



# PeopleAdmin Performance Management User Guide

HSC FY 2022 Performance Evaluation Program



## Online Training Resources

Performance Management recorded training is available on [UNT World Learning](#) (UWL). Click on the Learning Library then scroll down to the Human Resources section. Search for institution specific training

- *UNT HSC - PeopleAdmin Performance Evaluation Training - Recorded Webinar*

Additional information can be found at

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



## How to Access Performance Module

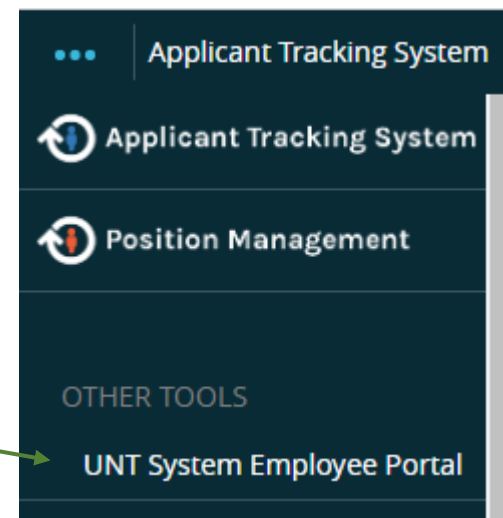
- Via employee portal link: <https://my.untsystem.edu>; go to PeopleAdmin section and select the link for Performance Management
- Or go to: <https://jobs.untsystem.edu/portal>
- Log-in with EUID and Password
- All supervisors and employees can access system



## How to Access Performance Module (cont.)

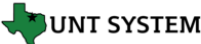


You may also access the employee portal through the PeopleAdmin System at <https://jobs.untsystem.edu/hr>. When in PeopleAdmin, simply select UNT System Employee Portal after clicking on the three dots in the top left corner.





# Navigation



[Home](#) **13** [Performance](#) [Progress Notes](#) 1

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

Hello, [Log Out](#)

Welcome to the Employee Portal,

[My Reviews](#)

[My Employees' Reviews](#)

### Your Action Items

Start typing to search

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

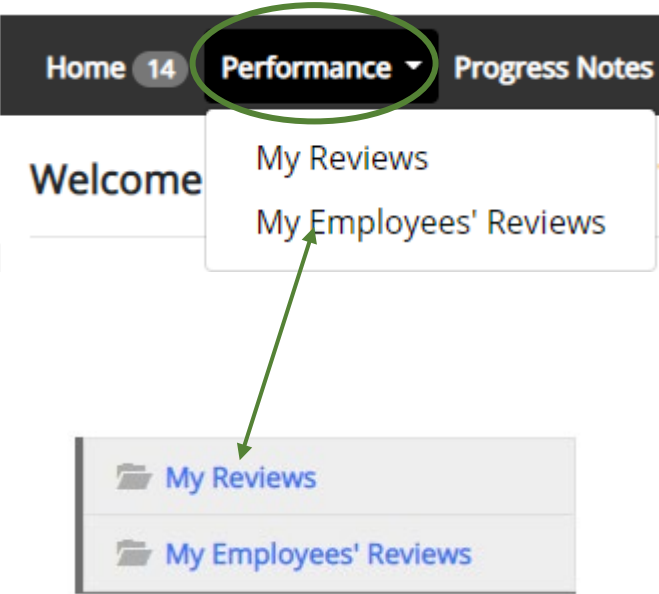
Showing 1 to 13 of 13 entries

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.

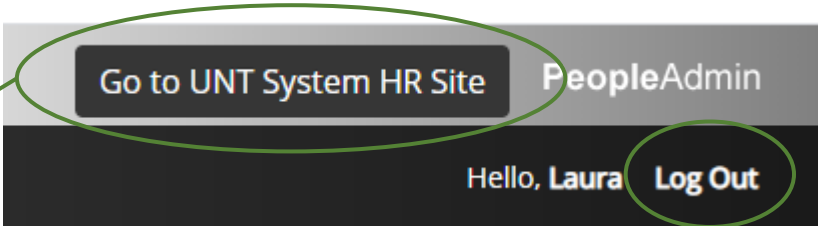


# Navigation (cont.)

The Performance button repeats the My Reviews and My Employees' Reviews links found on the left side of the screen



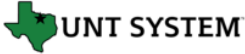
Clicking the Go to UNT System HR Site takes the user out of the employee portal and back to the Applicant Tracking System or Performance Management module.



