PeopleAdmin Performance Management User Guide

HSC Supervisor and Non-Supervisor Program 2021

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*

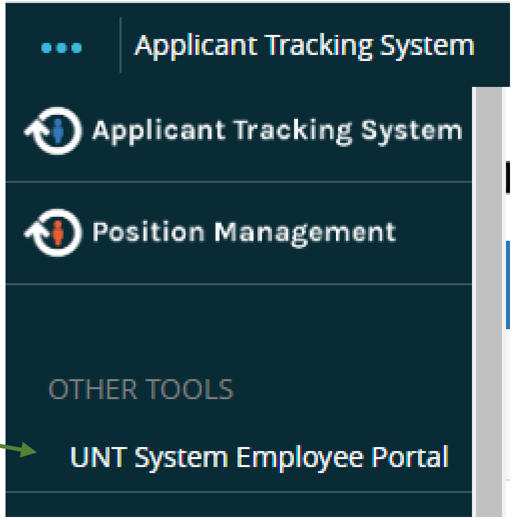
Additional information can be found at https://hr.untsystem.edu/performance-management

How to Access Performance Module

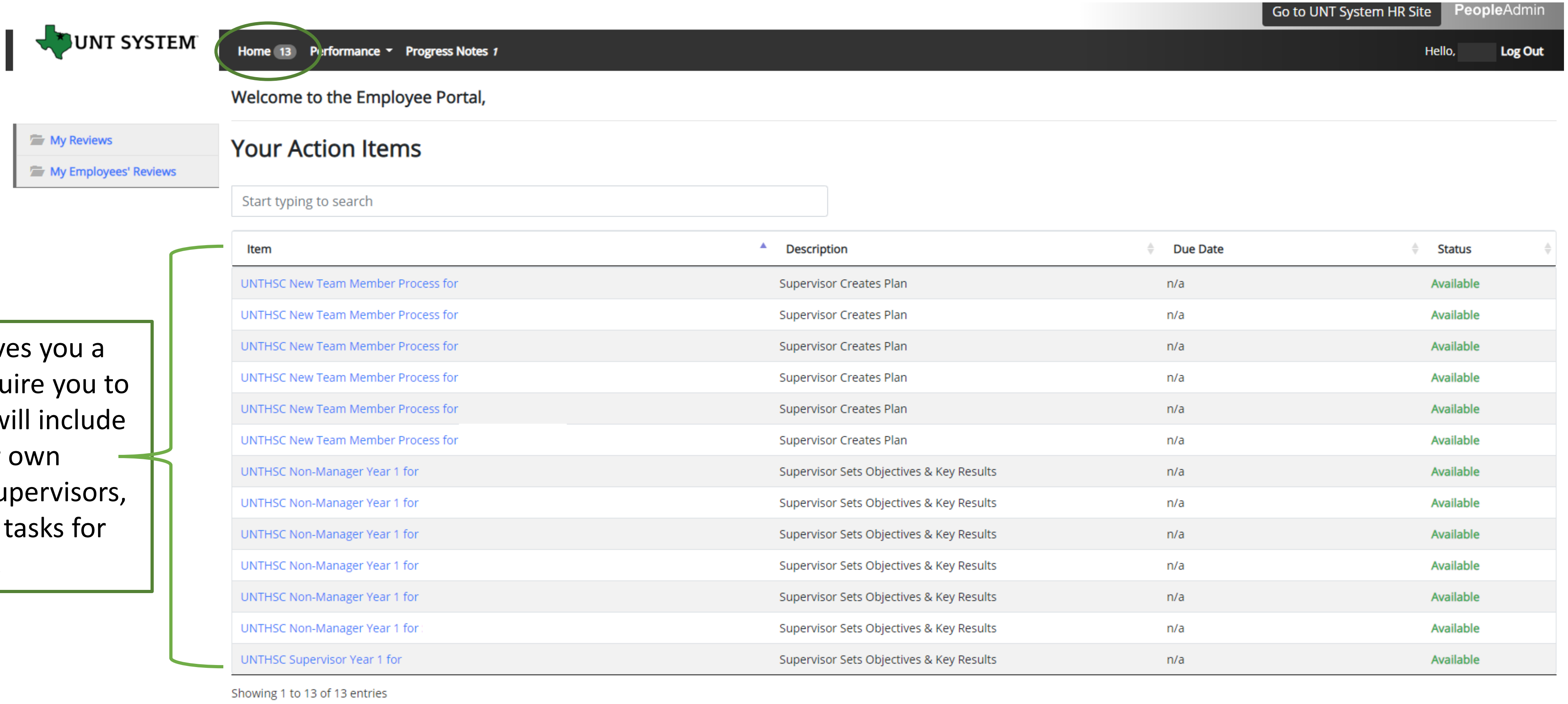
- Via employee portal link: https://my.untsystem.edu; go to PeopleAdmin section and select the link for Performance Management
- Or go to: https://jobs.untsystem.edu/portal
- Log-in with EUID and Password
- All supervisors and employees can access system

How to Access Performance Module (cont.)

You may also access the employee portal through the PeopleAdmin System at https://jobs.untsystem.edu/hr.
When in PeopleAdmin, simply select UNT System Employee Portal after clicking on the three dots in the top left corner.



Navigation



Go to UNT System HR Site PeopleAdmin

UNT SYSTEM

Home 13 Performance Progress Notes

Hello, [redacted] Log Out

My Reviews

My Employees' Reviews

Welcome to the Employee Portal,

Your Action Items

Start typing to search

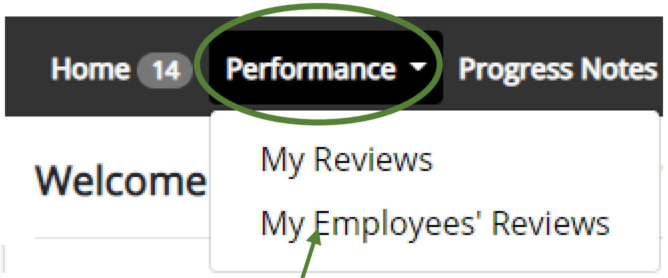
Item	Description	Due Date	Status
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC New Team Member Process for	Supervisor Creates Plan	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Non-Manager Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available
UNTHSC Supervisor Year 1 for	Supervisor Sets Objectives & Key Results	n/a	Available

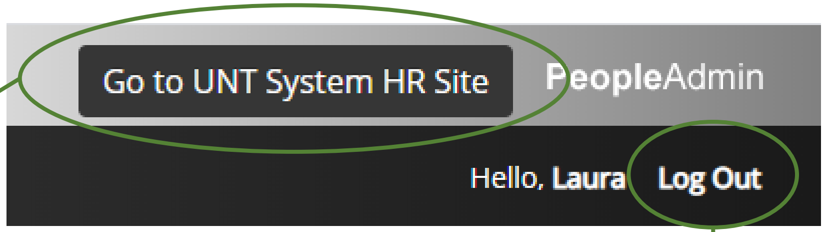
Showing 1 to 13 of 13 entries

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

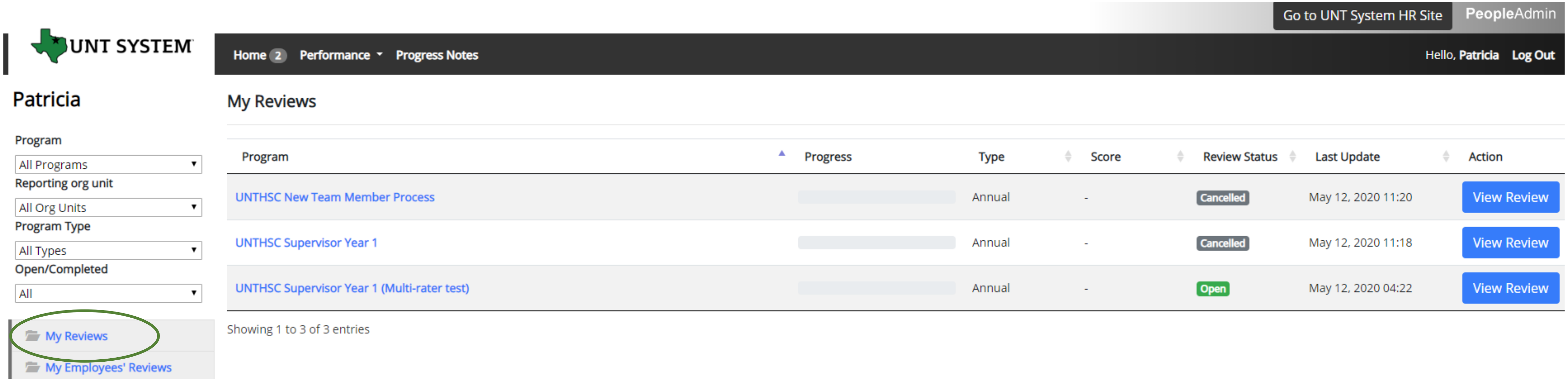




Clicking the Go to UNT System HR Site takes the user out of the employee portal and back to the Applicant Tracking System or Performance Management module.

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

Navigation (cont.)



Selecting the My Reviews link allows employees to view their own evaluation, as well as the status of the review. This is also where employees will be able to view evaluations which have already been completed within the PeopleAdmin System; click on the View Review link to access them.

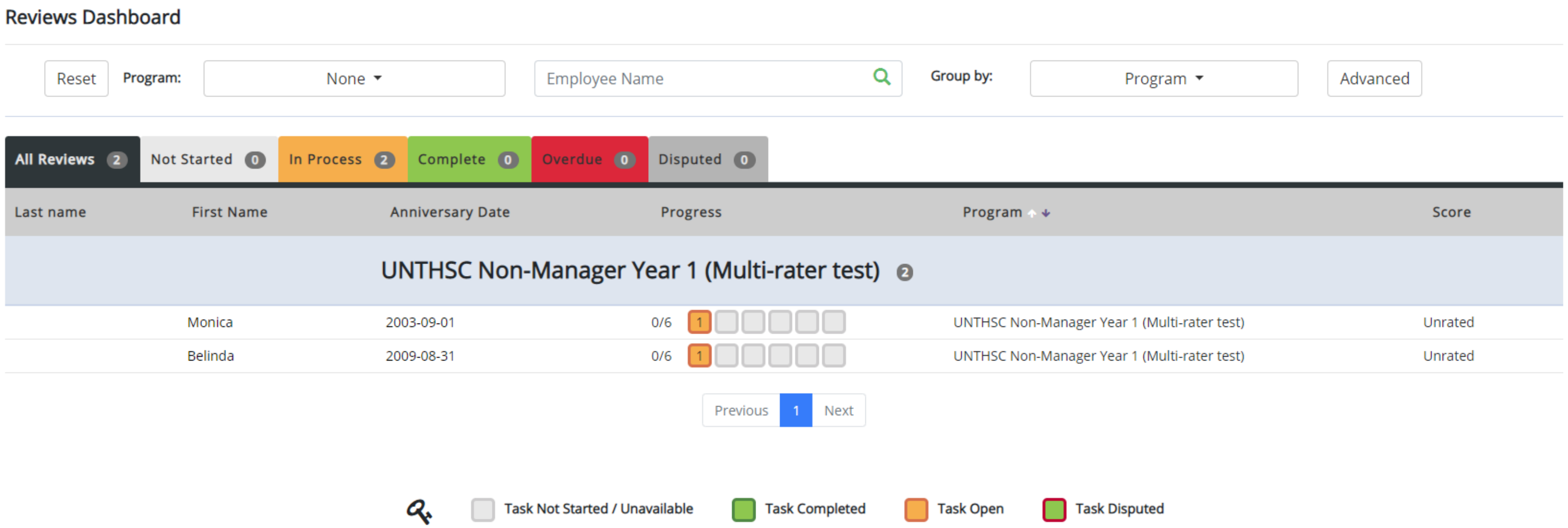
Navigation (cont.)

