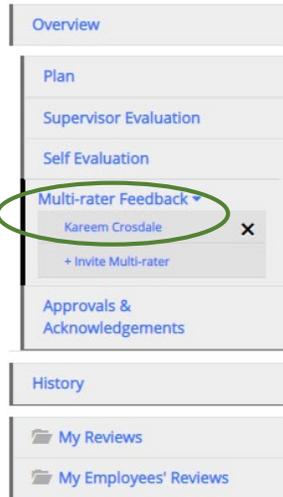
UNTHSC Supervisor Year 1 (Multi-rater test)
Review Status: Open
Evaluation Type: Annual
Program Timeframe: 01/01/20 to -
Last Updated: May 14, 2020 17:41
Last Completed Step: Supervisor Evaluation

The Multi-rater will enter all comments/feedback within the available "Comments" box, there is no need to add a new entry. They will then have the option of saving as a draft for further review using the "Save Draft" link, or they may select "Complete" to conclude the multi-rater feedback.



Multi-Rater – Supervisor’s View

To view the Multi-Rater feedback, the supervisor will select the employee’s name from the left menu under the Multi-Rater feedback drop-down list.



The supervisor will then be able to see any comments made by the Multi-Rater.

Multi-rater comments are only visible to the supervisor and the multi-rater, employees are not able to access these comments.



Co-reviewer

Adding a co-reviewer allows the supervisor to identify another individual who can perform all the same steps as the supervisor.

Select Co-reviewer

Begin typing a name or login to search available users. Then select a user from the list.

<input type="text" value="Kareem"/>	<input type="text" value="Crosdale"/>	<input type="text" value="Username"/>		
<input checked="" type="checkbox"/>	Name	Login	Department	Supervisor
<input type="radio"/>	Kareem Crosdale		SYS	Melinda Lilly

Cancel

Save

To add a Co-reviewer, the supervisor will click on the “Add Co-reviewer” link on the right panel.

A Co-reviewer can be added at any point prior to the completion of the Supervisor Evaluation.

It must also be noted that the Co-reviewer and the supervisor will be sharing the forms allowing only one of them to make the final submission.

UNTHSC Non-Manager Year 1
(Multi-rater test)

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 01/01/20 to -

Last Updated: May 14, 2020 11:47

Last Completed Step: Self Evaluation

Co-reviewer: [Add Co-reviewer](#)



Progress Notes

The screenshot shows a web application interface for 'Progress Notes'. At the top, there is a dark navigation bar with 'Home', 'Performance', and 'Progress Notes' (circled in green). On the right of this bar, it says 'Hello, [user icon] Log Out'. Below the navigation bar, the page title is 'Progress Notes'. To the right of the title is a blue button labeled 'Create Progress Note' (circled in green). Below the title is a search bar with a magnifying glass icon and a green 'Advanced' dropdown menu. Underneath is a table with columns: 'Title', 'Shared', 'Program', 'Date', 'Type', 'Author', 'Employee', and a link icon. Below the table is a pagination bar with 'Previous', '1' (highlighted), and 'Next'.

Progress notes can be added at any time during the evaluation process and allows the supervisor as well as the employee to document achievements and or important happenings throughout the year.

To add a progress note, click on the “Progress Notes” link in the main menu, then click the “Create Progress Note” button.

It is highly encouraged that supervisors add progress notes detailing mid-year and year-end conversations. Notes should include a brief overview of the progress the individual has made towards their goals.



Progress Notes (cont.)

New Progress Note ×

Program (optional)

UNTHSC New Team Member Process

Employee*

-- choose an option --

Type*

Original Progress Note

Title*

Recognition of observed behaviors

Comments*

Employee has been able to meet all deadlines which have been set and is being tasked with higher level responsibilities.

Share this Progress Note

Attachment

Create Cancel

Progress notes may either be shared or they may be for use only by the employee or supervisor who entered them. To share a progress note, simply click the share button.

Supporting documents may also be added to progress notes by clicking the “Attachment” link.

Click “Create” in order to add the progress note.



Progress Notes (cont.)

Title ↕	Shared ↕	Program ↕	Date ▾	Type ↕	Author ↕	Employee ↕
Recognition of observed behaviors	<i>private</i>	UNTHSC New Team Member Process	05/07/2020	Original Progress Note	you	you

Previous 1 Next

Clicking on the “Progress Notes” link also allows you to view any progress note created by or shared with the individual.

Title ↕	Shared ↕	Program ↕	Date ▾	Type ↕	Author ↕	Employee ↕
Recognition of observed behaviors	<i>shared</i>	UNTHSC New Team Member Process	05/07/2020	Original Progress Note	you	you

Previous 1 Next



Review Meeting

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan	Kareem Crosdale Supervisor		2020-05-07	
2	Supervisor Evaluation	Kareem Crosdale Supervisor		2020-05-07	
3	Review Meeting	Kareem Crosdale Supervisor			
4	Employee Acknowledges Evaluation	Employee's Name			



The Supervisors selects the third task link when ready to meet with the employee to discuss the evaluation.



