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
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.
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.

The Performance button repeats the My Reviews and My Employees’ Reviews links found on the left side of the screen.
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.
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.
Beginning the Review Process

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. **2nd 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
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

Select the first task link to review and acknowledge the global objectives and initiate the performance evaluation for the period.
The employee will scroll down to view all global objectives for the review period and select "Complete" at the end.

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

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.

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.
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.

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.
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.
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.
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 (cont.)

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

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.)

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.
End of Year Review Meeting

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.
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

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.)

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.
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.
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 »

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