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

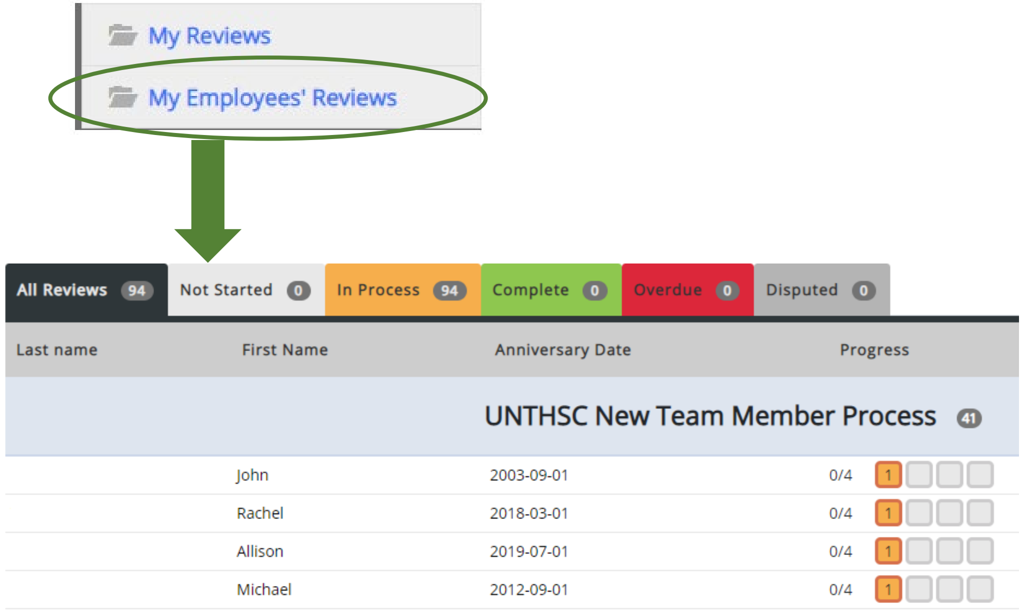
Please note that the Disputed tab will not be used

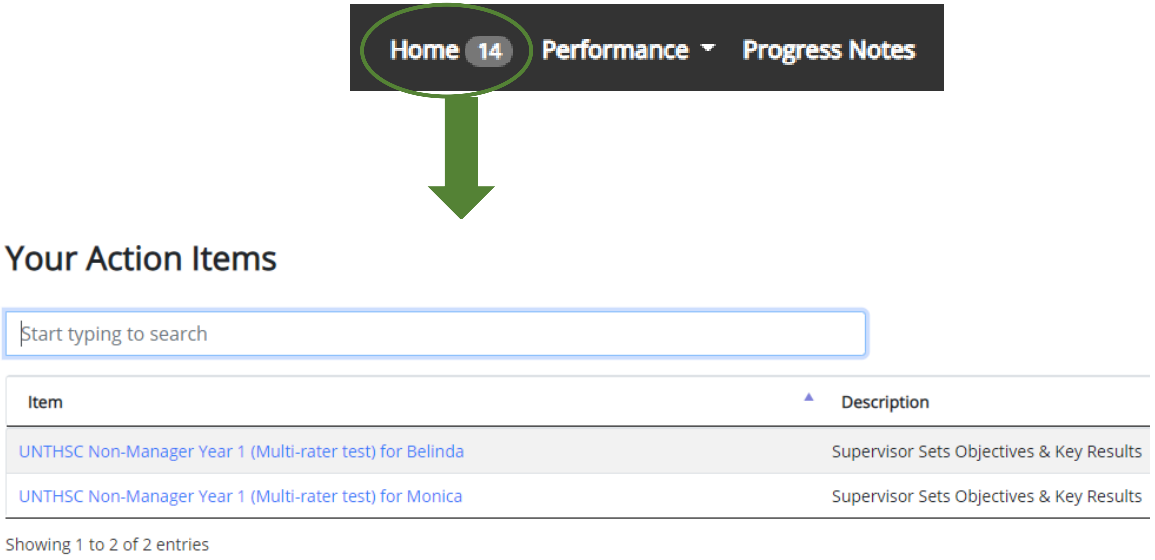
Supervisors may also use the available search filters in order to more quickly locate employee evaluations



UNT SYSTEM

Beginning the Review Process





To begin the evaluation process, the supervisor will complete available action item(s) by selecting 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 11-30-20)

1. **Establish Objectives & Key Results** – employee attaches OKR worksheet as a progress note and copies the agreed upon objectives and keys results into the system to initiate the employee performance evaluation.
2. **Supervisor Approves Objectives and Key Results** – the supervisor reviews and approves the attached OKR worksheet along with the objectives and key results which have been entered into the system.
3. **December Performance Check-In** – supervisor advises employee of initial progress towards achieving objectives and key results and makes any necessary adjustment.
4. **April Performance Check-In** – supervisor provides further updates on employee's progress and discusses any required adjustments.
5. **July Performance Check-In** – supervisor advises employee of their progress throughout the year thus far.
6. **Self Evaluation** – employee rates self on goals and objectives.
7. **Supervisor Evaluation** – supervisor rates employee.
8. **2nd Level Supervisor approval –** second level supervisor indicates agreement with the content of the evaluation.
9. **End of Year Review meeting –** supervisor and employee meet to review the supervisor evaluation.
10. **Employee Acknowledges Evaluation** – employee acknowledges receipt of evaluation materials and score.

HSC Objectives & Key Results Achievement

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

The delivery of the established objectives and key results will be assessed based on the attached OKR worksheet and subsequent OKRs which will be copied into the system. OKRs will account for 35% of the overall evaluation score for all employees.

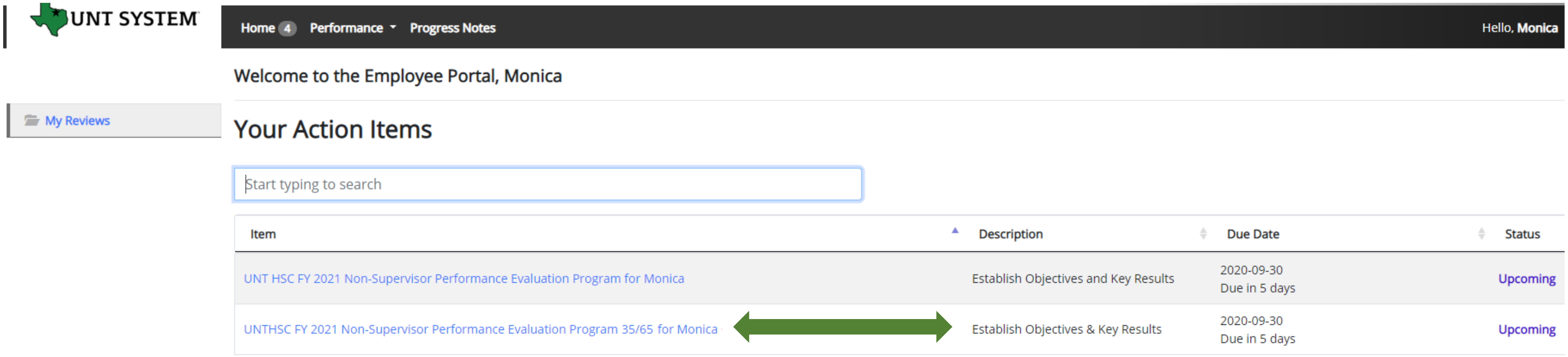
For additional information and training of OKRs, please visit the Performance Evaluation Tools and Resources webpage.

HSC Global Objectives

1. Solved Department Problems
2. Demonstrated Functional Knowledge and Skills
3. Demonstrated Service to Department Customers
4. Maintained a High Level of Trust with Department Customers
5. Behaved in a Collaborative Manner to Facilitate Department Success
6. Communicated Effectively with Others
7. Showed Initiative

Global objectives will make up 65% of the overall evaluation score for all employees.

Establish Objectives & Key Results



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 home screen.

Establish Objectives & Key Results (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
- My Reviews

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

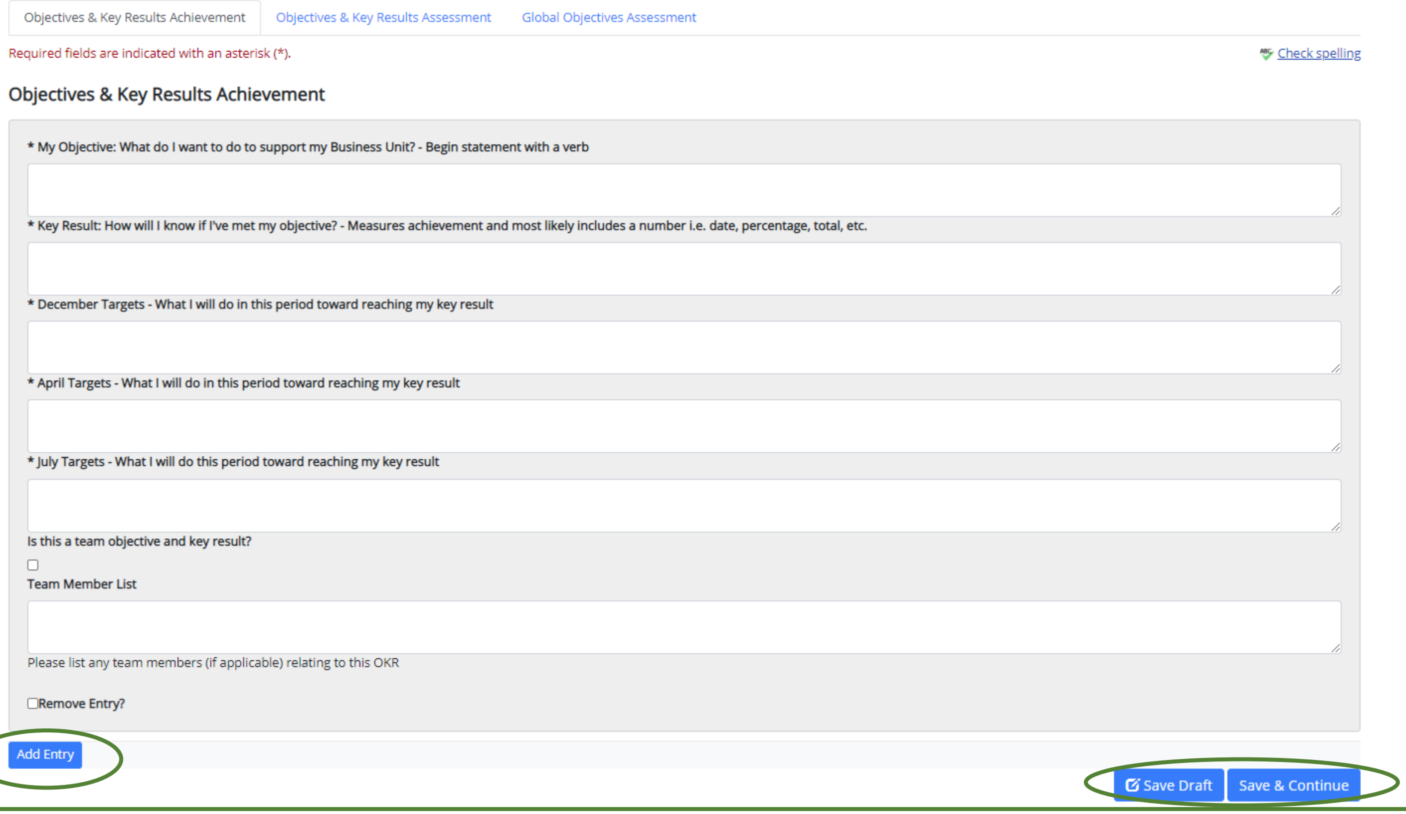
Program Timeframe: 09/01/20 to -

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**.

