



# PeopleAdmin Performance Management User Guide

HSC Supervisor and Non-Supervisor Program  
2020 End of Year Evaluation Program



## 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

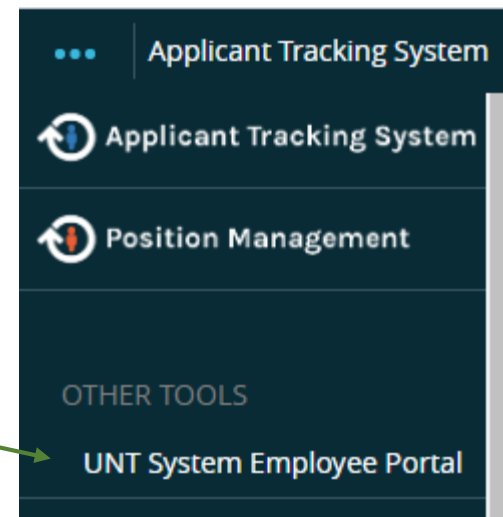
- Via employee portal link: <https://my.untsystem.edu>; go to PeopleAdmin section and select the link for Performance Management
- Or go to: <https://jobs.untsystem.edu/portal>
- Log-in with EUID and Password
- All supervisors and employees can access system



## How to Access Performance Module (cont.)

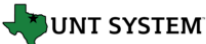


You may also access the employee portal through the PeopleAdmin System. When in PeopleAdmin, simply select UNT System Employee Portal after clicking on the three dots in the top left corner.





# Navigation



Home 13

Performance

Progress Notes 1

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

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
<a href="#">UNTHSC New Team Member Process for</a>	Supervisor Creates Plan	n/a	Available
<a href="#">UNTHSC New Team Member Process for</a>	Supervisor Creates Plan	n/a	Available
<a href="#">UNTHSC New Team Member Process for</a>	Supervisor Creates Plan	n/a	Available
<a href="#">UNTHSC New Team Member Process for</a>	Supervisor Creates Plan	n/a	Available
<a href="#">UNTHSC New Team Member Process for</a>	Supervisor Creates Plan	n/a	Available
<a href="#">UNTHSC New Team Member Process for</a>	Supervisor Creates Plan	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 for</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 for</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 for</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 for</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 for</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 for</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Supervisor Year 1 for</a>	Supervisor Sets Objectives & Key Results	n/a	Available

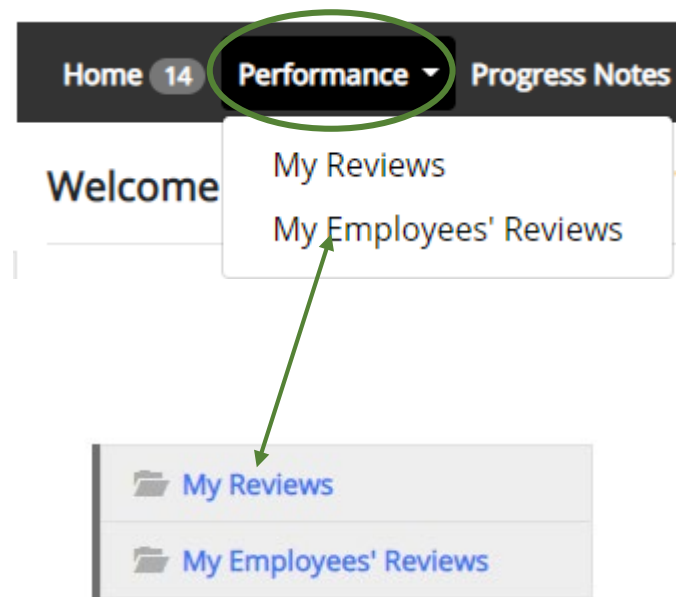
Showing 1 to 13 of 13 entries

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.

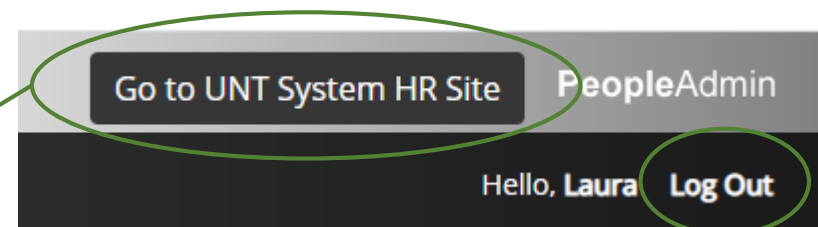


## Navigation (cont.)

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



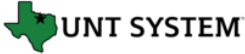
Clicking the Go to UNT System HR Site takes the user out of the employee portal and back to the Applicant Tracking System or Performance Management module.



