



PeopleAdmin Performance Management User Guide

HSC Supervisor and Non-Supervisor Program
2021



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



Performance Program Overview

PERFORMANCE EVALUATION PERIOD DEADLINES

| | |
|----------------------------------|--|
| 2021 Evaluation Period | 8/1/2020—7/31/2021 |
| Enter and Approve OKR plans | By 10/2/2020 |
| Performance Check-ins | 12/1/2020—12/23/2020 4/1/2021—4/30/2021 6/21/2021—7/9/2021 |
| Employee Self Evaluation | By 7/23/2021 |
| Supervisor Evaluation | By 7/30/2021 |
| 2nd Level Supervisor Approval | By 8/6/2021 |
| End of Year Meeting | By 8/13/2021 |
| Employee Acknowledges Evaluation | By 8/18/2021 |

Step 1: Enter and Approve OKRs

- Supervisors and employees establish OKRs and enter into system.

Step 2: Performance Check Ins

- Supervisors and employees meet in December, April and July to review progress towards objectives.

NOTE: The system allows managers to invite feedback from other UNT World employees.

Co-Reviewer- Use this function if another reviewer should have full feedback capabilities to the employee's evaluation.

Multi-Rater- Use this function to invite feedback from other UNT World employees (customers, peers, etc.) on the employee's performance.

HSC Annual Performance Evaluations FY 2021

Step 3: Self Evaluation

- Employee enters comments and selects overall self rating

Step 4: Supervisor Evaluation

- Supervisor completes evaluation and selects performance rating
- Second level supervisor indicates agreement with the content of the evaluation.

Step 5: 2nd Level Supervisor Approval

- Supervisor and employee meet to review the supervisor evaluation.

Step 6: End of Year Review meeting

- Employee acknowledges receipt of review materials and score

NOTE: If an employee receives an overall score of Unsatisfactory please meet with HSC HR before conducting the employee meeting.

For questions or assistance contact the HSC HR team:

- HSC.HR@untsystem.edu
- (817)-735-2690

To reference additional resources visit:

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

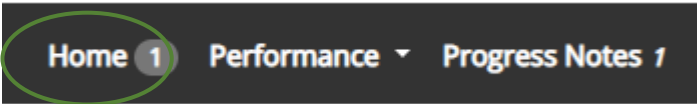


Step 1

Establish Objectives & Key Results



Beginning the Review Process



Your Action Items

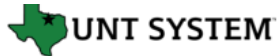
| Item | Description | Due Date | Status |
|--|------------------------------------|--------------------------------|--------|
| UNT HSC FY 2021 Non-Supervisor Performance Evaluation Program for Monica | Establish Objectives & Key Results | 2020-10-02 Due 5 months ago | |

Showing 1 to 1 of 1 entries

Employees will receive email notifications instructing them of any tasks that need to be completed. By selecting the link in the email, employees will be taken to the “Home” screen which displays actionable items. To begin the evaluation process, employees will complete available action item(s) by selecting the relevant link from the list.



Establish Objectives & Key Results



Home 4 Performance ▾ Progress Notes

Hello, Monica

Welcome to the Employee Portal, Monica

My Reviews

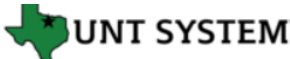
Your Action Items

| Item | Description | Due Date | Status |
|---|--------------------------------------|-----------------------------|----------|
| UNT HSC FY 2021 Non-Supervisor Performance Evaluation Program for Monica | Establish Objectives and Key Results | 2020-09-30 Due in 5 days | Upcoming |
| UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program 35/65 for Monica | Establish Objectives & Key Results | 2020-09-30 Due in 5 days | Upcoming |

The employee will be notified via email that there is a task open for them to take action on within the system. The employee will then log in and select the relevant task link to from the action list found on the home screen.



Establish Objectives & Key Results (cont.)