Review Meeting (cont.)

Review Meeting

Instructions:

Schedule time to meet and discuss the evaluation with the employee. If the evaluation score is "Progress Needed" please consult with Campus HR before meeting with the employee. Once the review is complete, select Complete.

[↗ Complete](#)

Before clicking on the “Complete” button, the supervisor must schedule time with the employee to review and discuss the Supervisor Evaluation. If the overall evaluation score is “Does not Meet Expectations”, a Campus HR representative must be consulted before meeting with the employee.



Employee Acknowledges Evaluation

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan	Kareem Crosdale Supervisor		2020-05-07	
2	Supervisor Evaluation	Kareem Crosdale Supervisor		2020-05-07	
3	Review Meeting	Kareem Crosdale Supervisor		2020-05-07	
4	Employee Acknowledges Evaluation				



UNTHSC New Team Member Process

Review Status: Open

Overall Rating: On Track

Evaluation Type: Annual

Program Timeframe: 01/01/20 to -

Last Updated: May 07, 2020 12:58

Last Completed Step: Review Meeting

Co-reviewer: N/A

The employee will select the fourth task link to acknowledge and complete the evaluation.



Employee Acknowledges Evaluation (cont.)

The employee is able to review the evaluation again that was done by the supervisor.

Supervisor Evaluation for

Actions ▾

Instructions: Scroll down the page to review the Feedback, Development and Overall Rating sections of the form. Scroll to the bottom of the page to add comments if desired, and select Acknowledge to complete the evaluation. Selecting Acknowledge indicates receipt of the evaluation.

Delivered Key Results

Objective Statement:

Employee will be able to process departmental transactions with 90% or more accuracy.

Objective Plan:

Employee will create an individual process plan and and make adjustments as necessary, the plan must be presented at check-ins.

Delivered Key Results Feedback

Example of "On Track" behaviors:

Delivered key results for all expected objectives and tasks.

Stayed focused on tasks and assignments to achieve key results.

Used time efficiently to achieve key results.

Was receptive to constructive critical feedback and implemented feedback to improve performance.



Employee Acknowledges Evaluation (cont.)

Feedback - Provide feedback on progress toward new team member plan

The employee has done a great job over the period.

Development - Provide feedback on opportunities for growth and improvement

There are several conferences coming up that the employee will be enrolled in.

Overall Rating

Overall Rating - Select one from drop-down menu

On Track

Comment

 [Check spelling](#)

[Return to Supervisor](#)

[Acknowledge](#)

Before acknowledging receipt of the evaluation, the employee is able to make a comment about the evaluation. Select "Acknowledge" once complete.



Evaluation Completed

Welcome to the Employee Portal,

Your Action Items

Item	Description
You don't have any Action items.	

Once an employee acknowledges their evaluation, the evaluation cycle is complete and the employee home screen should show no further action needed.



Appendix



Features of Performance Module

- Supervisors can access performance review information for all direct reports in one location, including status of all evaluation steps.
- Second-level and higher managers (department heads, deans, VPs, etc.) can access review information for all employees within their organizational structure.
- Automatic email notifications will be sent via email as program tasks open, become due, or are overdue.
- Progress notes and attachments can be easily stored within the system.



New Team Member Rating Structure

- **On Track**– Performance meets established objectives and fully completes normal job requirements.
- **Progress Needed**– Performance of established objectives is inconsistent; meets some of the minimum requirements of the position but needs to improve performance in other areas.

If an employee receives an overall score of “Progress Needed” please meet with Campus HR before conducting employee meeting.



E-mail Notification Feature

- E-mail notifications will be sent for the following actions:
 - A program step opens for completion
 - A due date is within 7 days
 - A due date is today
 - A program step is overdue
- E-mails will include information on what steps are open and will provide a link to the system.
- System generated e-mails will only be sent to supervisors and employees. The system should send no more than one message per day.

Hello Melinda Lilly,

There are Performance Management action item(s) that need your attention within PeopleAdmin.

Overdue Action Item - 3

The following item(s) are now overdue. Please complete overdue action item(s) as soon as possible.

- Supervisor Creates Plan (Due 02/13/2020)
- Supervisor Creates Plan (Due 02/13/2020)
- Supervisor Creates Plan (Due 02/13/2020)

[View your Action item in the UNT System Staff Evaluation Portal »](#)

Please log into the Performance Management portal and complete your action items. Contact your Campus HR team if you have any questions.



Contacts

- HR Compensation and Performance Management Team
 - System issues: log-in, employees not listed, navigation issues, re-open a task
 - Email: HRComp@untsystem.edu
 - Phone: 1-855-878-7650, option 6
- HSC Campus HR Team
 - Performance management concerns, discussion about unsatisfactory ratings
 - Email: HSC.HR@untsystem.edu
 - Phone: 817-735-2690