General Questions

1. **Can I enter information into the performance management system and later make revisions or add comments?** Yes, you can save a draft and go back and add comments. There is no auto-save feature but you can select “Save Draft” on any page where data entry or feedback/comments are requested. If you complete a task and need to make revisions, you will need to request to reopen the task (see question #2).

2. **What if I need to redo or edit an item that has already been submitted?** Contact HR Compensation with your request at HRComp@untsystem.edu. The task will be reopened for you.

3. **My employee is not displaying on my list of action items, what do I do?** Please verify that the employee’s “reports to” information is correct in EIS. If an update is necessary, please submit an ePAR. Some employees may not appear depending on the program dates and eligibility criteria established for your institution. If you are still having difficulty accessing your employee’s information, please contact the Compensation and Performance Management Team at HRComp@untsystem.edu.

4. **Will administrative professionals have access to the system for other departmental employees?** No, the electronic performance management system is intended for interaction between manager and employee. Administrative professionals will only be able to access their own reviews and reviews for their direct reports.

5. **What if an employee or manager is on leave or a supervisor position is vacant during the performance evaluation window?** Please discuss individual leave scenarios with your System or Campus HR representative. For vacant supervisor positions, the review will generally escalate to the next level supervisor.
6. **Does a Co-Reviewer have the same permissions as the Supervisor?** Yes, a co-reviewer can create or modify the performance plan and evaluation and can also conduct the mid-year check in and performance review meetings.

7. **Can we use both multi-rater(s) and a co-reviewer?** Yes. Requesting multi-rater feedback is recommended in order to gain stakeholder input. Multiple multi-raters can be invited to provide feedback. The co-reviewer is utilized when you want another individual to aid in establishing the evaluation plan and in conducting the performance review. Only one co-reviewer may be selected.

8. **Is this system also utilized for Faculty and Student evaluations?** No. This tool is for the performance evaluation process for staff employees only. Faculty who supervise employees will need to utilize the system to conduct their staff employee’s performance evaluation.

9. **Is there a requirement to receive 2nd level supervisor approval on evaluations?** This varies by institution. For HSC, a 2nd level approval step is configured into the review process. For other campuses and for UNT System, 2nd level approval is not required to complete the evaluation process. A department or division could request that 2nd level approval be sought outside of the performance system, but it would not be included as a mandatory step in the review process. Alternatively, the 2nd level manager could be invited to provide feedback as a multi-rater during the annual review process.

10. **Can employees create progress notes or is this function only available for supervisors?** Both employees and supervisors have the ability to create progress notes. Progress notes can be shared between the supervisor and employee. Notes can be added throughout the year.

11. **What happens if there is a supervisor change after the performance cycle opens, such as if a supervisor leaves or the employee transfers to another department?** After ePARs are fully processed reflecting the change in supervisor, the employee’s review information should also update in PeopleAdmin to reflect the change. If the information does not update, please contact the Compensation and Performance Management Team at HRcomp@untsystem.edu

12. **Will the employee be able to see comments from other raters?** Multi-rater feedback will only be accessible and viewable by the supervisor.

13. **What is a Classification Description vs. a Position Description in PeopleAdmin?** In the Position Management section of PeopleAdmin (navigate to jobs.untsystem.edu/hr. In the upper left corner click on the three dots and select Position Management). The following components are available:
   a. **Classification Description** - The classification description is the generic description developed for each job title and contain basic information about the job title including
sample tasks and minimum qualifications. Classification descriptions are the same for all individuals employed in that job title. Edits can be made by Human Resources only.

b. **Position Description** - The position description reflects position specific information including the Position Overview, Supervisory Responsibilities, Preferred Qualifications, Physical Requirements and Job Duties. Information contained here will be used in future job postings; therefore, be mindful of that when crafting the position description. Content can be edited by the Department and reflects information specific to each individual position.

c. **Job duties** - Job duties are the regular tasks and responsibilities performed by the position. It is recommended that departments report 7-10 primary responsibilities of the position when listed job duties. Percentages of time spent on each duty can be entered but they do not actually provide weights to the performance review process. For example, I could input that one task is performed 50% of the time and five other tasks are performed 10% of the time each. The performance system will still weigh them all exactly the same.

d. **Competencies** - A competency is a measurable skill, ability or behavior that is necessary to successfully perform a position. Not all departments utilize competencies or competency-based evaluations. If a department wants to explore the use of competencies, contact Human Resources who will partner with the department to develop appropriate department-wide competencies.