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



# Navigation (cont.)



Patricia

Program  
All Programs ▾

Reporting org unit  
All Org Units ▾

Program Type  
All Types ▾

Open/Completed  
All ▾

My Reviews

My Employees' Reviews

Go to UNT System HR Site

PeopleAdmin

Home 2 Performance ▾ Progress Notes

Hello, Patricia Log Out

### My Reviews

Program	Progress	Type	Score	Review Status	Last Update	Action
<a href="#">UNTHSC New Team Member Process</a>	<div></div>	Annual	-	Cancelled	May 12, 2020 11:20	<a href="#">View Review</a>
<a href="#">UNTHSC Supervisor Year 1</a>	<div></div>	Annual	-	Cancelled	May 12, 2020 11:18	<a href="#">View Review</a>
<a href="#">UNTHSC Supervisor Year 1 (Multi-rater test)</a>	<div></div>	Annual	-	Open	May 12, 2020 04:22	<a href="#">View Review</a>

Showing 1 to 3 of 3 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.

This is also 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.)



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\*

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

Reviews Dashboard

Program:  Employee Name   Group by:

All Reviews 2 Not Started 0 In Process 2 Complete 0 Overdue 0 Disputed 0

Last name	First Name	Anniversary Date	Progress	Program	Score
UNTHSC Non-Manager Year 1 (Multi-rater test) 2					
	Monica	2003-09-01	0/6 <div><div>1</div><div></div><div></div><div></div><div></div><div></div></div>	UNTHSC Non-Manager Year 1 (Multi-rater test)	Unrated
	Belinda	2009-08-31	0/6 <div><div>1</div><div></div><div></div><div></div><div></div><div></div></div>	UNTHSC Non-Manager Year 1 (Multi-rater test)	Unrated

☐ Task Not Started / Unavailable

☒ Task Completed

☐ Task Open

☐ Task Disputed





# Beginning the Review Process

My Reviews

My Employees' Reviews

All Reviews 94

Not Started 0

In Process 94

Complete 0

Overdue 0

Disputed 0

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

Home 14 Performance Progress Notes

### Your Action Items

Start typing to search

Item	Description
UNTHSC Non-Manager Year 1 (Multi-rater test) for Belinda	Supervisor Sets Objectives & Key Results
UNTHSC Non-Manager Year 1 (Multi-rater test) for Monica	Supervisor Sets Objectives & Key Results

Showing 1 to 2 of 2 entries

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



# Steps of HSC Performance Evaluation Programs

(For Supervisors and Non-Supervisors starting on or before 1-1-20)

1. **Acknowledge Global Objectives** – employee reviews global objectives to initiate the employee end of year report
2. **Self Evaluation** – employee rates self on goals and objectives
3. **Supervisor Evaluation** – supervisor rates employee
4. **2<sup>nd</sup> Level Supervisor approval** – second level supervisor indicates agreement with the content of the evaluation
5. **End of Year Review meeting** – Supervisor and employee meet to review the supervisor evaluation
6. **Employee Acknowledges Evaluation** – employee acknowledges receipt of evaluation materials and score



## HSC Global Objectives

1. Delivered Quarterly Key Results (Summary Measure of Performance Checks-ins)
2. Solved Department Problems
3. Demonstrated Functional Knowledge and Skills
4. Demonstrated Service to Department Customers
5. Maintained a High Level of Trust with Department Customers
6. Behaved in a Collaborative Manner to Facilitate Department Success
7. Communicated Effectively with Others
8. Showed Initiative



# Employee Acknowledges Global Objectives



**Monica**  
Supervisor: Patricia  
Position Description: Operations  
  
Department: UNT Health Science Center

- Overview
- Plan
- Supervisor Evaluation
- Self Evaluation
- My Reviews

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Acknowledge Global Objectives	Monica			
2 Complete Self Evaluation	Monica			2020-07-20
3 Complete Supervisor Evaluation	Patricia, Supervisor			2020-07-27
4 Second Level Supervisor Approves Evaluation	Stephen, Reviewing Officer			
5 End of Year Review Meeting	Patricia, Supervisor			2020-07-31
6 Employee Acknowledges Evaluation	Monica			2020-08-05

UNT HSC Non-Supervisor Performance Evaluation Program (Year 1) (Revised)  
Review Status: Open  
Evaluation Type: Annual  
Program Timeframe: 05/01/20 to -  
Last Updated: June 05, 2020 14:40

Select the first task link to review and acknowledge the global objectives and initiate the performance evaluation for the period.



