



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

Step 5: 2nd Level Supervisor Approval

- Second level supervisor indicates agreement with the content of the evaluation.

Step 6: End of Year Review meeting

- Supervisor and employee meet to review the supervisor evaluation.

Step 7: Employee Acknowledges Evaluation

- 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>

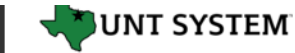


Step 1

Supervisor Approves Objectives & Key Results



Supervisor Approves Objectives & Key Results



Home 4 Performance ▾ Progress Notes

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

My Reviews

My Employees' Reviews

Your Action Items

Start typing to search

Item	Description	Due Date	Status
UNT HSC FY 2021 Supervisor Performance Evaluation Program for Patricia	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	Supervisor Approves Objectives & Key Results	2020-09-30 Due in 5 days	Upcoming

Once the employee has entered the established OKRs and targets into the system, the supervisor will receive notification with a link to the system via email the following morning.

The supervisor will log into the employee portal and select the relevant Action Item link in order to access the OKRs which were entered.

*Action items can be accessed from either the Home screen or the My Employees' Reviews link.



Supervisor Approves Objectives & Key Results (Cont.)

UNT SYSTEM

Monica

Supervisor: Patricia

Position Description: Operations

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

Multi-rater Feedback

Approvals & Acknowledgements

History

My Reviews

My Employees' Reviews

Home Performance Progress Notes

Hello, Patricia Log Out

Plan for Monica

Actions

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 22, 2020 15:16

Last Completed Step: Establish Objectives & Key Results

Co-reviewer: Add Co-reviewer

Instructions:

- Scroll down the page to review the established Objectives, Key Results and Targets for the review period.
- In order to view the attached OKR worksheet, select the "Progress Notes" link above.
- At the bottom of the page, add comments if desired.
- Select "Acknowledge" to indicate that these are the agreed upon Objectives & Key Results for the upcoming review period.
- If revision is needed, select "Return for Revision" and the form will be returned to the employee to make updates.

Objectives & Key Results Achievement

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

Objective

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.

Objective

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

Objective

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

Objective

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

Objective

Is this a team objective and key result? (Check box below if Yes)

No

Team Member List - Please list any team members (if applicable) relating to this OKR

The supervisor will begin by reviewing the entries made within the Objectives & Key Results Achievement section. Once satisfied that the entries made are the agreed upon OKRs, the supervisor will scroll down to view the assessment factors.



Supervisor Approves Objectives & Key Results (Cont.)

Objectives & Key Results Assessment

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.

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.

Comment

The supervisor will be able to review all factors used to assess both the OKRs as well as the global objectives. Note – these are not editable by the supervisor or employee.

The supervisor will then scroll to the bottom of the page in order to complete the task. They will be able to enter comments, return the form to the employee for any revisions, or acknowledge the step in order to move to the next task. If revisions are needed, select “Return for Revision.” If the form is approved, select “Acknowledge” to complete the task.

Return for Revision

Acknowledge



Step 2

Performance Check-ins



Performance Check-Ins

Supervisors are required to have periodic meetings with all employees to assess and give feedback on progress related to the position as well as towards achieving objectives, key results and tasks.
From the Home screen, the supervisors will select the relevant evaluation link for the specific employee.

Home 4 Performance Progress Notes

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

My Reviews

My Employees' Reviews

Your Action Items

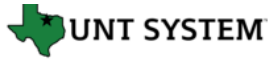
Start typing to search

Item	Description	Due Date	Status
UNT HSC FY 2021 Supervisor Performance Evaluation Program for Patricia	Establish Objectives and Key Results	2020-09-30 Due in 7 days	Upcoming
UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program (35/65) - Monica	December Performance Check-In	2020-12-23 Due in 3 months	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program (35/65) for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 7 days	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 7 days	Upcoming

Showing 1 to 4 of 4 entries



Performance Check-Ins (Cont.)



Home 4 Performance ▾ Progress Notes

Hello, Patricia Log Out

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

Multi-rater Feedback ▾

Approvals &
Acknowledgements

History

My Reviews

My Employees' Reviews

December Performance Check-In

Instructions:

- Schedule time to meet with the employee to discuss progress and provide feedback on any adjustments required for the employee to meet or exceed expectations regarding the established Objectives & Key Results.
- Utilize the "Progress Notes" function to document if targets were met for the review period. If changes are required to the established Objectives & Key Results, please contact the HR Compensation and Performance Management team for assistance.
- Once the meeting with the employee is complete, select "Complete".

→ Complete

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 23, 2020 08:19

Last Completed Step: Supervisor Approves Objectives & Key Results

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

Progress notes should be entered to document if the employee met the targets assigned to this time period. Once the supervisor has met with the employee and given them an update on their progress they will select the "Complete" button to indicate that the meeting has taken place. This process will be repeated for all subsequent performance check-ins.

If OKRs need updating, the supervisor should reach out to their Compensation and Performance Management representative (kareem.crosdale@untsystem.edu) for assistance.

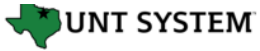


Step 3

Complete Supervisor Evaluation



Complete Supervisor Evaluation



Home 4 Performance ▾ Progress Notes

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

Your Action Items

Item	Description	Due Date	Status
UNT HSC FY 2021 Supervisor Performance Evaluation Program for Patricia	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	Complete Supervisor Evaluation	2021-07-30 Due in 10 months	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program (35/65) for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 5 days	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 5 days	Upcoming

Showing 1 to 4 of 4 entries

Once the self evaluation is complete, the supervisor will be notified. The Supervisor will select the Complete Supervisor Evaluation task from the home page 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.



Complete Supervisor Evaluation (cont.)

