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
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.
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.
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.
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.
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

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

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.
Supervisor Evaluation

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

Select the second task link to begin the Supervisor Evaluation.
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.
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.

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.
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.
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.

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.
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 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.)

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Shared</th>
<th>Program</th>
<th>Date</th>
<th>Type</th>
<th>Author</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recognition of observed behaviors</td>
<td>private</td>
<td>UNTHSC New Team Member Process</td>
<td>05/07/2020</td>
<td>Original Progress Note</td>
<td>you</td>
<td>you</td>
</tr>
<tr>
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</table>
The Supervisors selects the third task link when ready to meet with the employee to discuss the evaluation.
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.
The employee will select the fourth task link to acknowledge and complete the evaluation.
The employee is able to review the evaluation again that was done by the supervisor.
Before acknowledging receipt of the evaluation, the employee is able to make a comment about the evaluation. Select “Acknowledge” once complete.

<table>
<thead>
<tr>
<th>Feedback - Provide feedback on progress toward new team member plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>The employee has done a great job over the period.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Development - Provide feedback on opportunities for growth and improvement</th>
</tr>
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<tbody>
<tr>
<td>There are several conferences coming up that the employee will be enrolled in.</td>
</tr>
</tbody>
</table>

**Overall Rating**

**Overall Rating - Select one from drop-down menu**

- On Track

**Comment**

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