UNT SYSTEM

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

Check spelling

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.

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

Check spelling

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.

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

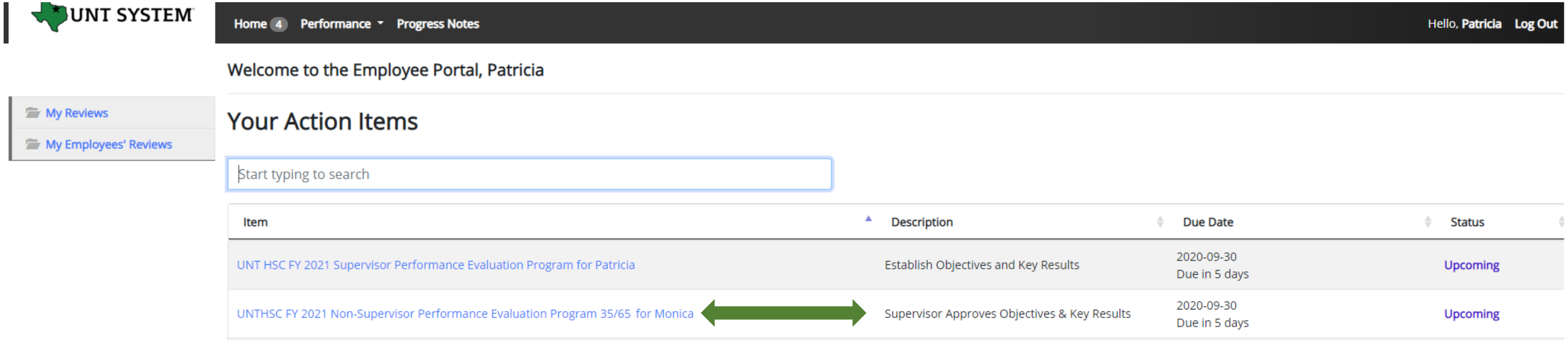
Actions

- Print
- 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

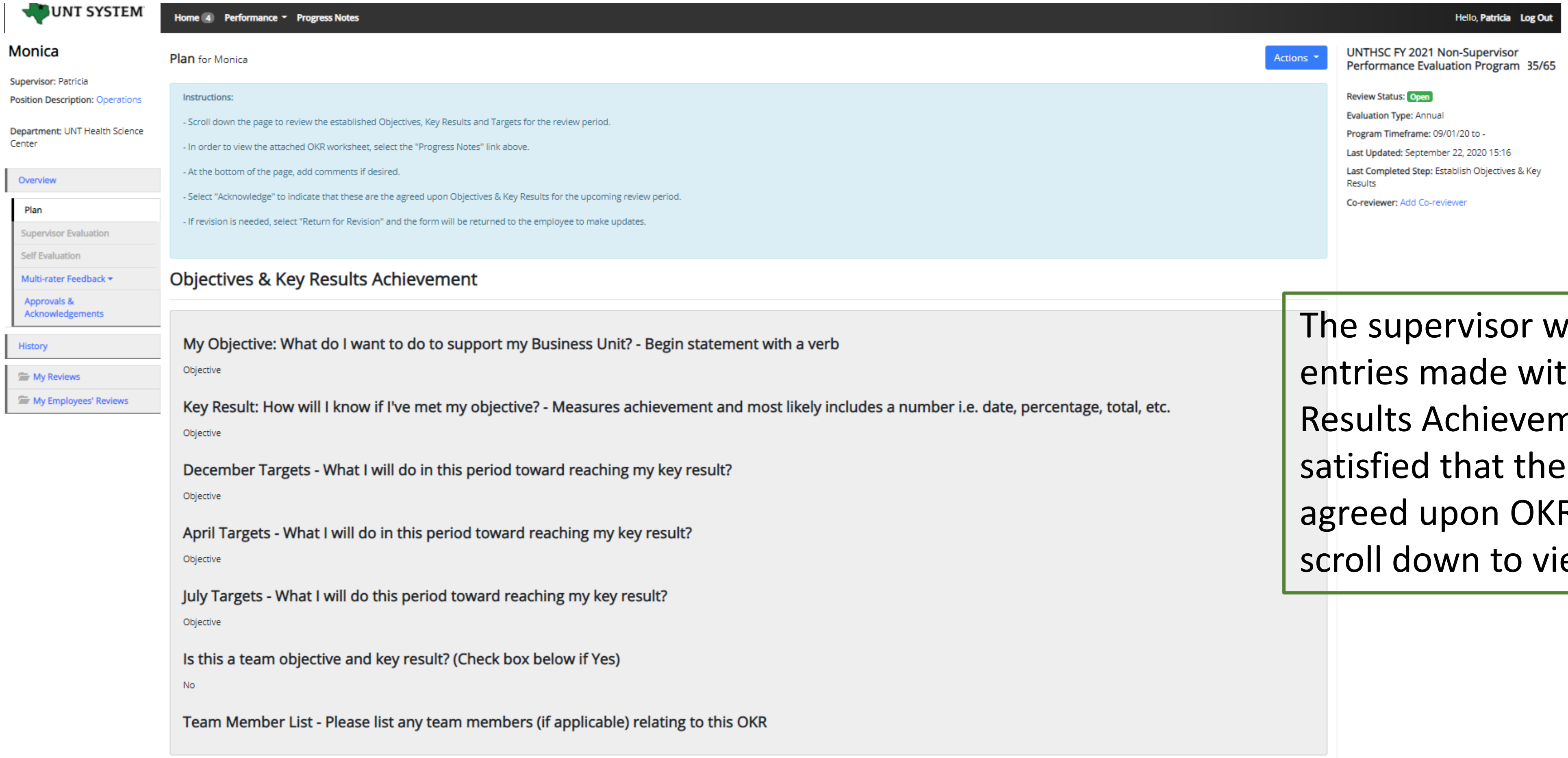
Supervisor Approves Objectives & Key Results

Once the employee has entered the established OKRs and targets into the system, the supervisor will receive notification 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.

Supervisor Approves Objectives & Key Results (Cont.)



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.
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Demonstrated Functional Knowledge and Skills

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- 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.

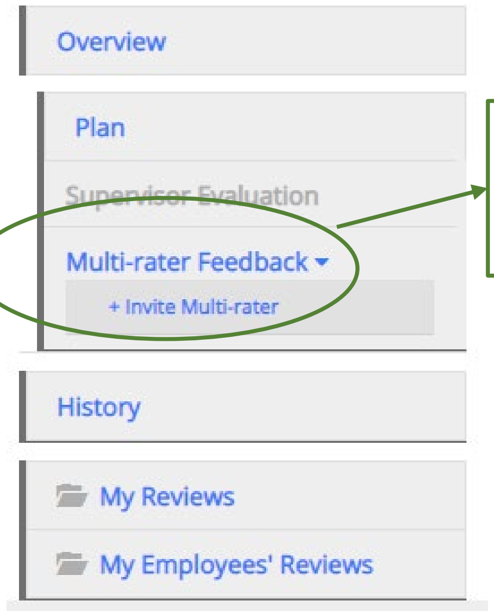
The supervisor will be able to review all factors used to assess both the OKRs as well as the global objectives. Note – these are not editable by the supervisor or employee.

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

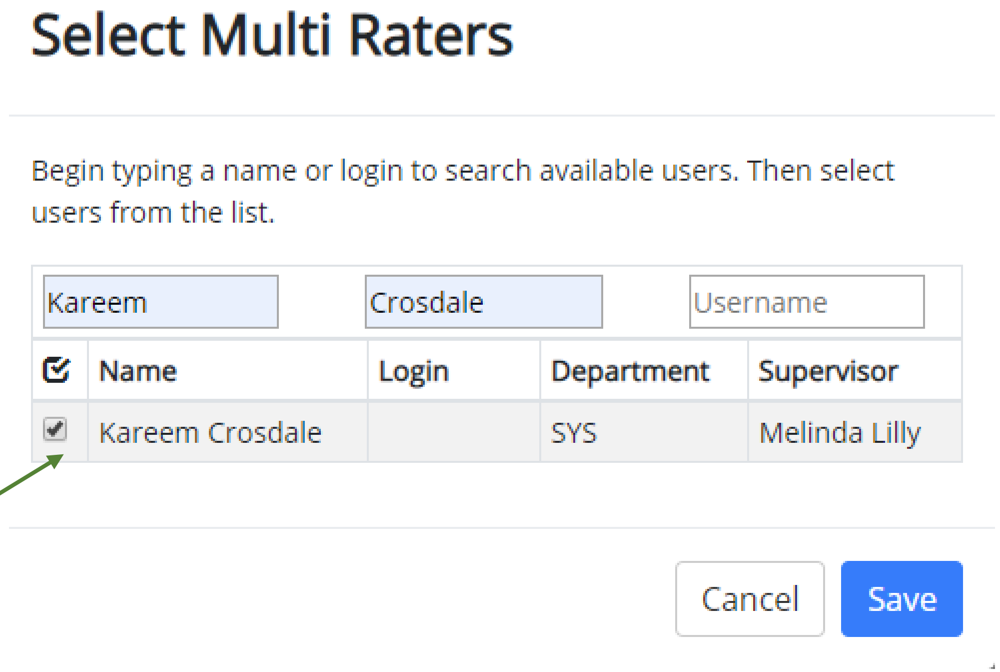
Multi-Rater Feedback

A supervisor can request performance feedback from other UNT World employees



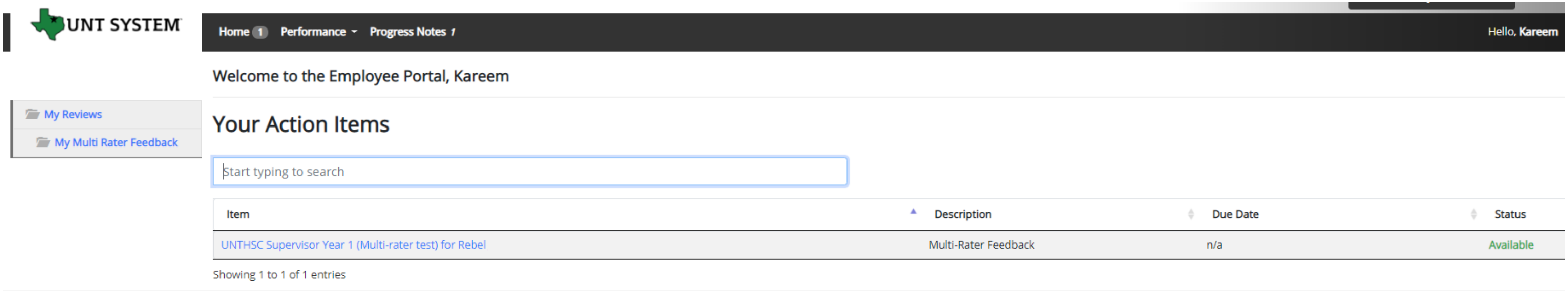
The supervisor will click on "Multi-rater Feedback" in the left menu and select the "Invite Multi-rater" link.

Enter the name of the person or persons to be invited, check the box by their name and click the "Save" button.