**UNT Specific Questions**

1. **Because 2nd level manager approval is not configured into the UNT's performance program, is there a way to obtain 2nd level review before the assessment is finalized and shared with the staff member?** There is not a way to share a draft document within the online tool other than using the Co-Reviewer feature. It is recommended that 2nd level manager approval be obtained outside of the system by sharing a PDF via email.

2. **For UNT, the UPO-31 information was mass uploaded into the Performance Management System in early 2020. Where can that be found?** Navigate to jobs.untsystem.edu/hr. In the upper left corner click on the three dots and select **Position Management**. Click **Position Descriptions** located in the orange/brown banner and select **Staff**. If you are a supervisor (and logged in with the Supervisor role) you will see a list of all positions that report to you. If you are an employee (and logged in with the Employee role) you will see your own position. To see the role that you are logged in as, look in the upper right corner under **User Group**.

Click each position link to access the position description. The UPO information (if submitted) is included near the bottom of the position description in the Job Duties section. **This is NOT needed for the UNT 2020 midyear other than to use for reference to the UPO data when providing employee feedback. This data will be used in the UNT Spring 2021 evaluation cycle.**
3. **What is the 2020 mid-year assessment timeline for UNT?**
   b. **Evaluation period:** Provide performance feedback and reset goals since the 2019 annual evaluation, particularly since March 1st and the impact of the pandemic. Exact dates will vary based on when this evaluation is completed, but the absolute latest dates are June 1, 2019 - September 30, 2020. (e.g. If the last evaluation was completed April 29, 2019 and this one is completed October 15, 2020 then the dates that are covered are April 29, 2019 to September 30, 2020.)
   c. **Who gets evaluated?** Staff employees who started on or before 7/31/2020
   d. **Review Type:** This is an abbreviated mid-year review. This was done to ensure staff received performance feedback despite the chaos created by the coronavirus pandemic. It provides an important opportunity to give feedback to staff members.
   e. **The UNT 2021 annual review** will be completed during the normal cycle from April 1, 2021 to May 31, 2021. Training for the next cycle will be held later in the year.

4. **For UNT, is it possible to do the evaluation with the UPO-31 and then upload it as an attachment?**
   a. No, the mid-year evaluation process in PeopleAdmin should be used to provide performance feedback and reset goals since the 2019 annual evaluation. The UPO and the expectations set in that document should be used as a basis for identifying and recognizing someone’s accomplishments, but it should not be completed and attached.

5. **For the UNT 2020 mid-year assessment, please define what “Progress Needed” and “On Track” mean and how those should be utilized? How does this impact score and merit?**
   a. **On Track** means the employee is meeting expectations.
   b. **Progress Needed** means the employee is not meeting expectations. If this selection is recommended, please contact Human Resources to discuss prior to completing the mid-year assessment.
   c. Annual review scores are what typically determines merit eligibility. The annual review will be conducted in April-May 2021.

6. **For UNT, how and where is the score computed and where can it be found?**
   a. The UNT Fall 2020 mid-year review is a word score of “On Track” or “Progress Needed”. There is no numeric score for the mid-year assessment. The score can be found on the left side of the performance document once the supervisor selects the value and selects “Save Draft” or “Complete”.
   b. For the upcoming UNT 2021 annual review process, training will be provided regarding how scores on job duties and goals will be calculated. The key take-away from training is that in the UNT annual review process, goals will comprise 60% of the overall score and job duties will comprise 40%.
1. **How were HSC Global Objectives established?** The global objectives utilized for HSC performance evaluations were developed internally by the People and Culture committee. These objectives were approved by Cabinet and apply to all staff employees at HSC.