# Employee Acknowledges Global Objectives (cont.)

The employee will scroll down to view all global objectives for the review period and select "Complete" at the end.

**Monica**  
Supervisor: Patricia  
Position Description: [Operations](#)  
Department: UNT Health Science Center

[Overview](#)  
**[Plan](#)**  
[Supervisor Evaluation](#)  
[Self Evaluation](#)  
  
[My Reviews](#)

Home Performance Progress Notes

Hello, Monica [Log Out](#)

Plan for Monica

Actions

Instructions: This is a review of global objectives to initiate the employee end of year report. Please scroll down to review these objectives and select "Complete" to launch the self evaluation.

Global Objectives are the core objectives applied to all staff employees.

Global Objectives

Global Objective

Delivered Quarterly Key Results (Summary Measure of Performance Checks-ins)

Example behaviors at Meets Expectations

- Delivers key results for all expected objectives and tasks.
- Stays focused on tasks and assignments to achieve key results.
- Uses time efficiently to achieve key results.
- Is receptive to constructive critical feedback and implements feedback to improve performance.

Global Objective

Solved Department Problems

Example behaviors at Meets Expectations

- Considers multiple ways to improve services by examining pros and cons.
- Makes informed decisions based on available information.
- Anticipates potential conflict that may arise from change.
- Does not avoid ambiguous situations.
- Open to new ideas from others.
- Willing to modify an existing approach to achieve results.

UNT HSC Non-Supervisor Performance Evaluation Program (Year 1) (Revised)

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 05/01/20 to -

Last Updated: June 05, 2020 14:40

This can be also be done by clicking the “Actions” drop down menu.

You may also print pages by selecting the Print option from the Actions drop down menu

Save Draft

Complete

Actions

Print

Save Draft

Complete

HSC

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# Complete Self-Evaluation

Once the global objectives have been acknowledged, the Self-evaluation step will then open up for the employee to complete.

Monica

Supervisor: Patricia

Position Description: Operations

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

My Reviews

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	<a href="#">Acknowledge Global Objectives</a>	Monica		2020-06-16	
2	<a href="#">Complete Self Evaluation</a>	Monica			2020-07-20
3	Complete Supervisor Evaluation	Patricia Supervisor			2020-07-27
4	Second Level Supervisor Approves Evaluation	Stephen Reviewing Officer			
5	End of Year Review Meeting	Patricia Supervisor			2020-07-31
6	Employee Acknowledges Evaluation	Monica			2020-08-05



The employee will select the second task link to begin the Self Evaluation.



# Complete Self Evaluation (cont.)

The Employee will scroll down the page, select a rating for each objective and provide appropriate feedback regarding performance in these areas. Employees may also add supporting documentation including the OKR worksheet by selecting the “Attachments” link.

Monica

Supervisor: Patricia

Position Description: Operations

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

My Reviews

Self Evaluation for Monica

Actions

Instructions:

- Scroll down the page to select a rating for each global objective and provide appropriate feedback regarding performance in these areas.

- Select Save Draft if you wish to review or edit information before finalizing.

- If you would like to add supporting documentation, please select the Attachments link.

- Select Complete when all actions have been completed and you are ready to submit your self evaluation to your supervisor.

Global Objectives

Attachments

Check spelling

Required fields are indicated with an asterisk (\*).

Global Objectives

Global Objective:

Delivered Quarterly Key Results (Summary Measure of Performance Checks-Ins)

Example behaviors at Meets Expectations:

• Delivers key results for all expected objectives and tasks.

• Stays focused on tasks and assignments to achieve key results.

• Uses time efficiently to achieve key results.

• Is receptive to constructive critical feedback and implements feedback to improve performance.

\* Rating - Select one from drop-down menu

Please select

\* Evaluative Feedback - Summarize significant contributions toward this objective in the past year and provide feedback on opportunities for growth (500 character maximum)

UNTHSC Non-Manager Year 1 (Multi-rater test)  
Review Status: Open  
Evaluation Type: Annual  
Program Timeframe: 01/01/20 to -  
Last Updated: May 13, 2020 14:17  
Last Completed Step: Supervisor Sets Objectives & Key Results

Select “Save Draft” to review or edit information before finalizing or select “Complete” when all entries have been completed. This can be done by clicking the buttons at the bottom of the page or the “Actions” drop down menu.