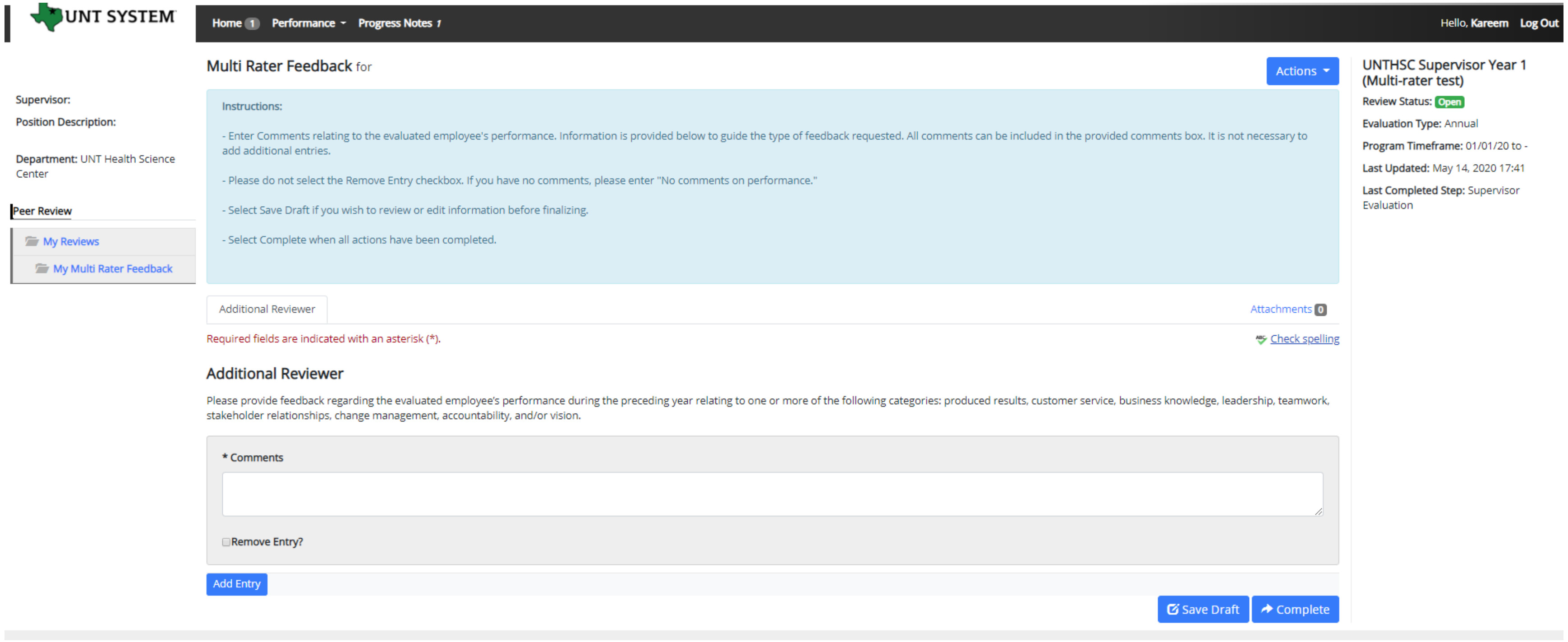
The Multi-rater will receive an email notifying them of the request and they can access the multi-rater form through their performance portal Home page.

Multi-Rater (cont.)



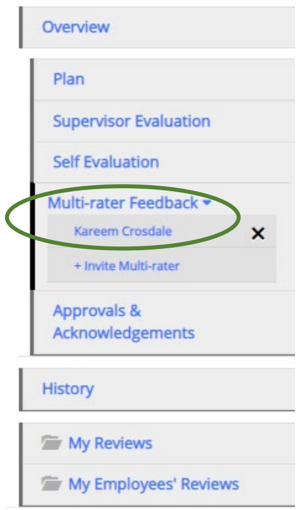
Once a Multi-rater has been added to an evaluation, the Multi-rater feedback will be listed as an action item and can be found on the Home page when the Multi-rater logs into the portal.

Multi-Rater (cont.)

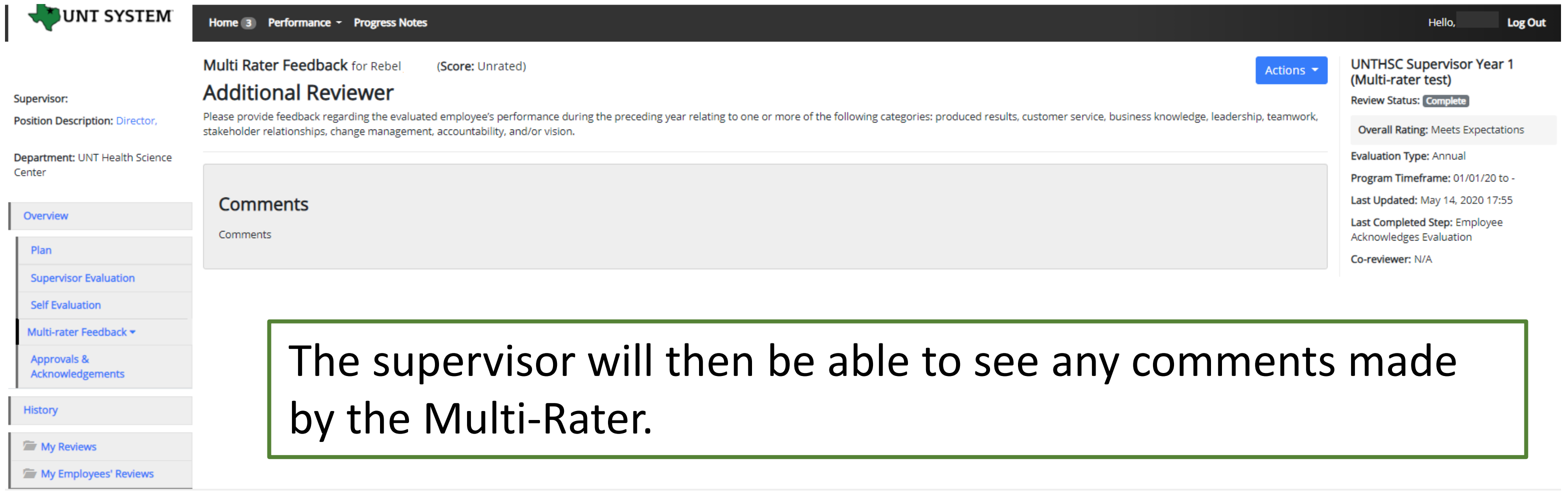


The Multi-rater will enter all comments/feedback within the available “Comments” box, there is no need to add a new entry. They will then have the option of saving as a draft for further review using the “Save Draft” link, or they may select “Complete” to conclude the multi-rater feedback.

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.

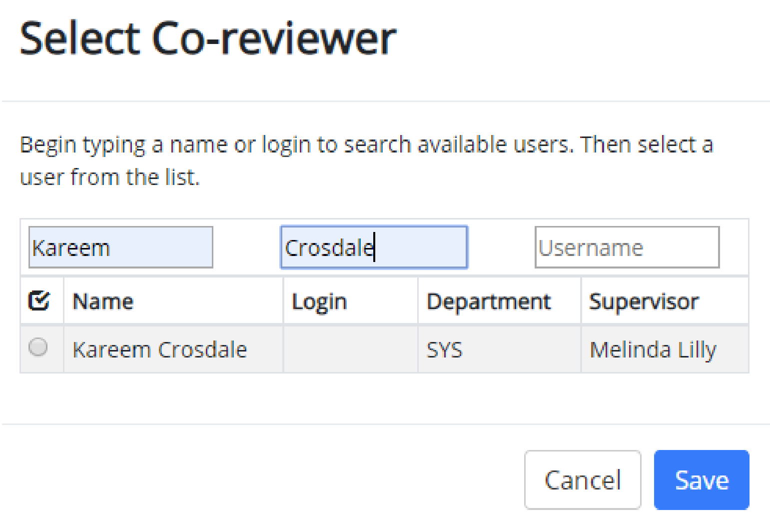


The supervisor will then be able to see any comments made by the Multi-Rater.

Multi-rater comments are only visible to the supervisor and the multi-rater, employees are not able to access these comments.

Co-Reviewer

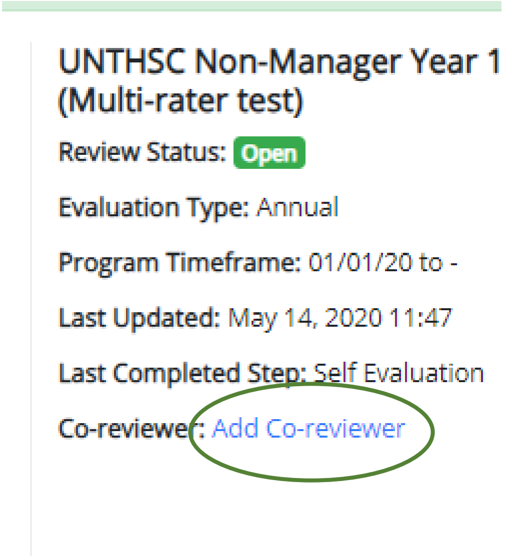
Adding a co-reviewer allows the supervisor to identify another individual who can perform all the same evaluation steps as the supervisor. This function can be utilized if another reviewer should have **full** feedback capabilities to the employee's evaluation. The co-reviewer has the ability to perform 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.

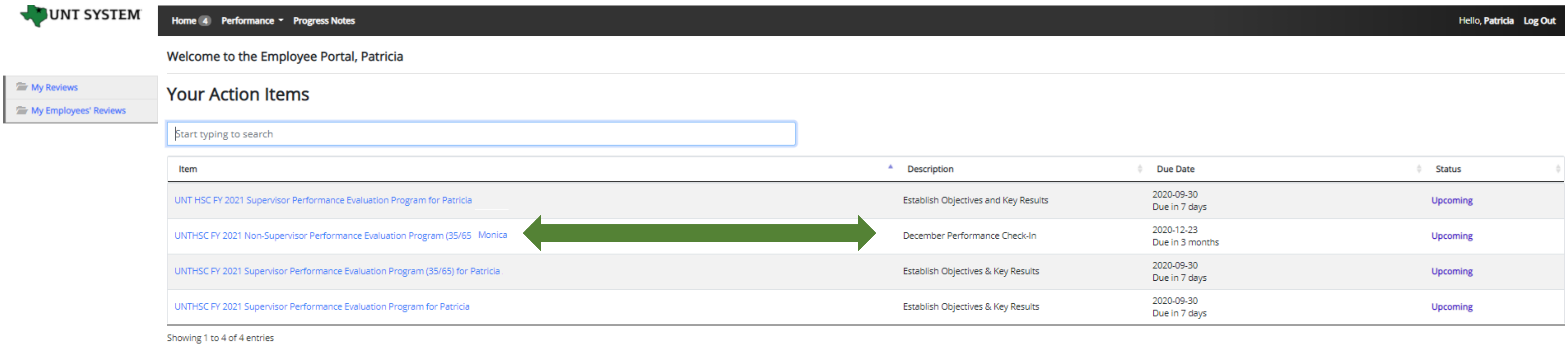


This might be used for someone who has a split reporting relationship or someone who recently transferred to a new job. The supervisor and co-reviewer will need to discuss who will be responsible for completion and submission of the evaluation steps. Note that only one person can submit the supervisor evaluation by clicking complete. Otherwise, save as draft and the co-reviewer will be notified that there is a pending action item for them to complete. The supervisor or co-reviewer may also add attachments by selecting the attachment link.