UNT SYSTEM

Home Performance Progress Notes

Hello, Patricia Log Out

Monica

Supervisor: Patricia

Position Description: Operations

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

Multi-rater Feedback

Approvals & Acknowledgements

History

Supervisor Evaluation for Monica (Score in progress: Unrated)

Actions

Instructions:

Tab 1 - Objectives & 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 & Key Results Assessment:
- Scroll down the page to select an overall rating for the performance of objectives and key results and provide appropriate feedback regarding the employee's 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 the employee's 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 the score in progress (scroll to the top of the page) or edit information before finalizing.
- Select "Complete" when all actions have been completed and you are ready to submit your evaluation of the employee to the second level approver.

Objectives & Key Results Achieved

Objectives & Key Results Assessment

Global Objectives Assessment

Attachments

Check spelling

UNT HSC 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 24, 2020 12:21

Last Completed Step: Complete Self-Evaluation

Co-reviewer: Add Co-reviewer

Objectives & Key Results Achieved

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

My Objective

Key Result: How will I know if I've met my objective?:

Key Result

December Targets:

December Target

April Targets:

April Target

July Targets:

July Target

Is this a team objective and key result?:

No

Team Member List:

* Key Result Met?

Save Draft

Save & Continue

Objectives & Key Results Achieved Tab: the supervisor will scroll down the page to indicate if the employee has met their key results using the drop down menu, they will then select “Save Draft” if they wish to make edits or select “Save & Continue” to move to the next tab. The supervisor is also able to view the employee’s assessment by selecting the “Self Evaluation” link from the left menu.



Complete Supervisor Evaluation (Cont.)

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

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

Objective & Key Results Assessment

On this tab enter the rating reflective of the employee's 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 12 months and provide feedback on opportunities for growth (2000 character maximum)
Evaluative Feedback

☐ Remove Entry?

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

Objectives & Key Results Assessment Tab: the supervisor will assess the employee's performance of established OKRs, select a rating from the drop down menu, and provide the necessary 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 employee's overall evaluation score.



Complete Supervisor 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)


 Save Draft

 Complete

Select “Save Draft” to review (***this also allows the supervisor to view the score in progress***) or edit information before finalizing and 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.

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

Global Objectives Assessment Tab: the supervisor will scroll down the page, select a rating for each global objective and provide appropriate feedback regarding the employee’s performance in these areas. The supervisor may also add supporting documentation by selecting the “Attachments” link. Global objectives make up 65% of the employee’s overall evaluation score.

Actions 

Print

Save Draft

Complete



Complete Supervisor Evaluation (Cont.)

Global Objective:

Showed Initiative

Example behaviors at Meets Expectations:

- Responds appropriately on own to improve outcomes, processes, or measurements in the unit or another area of the University.
- Assumes responsibility and leadership when asked.
- Accomplishes goals independently, with little need for supervision.
- Takes ownership and accountability for own performance.
- Seeks out and/or accepts additional responsibilities.

* Rating - Select one from drop-down menu

Meets Expectations

* Evaluative Feedback - Summarize performance toward this objective in the past 12 months and provide feedback on opportunities for growth (2000 character maximum)

Evaluative Feedback

Save Draft Complete

Actions

Print

Save Draft

Complete

Select “Save Draft” to review (***this also allows the supervisor to view the score in progress***) or edit information before finalizing and 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.

You may also print pages by selecting the Print option from the Actions drop down menu found at the top of the page.



Score in Progress



Monica

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

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

Home Performance Progress Notes

Hello, Patricia Log Out

The Supervisor Evaluation has been saved!

Supervisor Evaluation for Monica (Score in progress: Meets Expectations)

Actions

Instructions:

Tab 1 - Objectives & 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 & Key Results Assessment:

- Scroll down the page to select an overall rating for the performance of objectives and key results and provide appropriate feedback regarding the employee's 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 the employee's 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 the score in progress (scroll to the top of the page) or edit information before finalizing.
- Select "Complete" when all actions have been completed and you are ready to submit your evaluation of the employee to the second level approver.

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

Attachments 0

Required fields are indicated with an asterisk (*).

[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 13:13

Last Completed Step: Complete Supervisor 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



Step 4

End of Year Review Meeting



End of Year Review Meeting



- My Reviews
- My Employees' Reviews

Home 4 Performance Progress Notes

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

Your Action Items


Start typing to search

Item	Description	Due Date	Status
UNT HSC FY 2021 Supervisor Performance Evaluation Program for Patricia	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	End of Year Review Meeting	2021-08-13 Due in 11 months	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program (35/65) for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 5 days	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 5 days	Upcoming

The Supervisor will be notified via email of the next task that requires their attention. They will log in and select the task from the list of action items to complete the End of Year Review Meeting.



End of Year Review Meeting (cont.)

 UNT SYSTEM

Monica

Supervisor: Patricia
Position Description: [Operations](#)

Department: UNT Health Science Center

[Overview](#)

[Plan](#)
[Supervisor Evaluation](#)
[Self Evaluation](#)
[Multi-rater Feedback ▾](#)
[Approvals & Acknowledgements](#)

[History](#)

[My Reviews](#)
[My Employees' Reviews](#)

Home **4** Performance ▾ Progress Notes

Hello, Patricia Log Out

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.
- Initiate a conversation with the employee to develop Objectives and Key Results for the next fiscal year ([Develop OKR template](#))
- Once the review meeting with the employee is complete, select "Complete".

Complete

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 13:43

Last Completed Step: Second Level Supervisor Approves Evaluation

Co-reviewer: N/A

Before clicking on the "Complete" button, the supervisor should 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 should be consulted before the meeting with the employee.

* This is also the step to initiate discussions for developing OKRs for the next review period.



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>