You may also print pages by selecting the Print option from the Actions drop down menu.

Save Draft Complete

Actions  
Print  
Save Draft  
Complete

HSC

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## Complete Supervisor Evaluation



Monica

Supervisor: Patricia Alphin

Position Description: [Operations](#)

Department: UNT Health Science Center

Overview

Plan

[Supervisor Evaluation](#)

[Self Evaluation](#)

[Multi-rater Feedback](#) ▾

History

[My Reviews](#)

[My Employees' Reviews](#)

Home 5 Performance ▾ Progress Notes

Hello, Patricia Log Out

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Acknowledge Global Objectives	Monica		2020-06-17	
2	Complete Self Evaluation	Monica		2020-06-17	2020-07-20
3	<a href="#">Complete Supervisor Evaluation</a>	Patricia, Supervisor			2020-07-27
4	Second Level Supervisor Approves Evaluation	Stephen Reviewing Officer			
5	End of Year Review Meeting	Patricia Supervisor			2020-07-31
6	Employee Acknowledges Evaluation	Monica			2020-08-05

UNT HSC Non-Supervisor Performance Evaluation Program (Year 1) (Training)

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 06/01/20 to -

Last Updated: June 17, 2020 06:36

Last Completed Step: Complete Self Evaluation

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

The Supervisor will select the next task link to begin the Supervisor Evaluation. When completing the evaluation, supervisors are encouraged to review the self evaluation, progress notes and any collected multi-rater feedback to aid in the evaluation process.





# Supervisor Evaluation (cont.)

The Supervisor will scroll down the page, select a rating for each objective and provide appropriate feedback regarding the employee’s performance in these areas. Employees may also add supporting documentation by selecting the “Attachments” link.

Monica

Supervisor: Patricia

Position Description: Operations

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

Multi-rater Feedback

History

My Reviews

My Employees' Reviews

Supervisor Evaluation for Monica (Score in progress: Unrated)

Instructions:

- Scroll down the page to select a rating for each global objective and provide appropriate feedback regarding the employee's performance in these areas.
- Select "Save Draft" to update the score in progress or to review and edit information before finalizing.
- Make the necessary selection from the drop down menu indicating whether key results were met.
- Enter appropriate comments in the evaluative feedback box provided.
- If you would like to add supporting documentation, please select the Attachments link.
- Select Complete when all actions have been completed and you are ready to submit your evaluation of the employee.

Global Objectives

Required fields are indicated with an asterisk (\*).

Global Objectives

Global Objective:

Delivered Quarterly Key Results (Summary Measure of Performance Checks-ins)

Example behaviors at Meets Expectations:

- Delivers key results for all expected objectives and tasks.
- Stays focused on tasks and assignments to achieve key results.
- Uses time efficiently to achieve key results.
- Is receptive to constructive critical feedback and implements feedback to improve performance.

\* Rating - Select one from drop-down menu

Please select

\* Evaluative Feedback - Summarize significant contributions toward this objective in the past year and provide feedback on opportunities for growth (500 character maximum)

Attachments

Check spelling

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

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 01/01/20 to -

Last Updated: May 13, 2020 15:08

Last Completed Step: Self Evaluation

Co-reviewer: Add Co-reviewer

Save Draft

Complete

Select “Save Draft” to review or edit information before finalizing or select “Complete” when all entries have been completed. 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.

Actions

Print

Save Draft

Complete



# Score in Progress



## Mark

Supervisor: William  
Position Description: [Research](#)

Department: UNT Health Science Center

- Overview
- Plan
- Supervisor Evaluation
- Self Evaluation
- Multi-rater Feedback
- History
- My Reviews
- My Employees' Reviews

[Home](#) [Performance](#) [Progress Notes](#) Hello, William [Log Out](#)

The Supervisor Evaluation has been saved!

Supervisor Evaluation for Mark (Score in progress: Meets Expectations) [Actions](#)

Instructions:

- Scroll down the page to select a rating for each global objective and provide appropriate feedback regarding the employee's performance in these areas.
- Select "Save Draft" to update the score in progress or to review and edit information before finalizing.
- Make the necessary selection from the drop down menu indicating whether key results were met.
- Enter appropriate comments in the evaluative feedback box provided.
- If you would like to add supporting documentation, please select the Attachments link.
- Select Complete when all actions have been completed and you are ready to submit your evaluation of the employee.