UNT SYSTEM

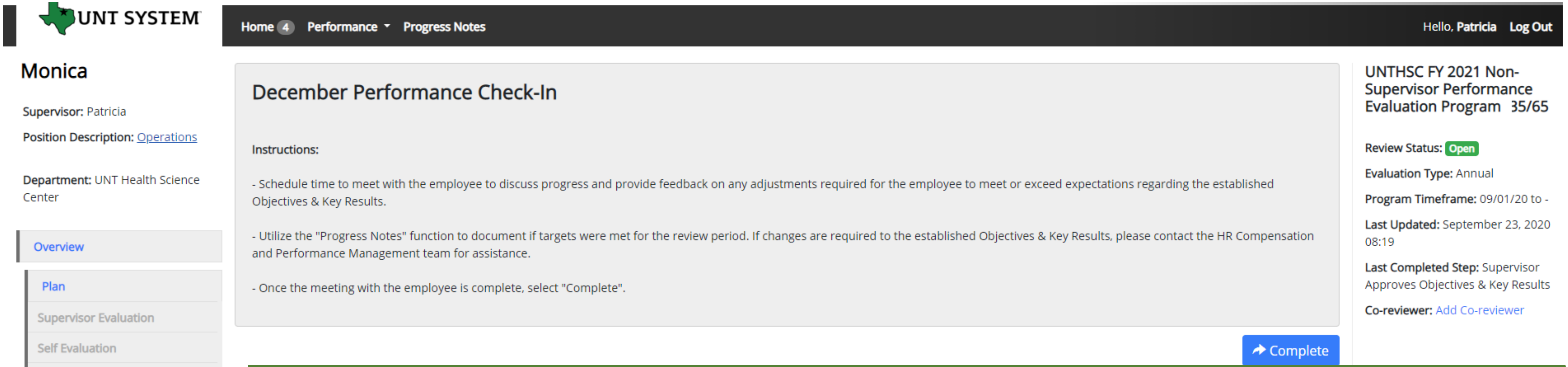
December Performance Check-In

Supervisors are required to have periodic meetings with all employees to assess and give feedback on progress towards achieving objectives, key results and tasks.



From the Home screen, the supervisors will select the relevant evaluation link for the specific employee.

December Performance Check-In (Cont.)



Progress notes (see Appendix) 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.

If OKRs need updating, the supervisor should reach out to the Compensation and Performance Management team (hrcomp@untsystem.edu) for assistance.

UNT SYSTEM

April Performance Check-In

The next meeting that is required by supervisors is the April Performance Check-In, this is to further inform employees of their continued progress towards achieving their goals and objectives

UNT SYSTEM

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

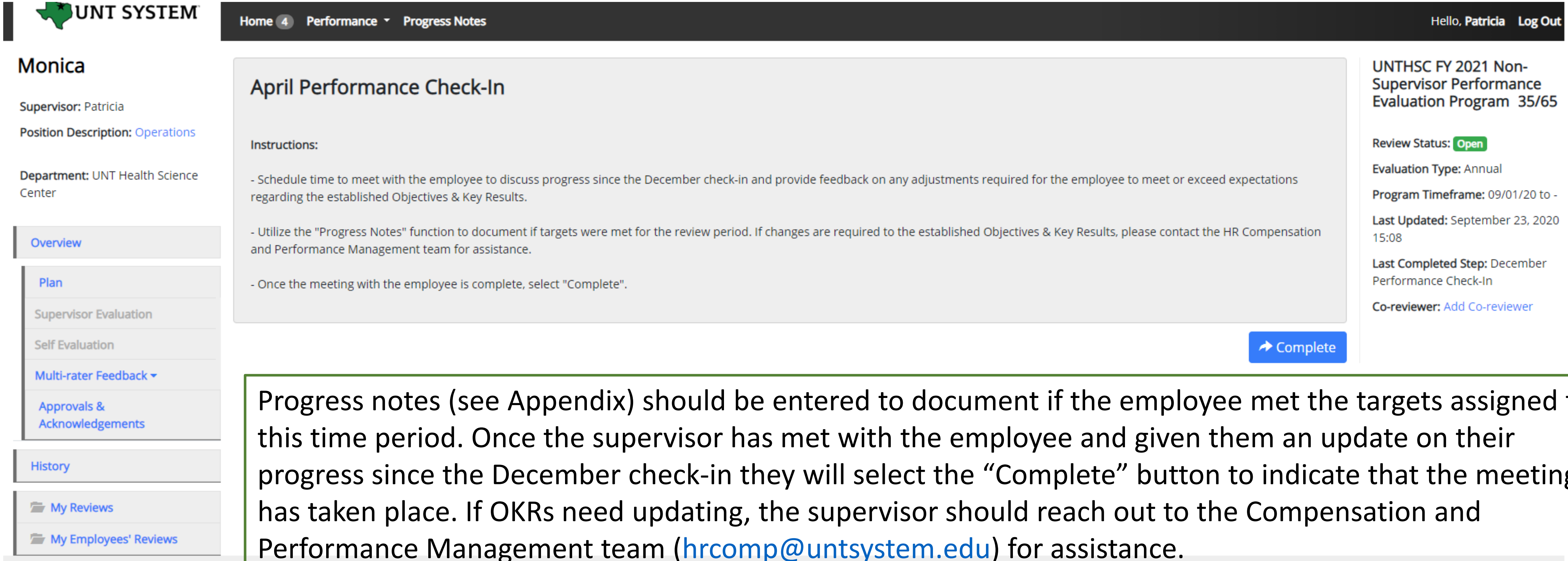
Item	Description	Due Date	Status
UNT HSC FY 2021 Supervisor Performance Evaluation Program for Patricia	Establish Objectives and Key Results	2020-09-30 Due in 6 days	Upcoming
UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program 35/65 Monica	April Performance Check-In	2021-04-30 Due in 7 months	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program (35/65) for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 6 days	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 6 days	Upcoming

Showing 1 to 4 of 4 entries

From the home screen, the supervisors will select the relevant evaluation link for the specific employee.

UNT SYSTEM

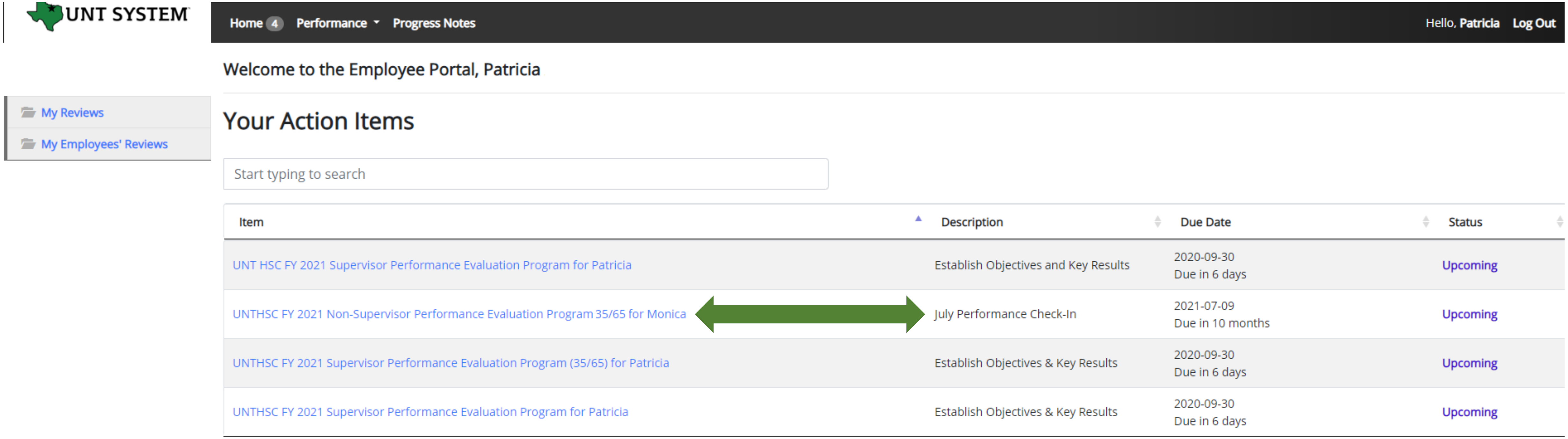
April Performance Check-In (Cont.)



Progress notes (see Appendix) 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 since the December check-in they will select the “Complete” button to indicate that the meeting has taken place. If OKRs need updating, the supervisor should reach out to the Compensation and Performance Management team (hrcomp@untsystem.edu) for assistance.

July Performance Check-In

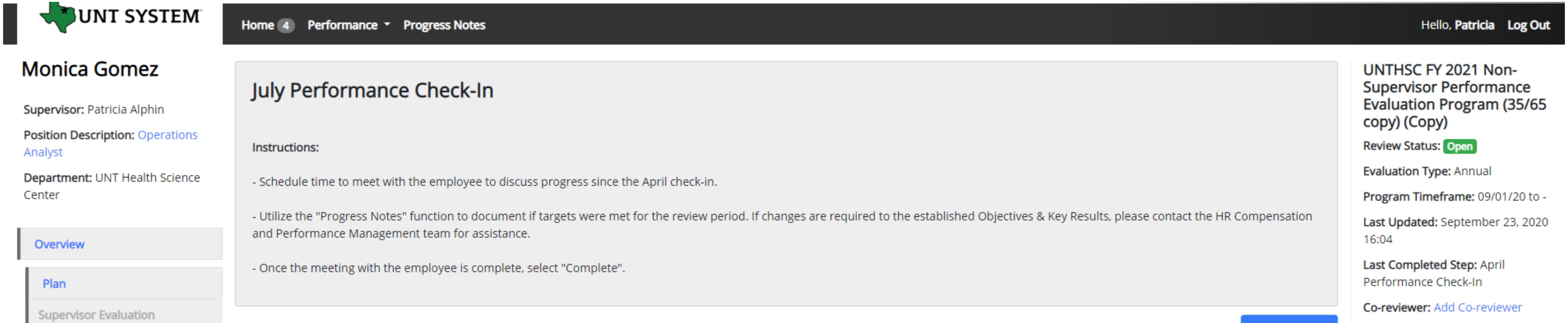
The final check-in meeting is for July, supervisors will meet with employees and update them on their continued progress towards achieving their goals and objectives



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 6 days	Upcoming
UNTHSC FY 2021 Non-Supervisor Performance Evaluation Program 35/65 for Monica	July Performance Check-In	2021-07-09 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 6 days	Upcoming
UNTHSC FY 2021 Supervisor Performance Evaluation Program for Patricia	Establish Objectives & Key Results	2020-09-30 Due in 6 days	Upcoming

From the home screen, the supervisors will select the relevant evaluation link for the specific employee.

July Performance Check-In (Cont.)