Monica

Supervisor: Patricia

Position Description: [Operations](#)


Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

 [My Reviews](#)

Home 4 Performance **Progress Notes**

Hello, Monica Log Out

Plan for Monica

Actions

Instructions:

Tab 1 - Objectives & Key Results Achievement:

- Meet with your supervisor to complete the Objectives & Key Results (OKR) worksheet prior to entering information below.
- For information and resources for the OKR process, please select the following link [Developing OKR Plans](#)
- Attach your completed OKR worksheet as a Progress Note by selecting the "Progress Notes" link above, complete the required fields, and attach the document.
- Scroll down the page and enter your approved Objectives, Key Results and Targets in the fields below.
- If an objective is a team objective, please select the check box under "Is this a team objective and key result?" and enter the team member names in the field below.
- Select "Add Entry" to add additional objectives, key results and targets.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- Once you have entered all objectives, key results and targets, select "Save and Continue".

Tab 2 - Objectives & Key Results Assessment:

- Review the factors to be assessed and select "Save and Continue".
- Select "Save Draft" if you wish to review or edit information before finalizing.

Tab 3 - Global Objectives Assessment:

- Scroll down the page to view the global objectives and select "Complete".
- Visit the performance management web page for the system user guide and additional resources [System Human Resources Website](#).

Objectives & Key Results Achievement

Objectives & Key Results Assessment

Global Objectives Assessment

UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program (35/65 copy) (Copy)

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 09/01/20 to -

Last Updated: September 22, 2020 12:04

Tab 1: Read through the instructions and attach the OKR worksheet using the "Progress Notes" link. **See Appendix for more information on Progress Notes.**



Establish Objectives & Key Results (cont.)

Objectives & Key Results Achievement [Objectives & Key Results Assessment](#) [Global Objectives Assessment](#)

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

Objectives & Key Results Achievement

* My Objective: What do I want to do to support my Business Unit? - Begin statement with a verb

* Key Result: How will I know if I've met my objective? - Measures achievement and most likely includes a number i.e. date, percentage, total, etc.

* December Targets - What I will do in this period toward reaching my key result

* April Targets - What I will do in this period toward reaching my key result

* July Targets - What I will do this period toward reaching my key result

Is this a team objective and key result?

☐ Team Member List

Please list any team members (if applicable) relating to this OKR

☐ Remove Entry?

[Add Entry](#) [Save Draft](#) [Save & Continue](#)

After attaching the OKR worksheet in Progress Notes (see Appendix), copy the objectives and key results into the system for assessment as well as the specific targets to be achieved.

If additional space is required select the add entry button (maximum of 5), once all OKRs have been entered select "Save Draft" if you wish to review or make edits or "Save & Continue" to move to the next tab.

For each objective, it is acceptable to enter multiple key results and targets into the appropriate field below the objective field. You can designate individual key results or targets within the field by listing them numerically (i.e. 1. Key result one, 2. Key result two) or by placing a - or * in front of each item.




Establish Objectives & Key Results (cont.)

[Objectives & Key Results Achievement](#)

Objectives & Key Results Assessment

[Global Objectives Assessment](#)


Objectives & Key Results Assessment

 [Check spelling](#)

This tab contains the factors utilized to evaluate overall performance on established Objectives and Key Results (OKR). 35% of the overall evaluation score will be based on employee performance of OKRs.

Example behaviors at Meets Expectations

- Regularly achieves majority of goals 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.

 Save Draft

Save & Continue

Tab 2: View the factors to be used in assessing objectives and key results. Select “Save & Continue” to move to the next tab.



Establish Objectives & Key Results (cont.)

Objectives & Key Results Achievement

Objectives & Key Results Assessment

Global Objectives Assessment

Global Objectives Assessment

This tab contains the factors utilized to evaluate performance on established Global Objectives. 65% of the overall evaluation score will be based on employee performance relating to these objectives.

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.

Global Objective

Demonstrated Functional Knowledge and Skills

Example behaviors at Meets Expectations

- Effectively demonstrates skills and knowledge needed in one's role and department.
- Applies current best practices in one's field or specialty area to unit requirements.
- Maintains awareness of innovations and major developments in one's field.
- Completes assignments with minimal supervision.
- Recognized by customers and team members for effective functional knowledge and skills.

[Check spelling](#)

Tab 3: Scroll down to view the factors that will be used to evaluate global objectives. If you wish to review your entered information select “Save Draft” otherwise select “Complete” to finalize this step.