Global Objectives

Attachments 0

Required fields are indicated with an asterisk (\*).

[Check spelling](#)

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](#)

If a supervisor wishes to see the employee’s “score in progress” before completing the evaluation, they may click the “Save Draft” button found at the bottom of the page. If changes are required, they can be made at this time, once finished, click “Complete” to submit the evaluation.

[Save Draft](#) [Complete](#)



## 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

Overview


Plan


Supervisor Evaluation

Multi-rater Feedback 

+ Invite Multi-rater

History

 My Reviews

 My Employees' Reviews

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.

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

Cancel

Save

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.)



Home 1 Performance ▾ Progress Notes 1

Hello, Kareem

Welcome to the Employee Portal, Kareem

My Reviews

My Multi Rater Feedback

Your Action Items

Item	Description	Due Date	Status
<a href="#">UNTHSC Supervisor Year 1 (Multi-rater test) for Rebel</a>	Multi-Rater Feedback	n/a	Available

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.)

Home 1 Performance Progress Notes 1

Hello, Kareem Log Out

Supervisor:

Position Description:

Department: UNT Health Science Center

Peer Review

My Reviews

My Multi Rater Feedback

Multi Rater Feedback for

Actions

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 0

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

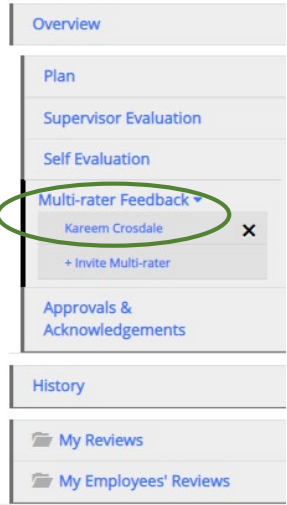
Complete

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

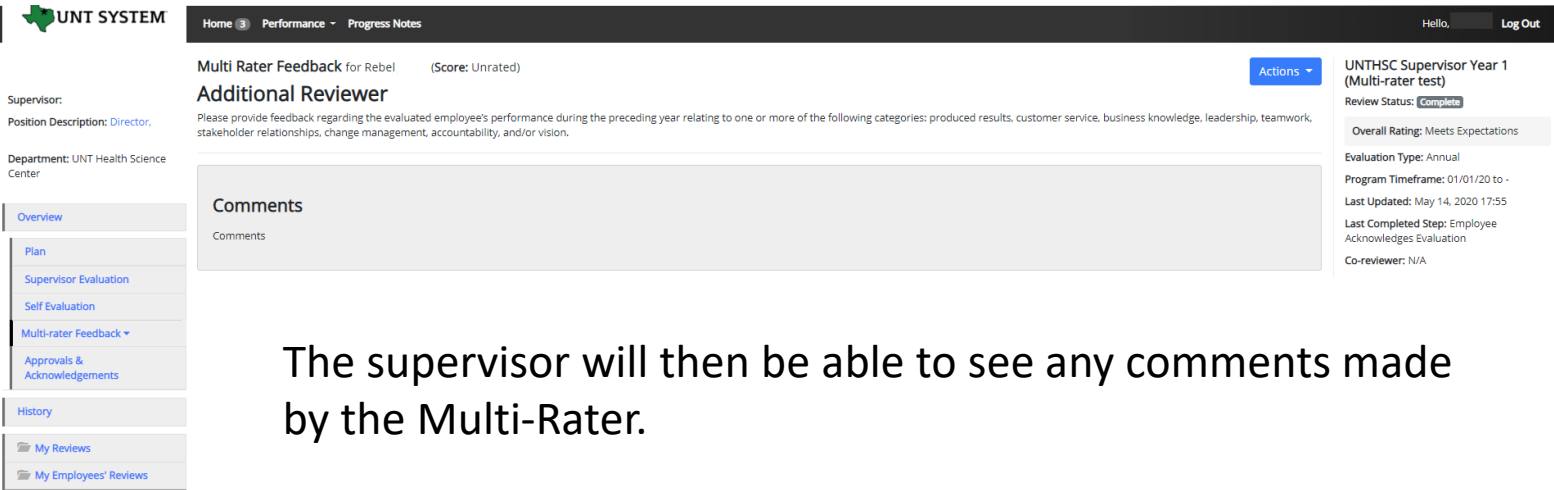
The Multi-rater will enter all comments/feedback within the available “Comments” box, there is no need to add a new entry. They will then have the option of saving as a draft for further review using the “Save Draft” link, or they may select “Complete” to conclude the multi-rater feedback.