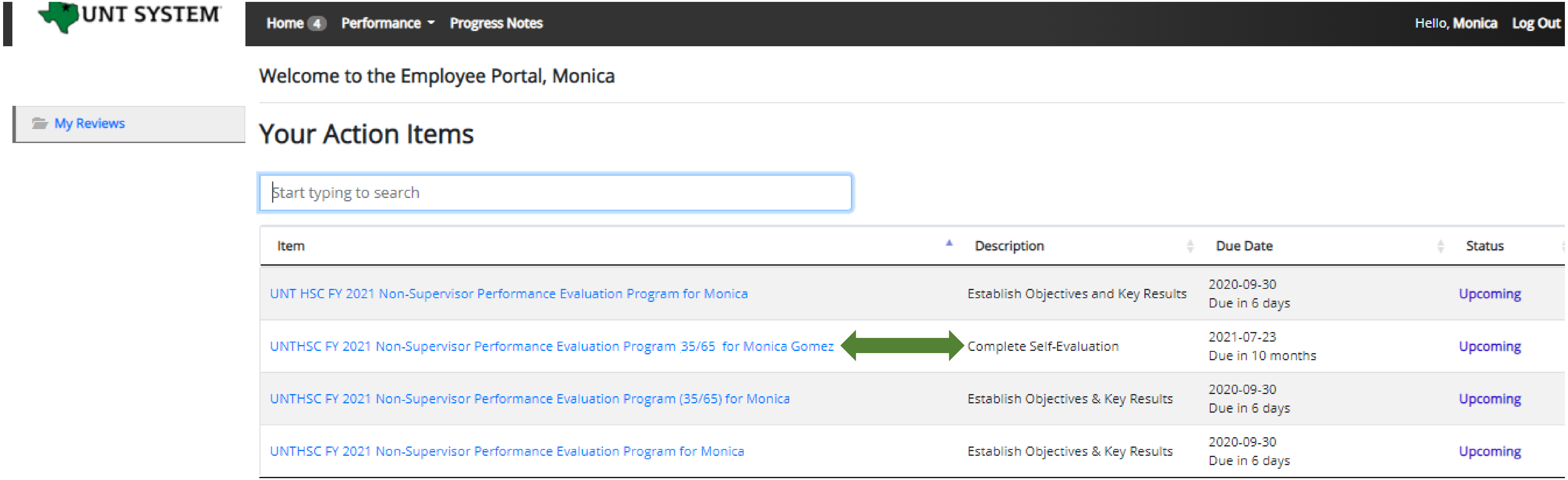


Progress notes (see Appendix) should be entered to document if the employee met the targets assigned to this time period. Once the supervisor has met with the employee and given them an update on their progress since the April check-in they will select the “Complete” button to indicate that the meeting has taken place.

If OKRs need updating, the supervisor should reach out to the Compensation and Performance Management team (hrcomp@untsystem.edu) for assistance.

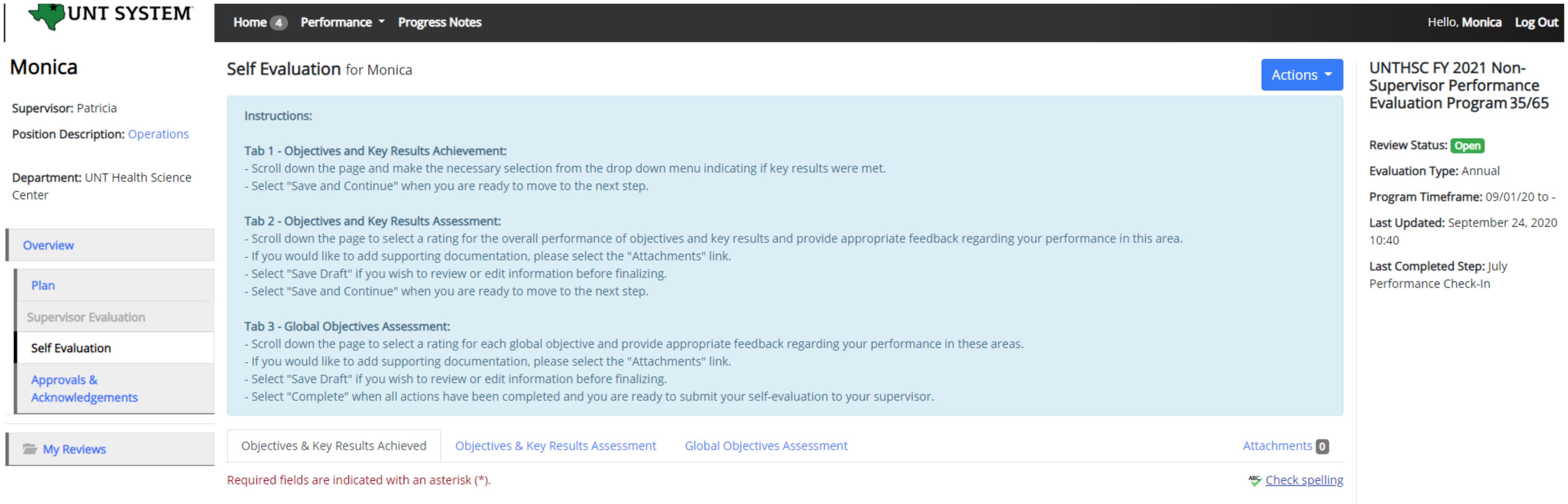
Complete Self-Evaluation

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

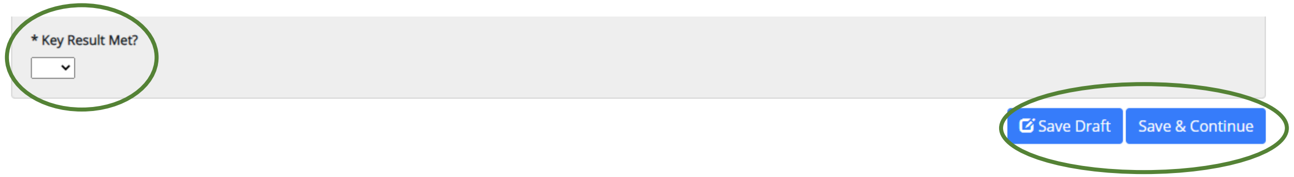


The employee will select the relevant task link from the list of actions to begin the Self Evaluation.

Complete Self-Evaluation (Cont.)



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.



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

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.

UNT SYSTEM

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

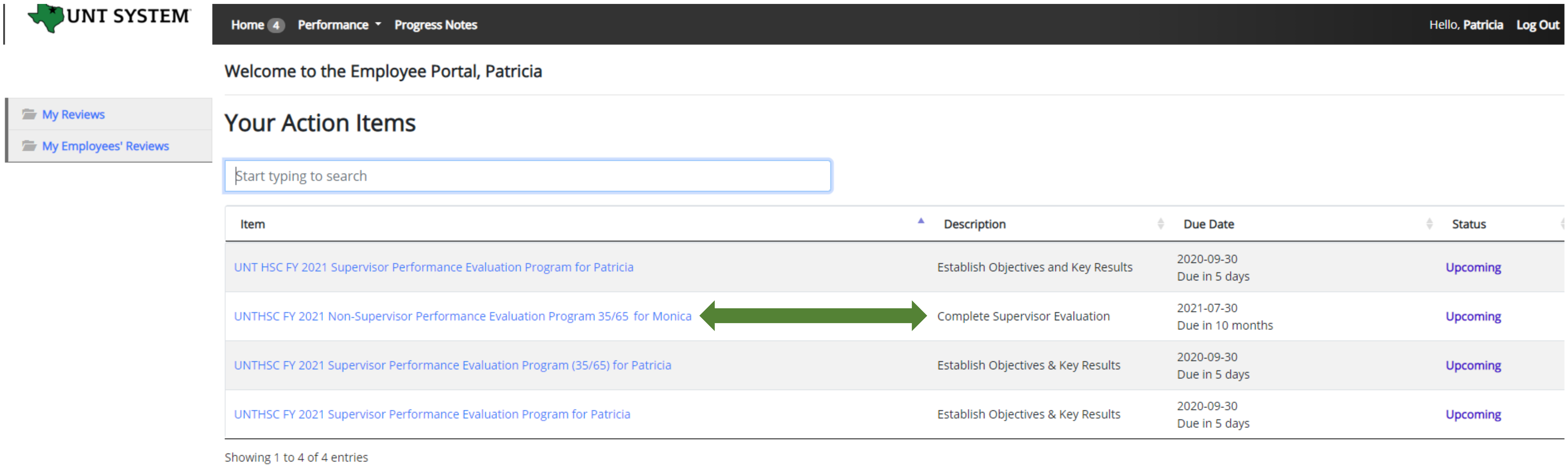
Print

Save Draft

Complete

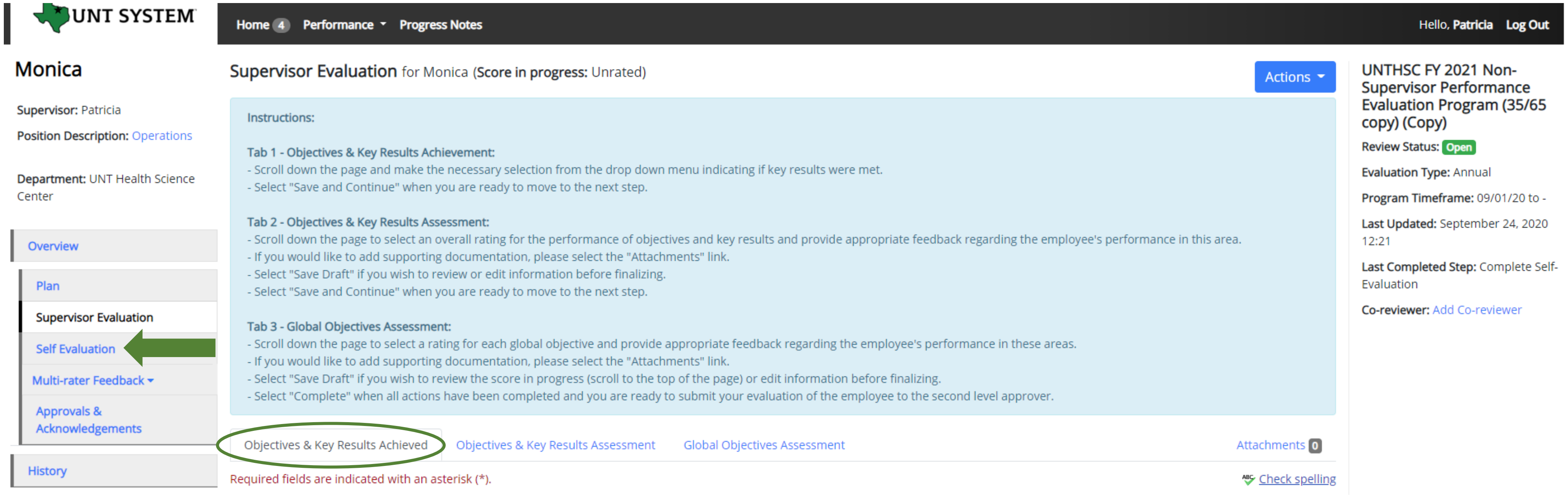
Save Draft | Complete

Complete Supervisor Evaluation

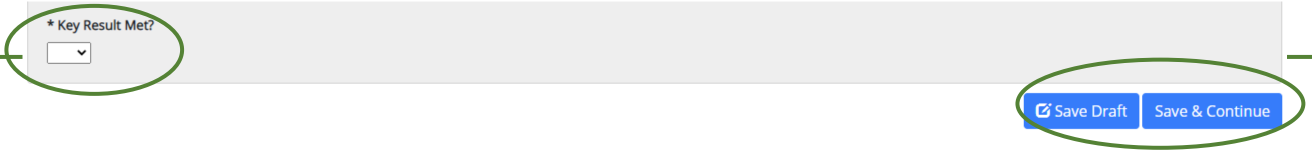


Once the self evaluation is complete, the supervisor will be notified. The Supervisor will select the Complete Supervisor Evaluation task from the home page to begin the Supervisor Evaluation. When completing the evaluation, supervisors are encouraged to review the self evaluation, progress notes and any collected multi-rater feedback to aid in the evaluation process.

Supervisor Evaluation (cont.)



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 able to view the employee’s assessment by selecting the “Self Evaluation” link from the left menu.



UNT SYSTEM

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.

UNT SYSTEM

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)

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.