Save Draft

Complete

You can complete the step also by clicking the “Actions” drop down menu (found at the top of the page) and select Complete. You may also print pages by selecting the Print option from the Actions drop down menu

Actions ▾

Print

Save Draft

Complete



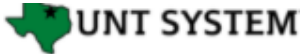
Step 2

Complete Self-Evaluation



Complete Self-Evaluation

When all check-in meetings have concluded, the employee will then be required to complete their Self-evaluation.



Home 4 Performance ▾ Progress Notes

Hello, Monica Log Out

Welcome to the Employee Portal, Monica

My Reviews

Your Action Items

Start typing to search

| Item | Description | Due Date | Status |
|---|--------------------------------------|--------------------------------|----------|
| UNT HSC FY 2021 Non-Supervisor Performance Evaluation Program for Monica | Establish Objectives and Key Results | 2020-09-30 Due in 6 days | Upcoming |
| UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program 35/65 for Monica Gomez | Complete Self-Evaluation | 2021-07-23 Due in 10 months | Upcoming |
| UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program (35/65) for Monica | Establish Objectives & Key Results | 2020-09-30 Due in 6 days | Upcoming |
| UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program for Monica | Establish Objectives & Key Results | 2020-09-30 Due in 6 days | Upcoming |

The employee will select the relevant task link from the list of actions to begin the Self Evaluation.



Complete Self-Evaluation (Cont.)

UNT SYSTEM

Home 4 Performance Progress Notes

Hello, Monica Log Out

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

Approvals & Acknowledgements

My Reviews

Self Evaluation for Monica

Actions

Instructions:

Tab 1 - Objectives and Key Results Achievement:

- Scroll down the page and make the necessary selection from the drop down menu indicating if key results were met.
- Select "Save and Continue" when you are ready to move to the next step.

Tab 2 - Objectives and Key Results Assessment:

- Scroll down the page to select a rating for the overall performance of objectives and key results and provide appropriate feedback regarding your performance in this area.
- If you would like to add supporting documentation, please select the "Attachments" link.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- Select "Save and Continue" when you are ready to move to the next step.

Tab 3 - Global Objectives Assessment:

- Scroll down the page to select a rating for each global objective and provide appropriate feedback regarding your performance in these areas.
- If you would like to add supporting documentation, please select the "Attachments" link.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- Select "Complete" when all actions have been completed and you are ready to submit your self-evaluation to your supervisor.

Objectives & Key Results Achieved Objectives & Key Results Assessment Global Objectives Assessment

Attachments 0

Check spelling

UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program 35/65

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 09/01/20 to -

Last Updated: September 24, 2020 10:40

Last Completed Step: July Performance Check-In

Tab 1: On the first tab, the employee will scroll down the page to indicate if they have met their key results for each objective using the drop down menu, they will then select “Save Draft” if the wish to make edits or select “Save & Continue” to move to the next tab.

* Key Result Met?

[Save Draft](#) [Save & Continue](#)



Complete Self-Evaluation (Cont.)

Objectives & Key Results Achieved

Objectives & Key Results Assessment

Global Objectives Assessment

Attachments 0

Required fields are indicated with an asterisk (*).

ABC [Check spelling](#)

Objectives & Key Results Assessment

On this tab, enter the rating reflective of your overall performance of established Objectives and Key Results (OKR). 35% of the overall evaluation score will be based on employee performance of OKRs.

Example behaviors at Meets Expectations

- Regularly achieves majority of goals 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

Meets Expectations

* Evaluative Feedback - Summarize performance toward this objective in the past year and provide feedback on opportunities for growth (2000 character maximum)

Evaluative Feedback

☐ Remove Entry?

Save Draft

Save & Continue

Tab 2: On the second tab, the employee will view the factors being used to asses their OKRs, select a rating from the drop down menu reflecting their overall performance of their OKRs, and provide feedback. Select “Save Draft” if edits are required before finalizing, or select “Save and Continue” to move to the next tab. OKRs make up 35% of the overall evaluation score.



Complete Self-Evaluation (Cont.)

Objectives & Key Results Achieved | Objectives & Key Results Assessment | Global Objectives Assessment | Attachments 0

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

Global Objectives Assessment

On this tab enter the appropriate rating for your performance of each established Global Objective. 65% of the overall evaluation score will be based on employee performance relating to these objectives.