# 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 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

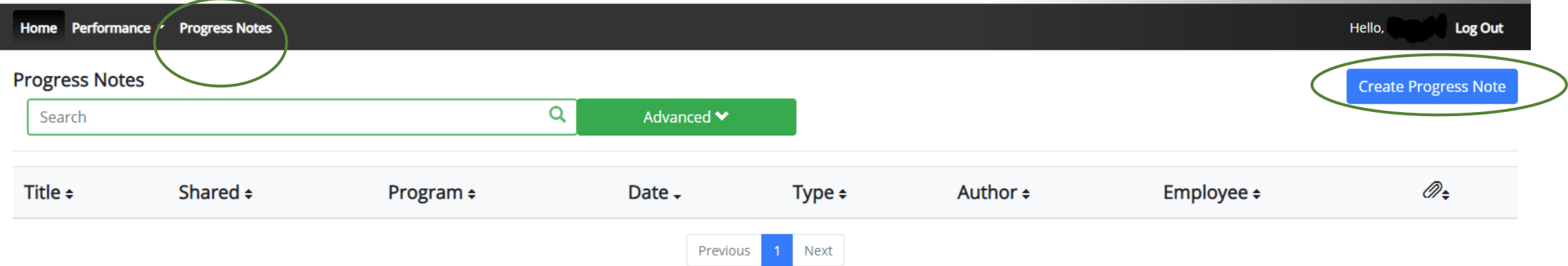
Last Completed Step: Self Evaluation

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





# Progress Notes



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 ↕
<a href="#">Recognition of observed behaviors</a>	<i>private</i>	UNTHSC New Team Member Process	05/07/2020	Original Progress Note	you	you

[Previous](#) [1](#) [Next](#)

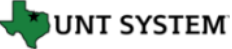
Clicking on the “Progress Notes” link also allows you to view any progress note created by or shared with the individual.

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

[Previous](#) [1](#) [Next](#)



# Second Level Supervisor Approves Evaluation



Home 6 Performance Progress Notes

Hello, Stephen Log Out

Welcome to the Employee Portal, Stephen

My Reviews

My Employees' Reviews

### Your Action Items

Start typing to search

Item	Description	Due Date	Status
<a href="#">UNTHSC Non-Manager Year 1 (Multi-rater test) for Erin</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 (Multi-rater test) for Mark</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Non-Manager Year 1 (Multi-rater test) for Monica</a>	Second Level Supervisor Approves Evaluation	n/a	Available
<a href="#">UNTHSC Supervisor Year 1 (Multi-rater test) for Jason</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Supervisor Year 1 (Multi-rater test) for Kristi</a>	Supervisor Sets Objectives & Key Results	n/a	Available
<a href="#">UNTHSC Supervisor Year 1 (Multi-rater test) for Patricia</a>	Supervisor Sets Objectives & Key Results	n/a	Available

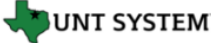
Showing 1 to 6 of 6 entries

The Second Level Supervisor (typically the supervisor’s supervisor) will log in to the employee portal and select the appropriate action from the list on the Home screen. The Second Level Supervisor will receive an email notification indicating that the action is awaiting their attention within the system.



# Second Level Supervisor Approves Evaluation (cont.)

Before selecting the task, the second level supervisor is able to see the employee’s overall rating in the right panel of the page.



Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

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Hello, Stephen Log Out

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Sets Objectives & Key Results	Kareem Crosdale Supervisor		2020-05-13	
2	Self Evaluation	Kareem Crosdale		2020-05-13	
3	Supervisor Evaluation	Kareem Crosdale Supervisor		2020-05-13	
4	<a href="#">Second Level Supervisor Approves Evaluation</a>	Stephen Reviewing Officer			
5	End of Year Review Meeting	Patricia Supervisor			
6	Employee Acknowledges Evaluation	Monica			

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

Review Status: Open

Overall Rating: Exceeds Expectations

Evaluation Type: Annual

Program Timeframe: 01/01/20 to -


Last Updated: May 13, 2020 15:20



Last Completed Step: Supervisor Evaluation


The Second Level Supervisor will then select the next task link to begin their review of the Supervisor Evaluation.