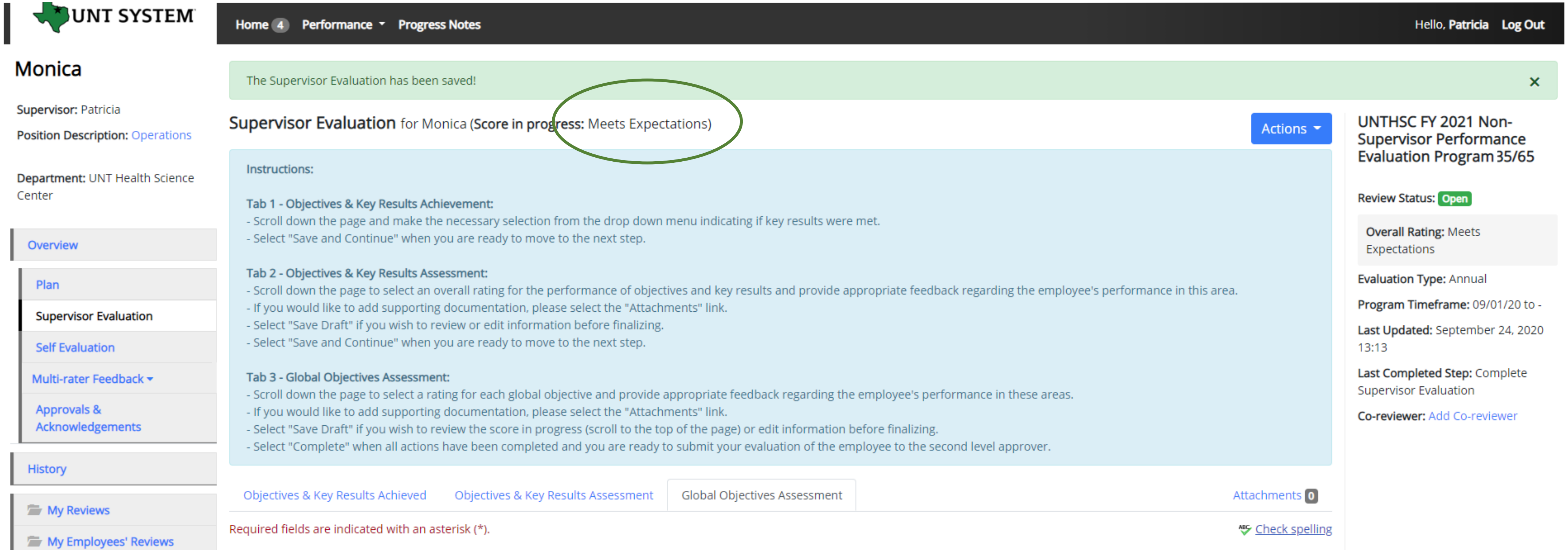
Save Draft | Complete

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.

Actions

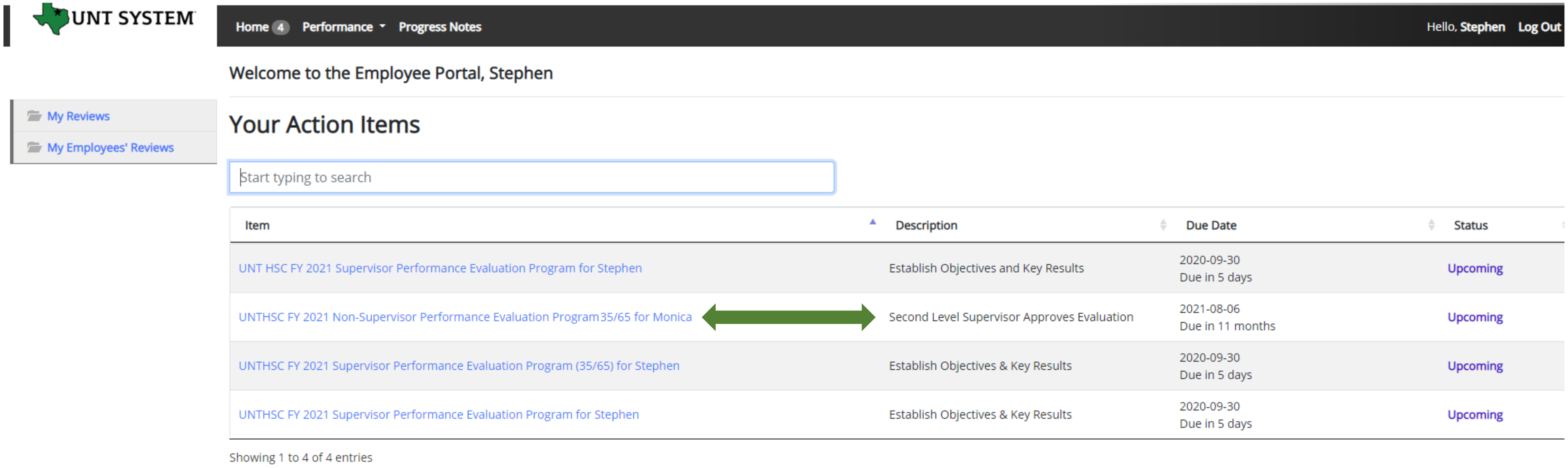
- Print
- Save Draft
- Complete

Score in Progress



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.

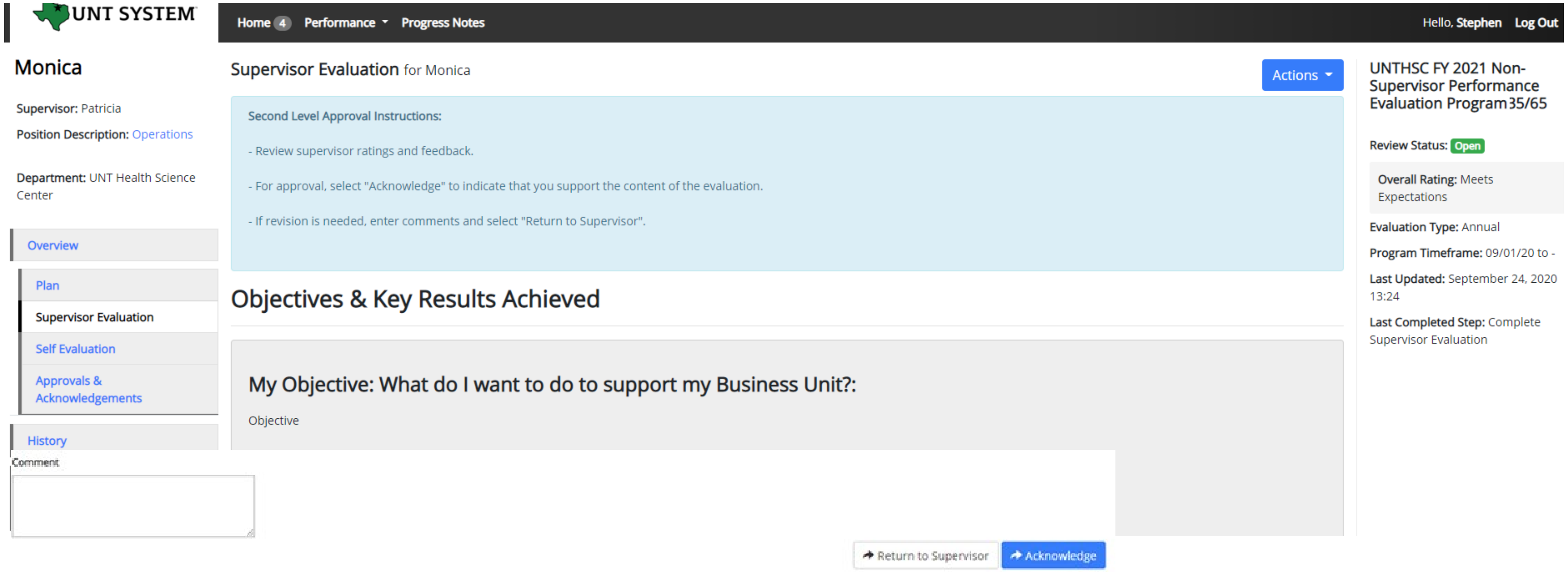
Second Level Supervisor Approves Evaluation (cont.)



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.

UNT SYSTEM

Second Level Supervisor Approves Evaluation (cont.)



The Second Level Supervisor will view the overall rating (top right section of the screen) scroll through the page to review all the selections made and the feedback given by the supervisor. If the second level supervisor is 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

UNT SYSTEM

Home 4 | Performance | Progress Notes | Hello, Patricia | Log Out

Welcome to the Employee Portal, Patricia Alphin

- My Reviews
- My Employees' Reviews

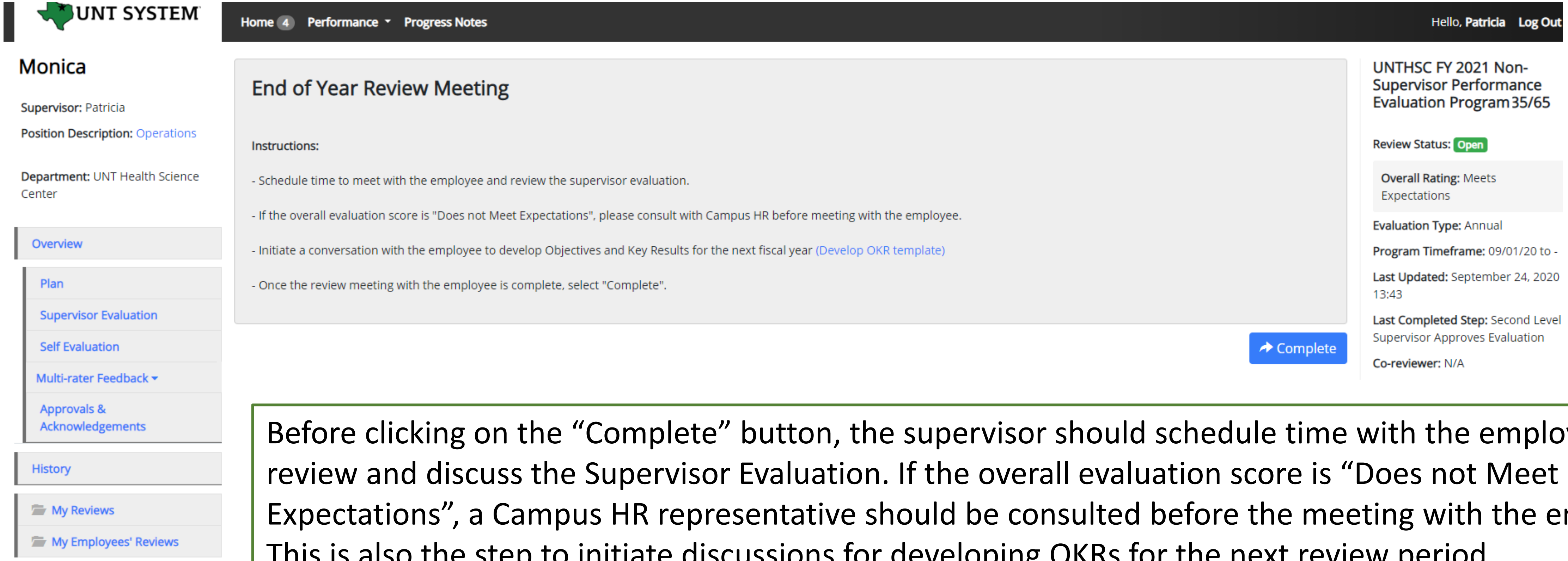
Your Action Items

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	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