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.

* Rating - Select one from drop-down menu

Please select

* Evaluative Feedback - Summarize individual performance toward this objective in the past 12 months (2000 character maximum)

Tab 3: On the third tab the Employee will scroll down the page, selecting a rating for each global objective and provide appropriate feedback regarding performance in each area. Employees may also add supporting documentation including an updated OKR worksheet by selecting the “Attachments” link. Global objectives make up 65% of the overall evaluation score.

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 using the “Actions” drop down menu. Employees may also print pages by selecting the Print option from the Actions drop down menu.

Actions ▾

Print

Save Draft

Complete

Save Draft

Complete

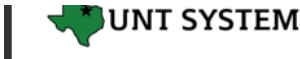


Step 3

Employee Acknowledges Evaluation



Employee Acknowledges Evaluation



Welcome to the Employee Portal, Monica

Your Action Items


Start typing to search

| Item | Description | Due Date | Status |
|---|--------------------------------------|--------------------------------|----------|
| UNT HSC FY 2021 Non-Supervisor Performance Evaluation Program for Monica | Establish Objectives and Key Results | 2020-09-30 Due in 5 days | Upcoming |
| UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program ;35/65 for Monica | Employee Acknowledges Evaluation | 2021-08-18 Due in 11 months | Upcoming |
| UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program (35/65) for Monica | Establish Objectives & Key Results | 2020-09-30 Due in 5 days | Upcoming |
| UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program for Monica | Establish Objectives & Key Results | 2020-09-30 Due in 5 days | Upcoming |

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.)

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

[Overview](#)
[Plan](#)
Supervisor Evaluation
[Self Evaluation](#)
[Approvals & Acknowledgements](#)

[My Reviews](#)

Home 4 Performance ▾ Progress Notes

Hello, Monica Log Out

Supervisor Evaluation for Monica

Actions ▾

Instructions:

- Scroll down the page to review evaluation results and comments. Please note, the overall evaluation score is displayed on the right hand section of the page
- At the bottom of the page, add comments if desired.
- Select "Acknowledge" to complete the evaluation. Selecting "Acknowledge" indicates receipt of the evaluation.

Objectives & Key Results Achieved

My Objective: What do I want to do to support my Business Unit?:
Objective

Key Result: How will I know if I've met my objective?:
[Check spelling](#)

UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program 35/65
Review Status: Open
Overall Rating: Meets Expectations
Evaluation Type: Annual
Program Timeframe: 09/01/20 to
Last Updated: September 24, 2020 13:53
Last Completed Step: End of Year Review Meeting

Comment

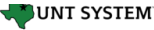
Acknowledge



The overall rating can be viewed on the right side of the page. The employee can review the content of the evaluation, scroll to the bottom of the page and add any optional comments if desired, and click on the “Acknowledge” button to indicate receipt of the evaluation.



Completed Evaluation



Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

[Overview](#)



[Plan](#)

[Supervisor Evaluation](#)

[Self Evaluation](#)

[Approvals & Acknowledgements](#)

[My Reviews](#)

Home  Performance  Progress Notes

Task

1

[Establish Objectives & Key Results](#)

2

[Supervisor Approves Objectives & Key Results](#)

3

[December Performance Check-In](#)

4

[April Performance Check-In](#)

5

[July Performance Check-In](#)

6

[Complete Self-Evaluation](#)

7

[Complete Supervisor Evaluation](#)

8

[Second Level Supervisor Approves Evaluation](#)

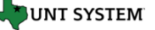
9

[End of Year Review Meeting](#)



10

[Employee Acknowledges 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.



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

Home  Performance  Progress Notes

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. | | | |



Contacts

- HR Compensation and Performance Management Team
 - System issues: log-in, employees not listed, navigation issues, re-open a task
 - Email: kareem.crosdale@untsystem.edu
 - Phone: 940-369-6353
- HSC Campus HR Team
 - Performance management concerns, discussion about unsatisfactory ratings
 - Email: HSC.HR@untsystem.edu
 - Phone: 817-735-2690
- Performance Management Web Page <https://hr.untsystem.edu/peopleadmin>