## Second Level Supervisor Approves Evaluation (cont.)

 UNT SYSTEM

Home  Performance  Progress Notes

Hello, Stephen  Log Out

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

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
Self Evaluation

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Supervisor Evaluation for Monica 

Second Level Supervisor Approval Instructions:

- Review supervisor ratings and feedback.
- For approval, select "Acknowledge" to indicate that you agree with the content of the evaluation.
- If revision is needed, enter a comment and select "Return to Supervisor".

Global Objectives

Global Objective:

Delivered Key Results (Summary Measure of Performance Checks-Ins)

Example behaviors at Meets Expectations:

- Delivers key results for all expected objectives and tasks.
- Stays focused on tasks and assignments to achieve key results.
- Uses time efficiently to achieve key results.
- Is receptive to constructive critical feedback and implements feedback to improve performance.


Rating - Select one from drop-down menu


Exceeds Expectations

Evaluative Feedback - Summarize performance toward this objective in the past 12 months and provide feedback on opportunities for growth (500 character maximum)

Evaluative Feedback

Comment

 Return to Supervisor

 Acknowledge

UNT HSC Non-Supervisor Performance Evaluation Program (Year 1) (Training)

Review Status: Open

Overall Rating: Meets Expectations

Evaluation Type: Annual

Program Timeframe: 06/01/20 to -

Last Updated: June 17, 2020 06:49

Last Completed Step: Second Level Supervisor Approves Evaluation


The Second Level Supervisor will scroll to the bottom of the page and review all the selections made and the feedback given by the supervisor. If they are in agreement with the evaluation they may enter an optional comment and click the “Acknowledge” button. If they are not in agreement they can click the “Return to Supervisor” button with appropriate comments.

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# End of Year Review Meeting



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Hello, Patricia Log Out

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

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[Self Evaluation](#)

[Multi-rater Feedback](#)

[Approvals & Acknowledgements](#)

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Task	Task Owner	Date Opened	Date Completed	Due Date
1 Acknowledge Global Objectives	Monica		2020-06-17	
2 Complete Self Evaluation	Monica		2020-06-17	2020-07-20
3 <a href="#">Complete Supervisor Evaluation</a>	Patricia Supervisor		2020-06-17	2020-07-27
4 Second Level Supervisor Approves Evaluation	Stephen Reviewing Officer		2020-06-17	
5 <a href="#">End of Year Review Meeting</a>	Patricia Supervisor			2020-07-31
6 Employee Acknowledges Evaluation	Monica			2020-08-05

UNT HSC Non-Supervisor Performance Evaluation Program (Year 1) (Training)

Review Status: Open

Overall Rating: Meets Expectations

Evaluation Type: Annual

Program Timeframe: 06/01/20 to -

Last Updated: June 17, 2020 06:49

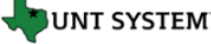
Last Completed Step: Second Level Supervisor Approves Evaluation

Co-reviewer: N/A

The Supervisor will then be notified via email of the next task that requires their attention. They will log in and select the next actionable link to complete the End of Year Review Meeting task.



## End of Year Review Meeting (cont.)

**UNT SYSTEM**

Home **2** Performance ▾ Progress Notes

Hello, Patricia Log Out

**Monica**  
Supervisor: Patricia  
Position Description: [Operations](#)  
  
Department: UNT Health Science Center

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### End of Year Review Meeting

Instructions:

- Schedule time to meet with the employee and review the supervisor evaluation.
- If the overall evaluation score is "Does not Meet Expectations", please consult with Campus HR before meeting with the employee.
- Once the review meeting the employee is complete, select "Complete".

[↗ Complete](#)

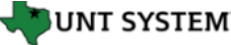
**UNTHSC Non-Manager Year 1 (Multi-rater test)**  
Review Status: **Open**  
  
Overall Rating: Exceeds Expectations  
  
Evaluation Type: Annual  
Program Timeframe: 01/01/20 to -  
Last Updated: May 13, 2020 15:38  
Last Completed Step: Second Level Supervisor Approves Evaluation  
Co-reviewer: N/A

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

**UNT SYSTEM**

Home **3** Performance ▾ Progress Notes

Hello, Monica Log Out

**Monica**  
Supervisor: Patricia  
Position Description: [Operations](#)  
  
Department: UNT Health Science Center

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[My Reviews](#)