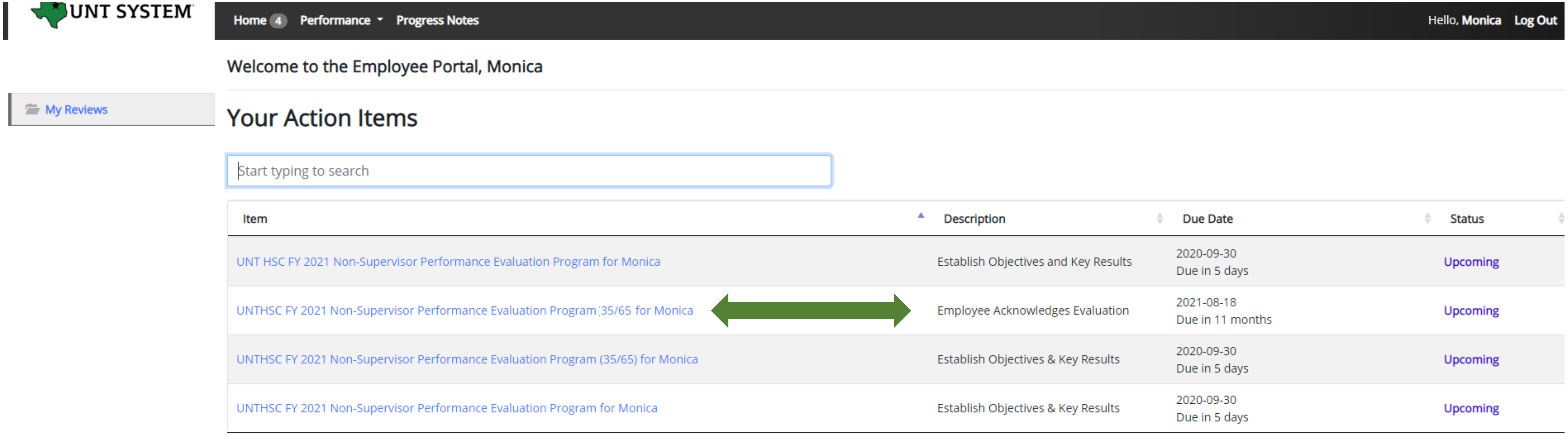
The Supervisor will be notified via email of the next task that requires their attention. They will log in and select the task from the list of action items to complete the End of Year Review Meeting.

End of Year Review Meeting (cont.)



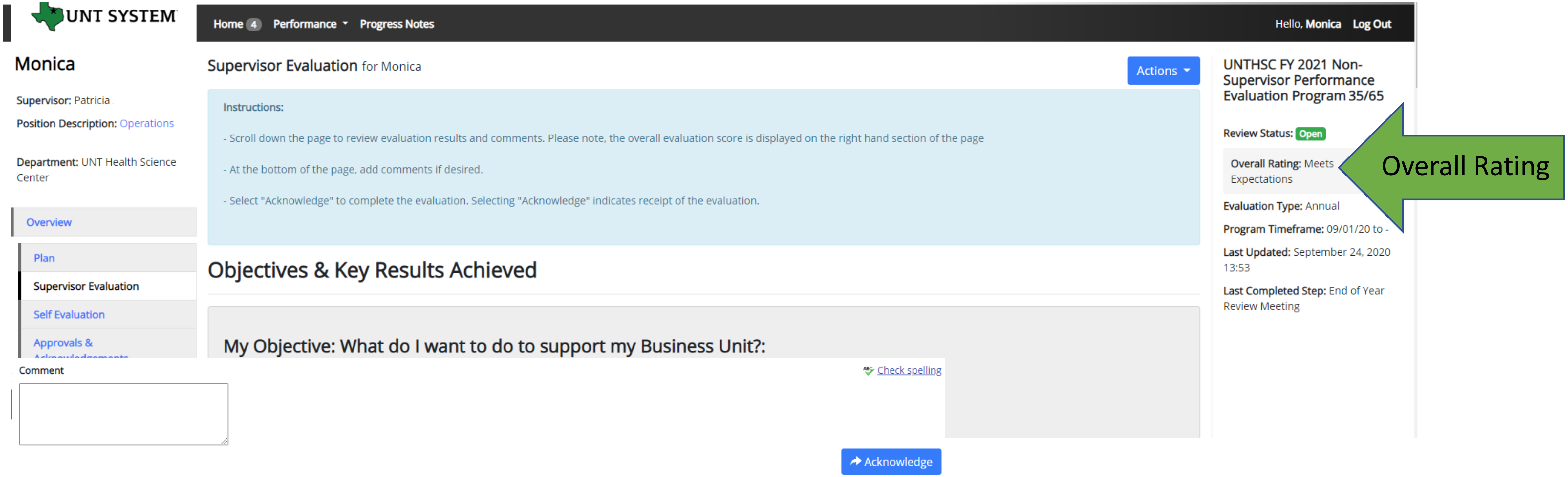
Before clicking on the “Complete” button, the supervisor should schedule time with the employee to review and discuss the Supervisor Evaluation. If the overall evaluation score is “Does not Meet Expectations”, a Campus HR representative should be consulted before the meeting with the employee. This is also the step to initiate discussions for developing OKRs for the next review period.

Employee Acknowledges Evaluation



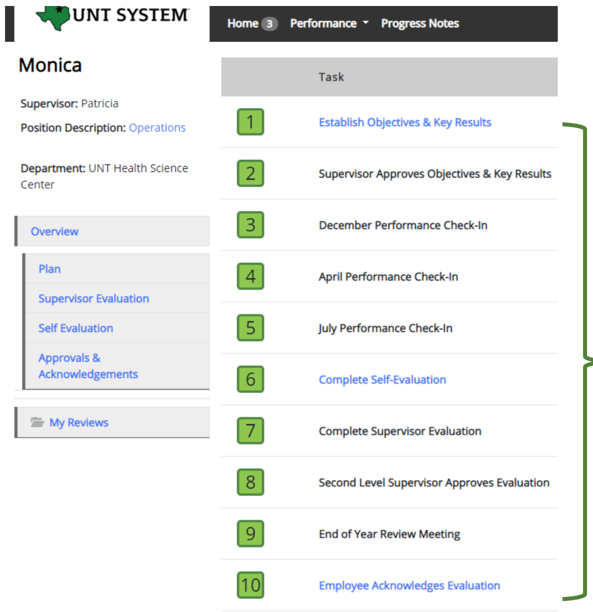
Once the End of Year Review Meeting has concluded, the employee will receive an email notification directing them to complete the next task. The employee will log in to the portal and select the final task to conclude the process.

Employee Acknowledges Evaluation (cont.)

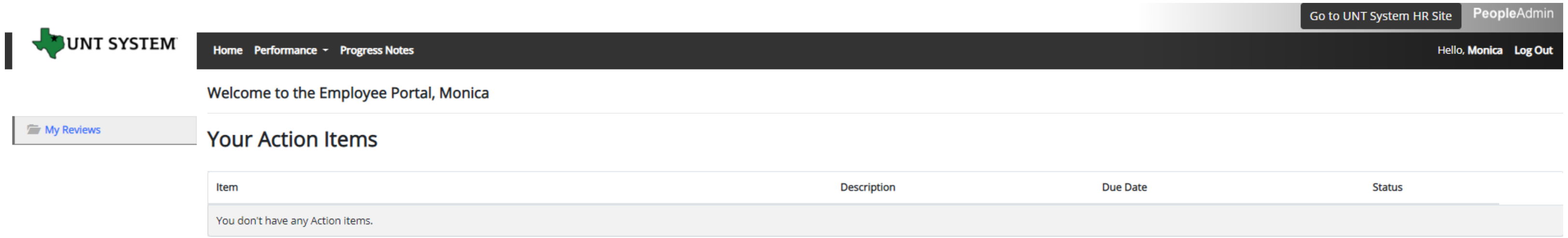


The overall rating can be viewed on the right side of the page. The employee can review the content of the evaluation, scroll to the bottom of the page and add any optional comments if desired, and click on the "Acknowledge" button to indicate receipt of the evaluation.

Completed Evaluation



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.

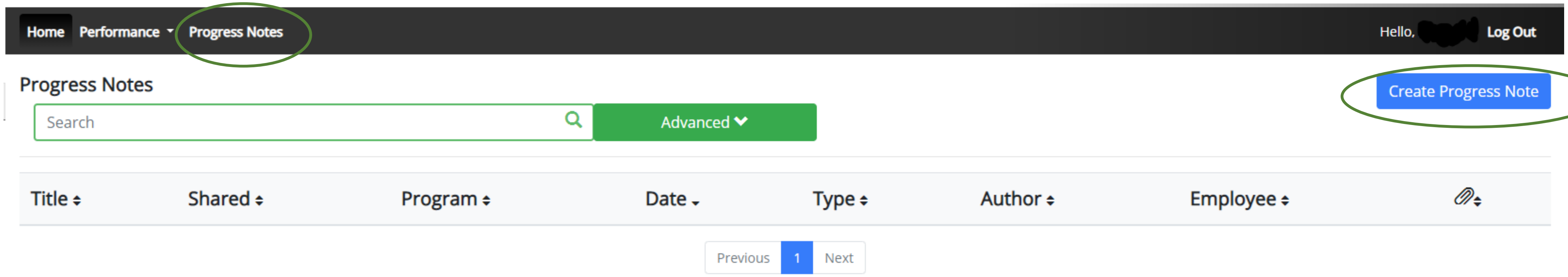
If an employee receives an overall score of 1 – 1.4 (Does not Meet Expectations), please meet with Campus HR before conducting employee meeting.

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.

UNT SYSTEM

Progress Notes



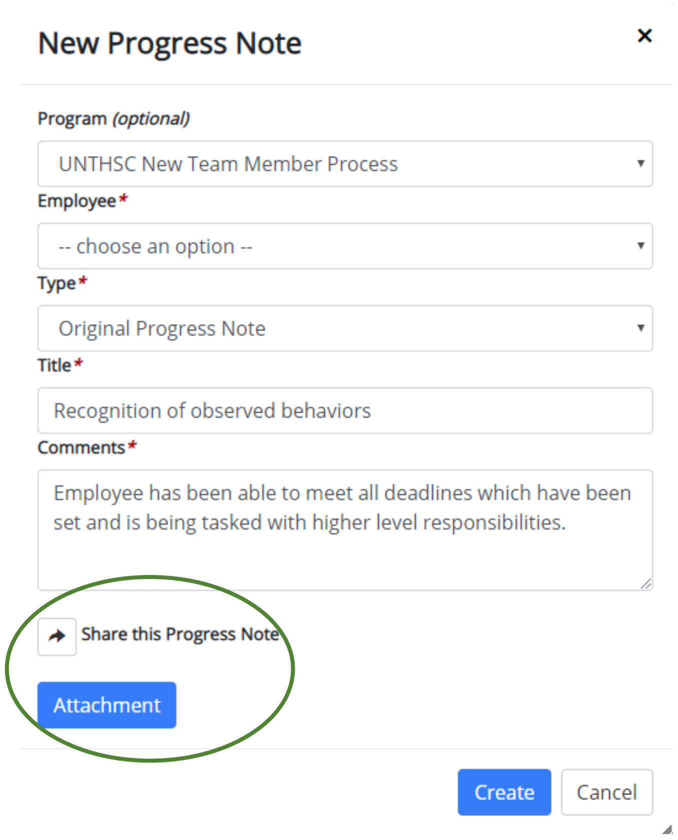
Progress notes can be added at any time during the evaluation process and allow the supervisor as well as the employee to document achievements and/or important occurrences throughout the year.

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.

UNT SYSTEM

Progress Notes (cont.)



Progress notes may either be shared between the supervisor and employee or they may be set to be only viewed by the employee or supervisor who entered them. To share a progress note, click the “Share the Progress Note” 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
Recognition of observed behaviors	*private*	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(s) created by or shared with the individual.

Title	Shared	Program	Date	Type	Author	Employee
Recognition of observed behaviors	*shared*	UNTHSC New Team Member Process	05/07/2020	Original Progress Note	you	you

Previous 1 Next

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