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	<a href="#">Acknowledge Global Objectives</a>	Monica		2020-06-17	
2	<a href="#">Complete Self Evaluation</a>	Monica		2020-06-17	2020-07-20
3	<a href="#">Complete Supervisor Evaluation</a>	<b>Patricia</b> Supervisor		2020-06-17	2020-07-27
4	<a href="#">Second Level Supervisor Approves Evaluation</a>	<b>Stephen</b> Reviewing Officer		2020-06-17	
5	<a href="#">End of Year Review Meeting</a>	<b>Patricia</b> Supervisor		2020-06-17	2020-07-31
6	<a href="#">Employee Acknowledges Evaluation</a>	Monica			2020-08-05

**UNT HSC Non-Supervisor Performance Evaluation Program (Year 1) (Training)**  
Review Status: **Open**  
  
Overall Rating: Meets Expectations  
Evaluation Type: Annual  
Program Timeframe: 06/01/20 to -  
Last Updated: June 17, 2020 07:26  
Last Completed Step: End of Year Review Meeting



Once the End of Year Review Meeting has concluded, the employee will receive an email notification directing them to complete the next task. The employee will log in to the portal and select the final task to conclude the process.



# Employee Acknowledges Evaluation (cont.)

UNT SYSTEM

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

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Hello, Monica Log Out

Supervisor Evaluation for Monica

Actions

Instructions:

- Scroll down the page to review the evaluation results and comments.

- At the bottom of the page, add comments if desired.

- Select "Acknowledge" to complete the evaluation. Selecting Acknowledge indicates receipt of the evaluation.

Global Objectives

Global Objective:

Delivered Quarterly Key Results (Summary Measure of Performance Checks-Ins)

Example behaviors at Meets Expectations:

• Delivers key results for all expected objectives and tasks.

• Stays focused on tasks and assignments to achieve key results.

• Uses time efficiently to achieve key results.

• Is receptive to constructive critical feedback and implements feedback to improve performance.

Rating - Select one from drop-down menu

Exceeds Expectations

Evaluative Feedback - Summarize significant contributions toward this objective in the past year and provide feedback on opportunities for growth (500 character maximum)

You did it good!

Comment

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

Review Status: Open

Overall Rating: Exceeds Expectations

Evaluation Type: Annual

Program Timeframe: 01/01/20 to -

Last Updated: May 13, 2020 15:48

Last Completed Step: End of Year Review Meeting

Check spelling

Acknowledge

The employee will scroll to the bottom of the page, add any optional comments if desired and click on the “Acknowledge” button to indicate receipt of the evaluation.

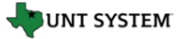
HSC

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## Completed Evaluation

Once the employee submits their acknowledgement, all tasks and action items are complete for this evaluation. All steps in the task list will have a green indicator and there will be no more action items pertaining to this evaluation.

**UNT SYSTEM**

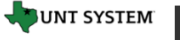
**Monica**  
Supervisor: Patricia  
Position Description: [Operations](#)  
  
Department: UNT Health Science Center

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Home <sup>2</sup> Performance Progress Notes

Task	
1	<a href="#">Acknowledge Global Objectives</a>
2	<a href="#">Complete Self Evaluation</a>
3	<a href="#">Complete Supervisor Evaluation</a>
4	<a href="#">Second Level Supervisor Approves Evaluation</a>
5	<a href="#">End of Year Review Meeting</a>
6	<a href="#">Employee Acknowledges Evaluation</a>

**UNT SYSTEM**

Go to UNT System HR Site **PeopleAdmin**  
Hello, Monica Log Out

Welcome to the Employee Portal, Monica

[My Reviews](#)

**Your Action Items**

Item	Description	Due Date	Status
You don't have any Action Items.			



## Appendix



## Features of Performance Module

- Supervisors can access 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 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.



## Rating Structure

- 3 – Exceeds Expectations – Performance exceeds established objectives on a regular basis; exhibits a degree of excellence in accomplishing individual and department goals beyond the normal job requirements.
- 2 – Meets Expectations – Performance meets established objectives and fully completes normal job requirements.
- 1 – Does Not Meet Expectations – Performance of established objectives is inconsistent; meets some of the minimum requirements of the position, but needs to improve performance in other areas.

***Please note that any score other than a 2 on an individual goal or job duty requires comments/justification.***

***If an employee receives an overall score of 1 – 1.4 (Does not Meet Expectations), 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 »](#)

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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](mailto: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](mailto:HSC.HR@untsystem.edu)
  - Phone: 817-735-2690