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



# Navigation (cont.)



Patricia

Program

All Programs

Reporting org unit

All Org Units

Program Type

All Types

Open/Completed

All

My Reviews

My Employees' Reviews

Home 2 Performance Progress Notes

Go to UNT System HR Site PeopleAdmin

Hello, Patricia Log Out

My Reviews

Program	Progress	Type	Score	Review Status	Last Update	Action
<a href="#">UNTHSC New Team Member Process</a>		Annual	-	Cancelled	May 12, 2020 11:20	<a href="#">View Review</a>
<a href="#">UNTHSC Supervisor Year 1</a>		Annual	-	Cancelled	May 12, 2020 11:18	<a href="#">View Review</a>
<a href="#">UNTHSC Supervisor Year 1 (Multi-rater test)</a>		Annual	-	Open	May 12, 2020 04:22	<a href="#">View Review</a>

Showing 1 to 3 of 3 entries

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

Reviews Dashboard

Program:  Employee Name   Group by:

All Reviews 2 Not Started 0 In Process 2 Complete 0 Overdue 0 Disputed 0

Last name	First Name	Anniversary Date	Progress	Program	Score
UNTHSC Non-Manager Year 1 (Multi-rater test) 2					
	Monica	2003-09-01	0/6 <div><div>1</div><div></div><div></div><div></div><div></div><div></div></div>	UNTHSC Non-Manager Year 1 (Multi-rater test)	Unrated
	Belinda	2009-08-31	0/6 <div><div>1</div><div></div><div></div><div></div><div></div><div></div></div>	UNTHSC Non-Manager Year 1 (Multi-rater test)	Unrated

☐ Task Not Started / Unavailable

☒ Task Completed

☐ Task Open

☐ Task Disputed





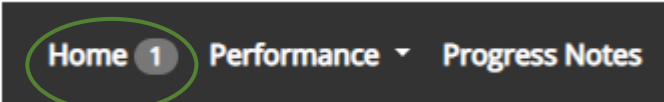
# Beginning the Review Process



My Reviews

Program	Review Status	Last Update	Action
UNT HSC FY 2021 Non-Supervisor Performance Evaluation Program	Open	January 25, 2021 04:21	<a href="#">View Review</a>

Showing 1 to 1 of 1 entries



Your Action Items

Item	Description
<a href="#">UNTHSC Non-Manager Year 1 (Multi-rater test) for Belinda</a>	Supervisor Sets Objectives & Key Results
<a href="#">UNTHSC Non-Manager Year 1 (Multi-rater test) for Monica</a>	Supervisor Sets Objectives & Key Results

Showing 1 to 2 of 2 entries

To begin the evaluation process, the employee will navigate to the available action items through the Home screen or by selecting the “My Reviews” link and clicking on the open evaluation program.



## 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. **2<sup>nd</sup> 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. These are further broken down into Individual **(10%)** and Team **(25%)** OKRs.

For additional information and training of OKRs, please visit the [Performance Evaluation Tools and Resources webpage](#).



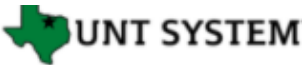
## HSC Global Objectives

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



[Home](#) **1** [Performance](#) [Progress Notes](#) **2**

Hello, Monica [Log Out](#)

Welcome to the Employee Portal, Monica

My Reviews

### Your Action Items

Start typing to search

Item	Description	Due Date	Status
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Monica</a>	Establish Objectives and Key Results	n/a	Available

Showing 1 to 1 of 1 entries

The employee will be notified via email that there is a task open for them to act 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.)



[Home](#) **1** [Performance](#) [Progress Notes](#) **2**

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 [OKR Resources](#)
- \* 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 copy your approved Individual Objectives, Key Results and Targets from your OKR worksheet into the fields below. For each objective, it is acceptable to enter multiple key results and targets into the appropriate section below the objective field.
- \* 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 - Team Objectives & Key Results Achievement:**

- \* Scroll down the page and copy your approved Team Objectives, Key Results and Targets from your OKR worksheet into the fields below. For each objective, it is acceptable to enter multiple key results and targets into the appropriate section below the objective field.
- \* Enter all team member names in the field below.
- \* Select "Add Entry" to add additional team objectives, key results and targets.
- \* Select "Save Draft" if you wish to review or edit information before finalizing.
- \* Once you have entered all team objectives, key results and targets, select "Save and Continue."

  
**Tab 3 - Global Objectives Achievement:**

- \* Scroll down the page to review the factors to be assessed for performance of Global Objectives and select "Complete"
- \* Visit the performance management web page for the system user guide and additional resources [System Human Resources Website](#).

Individual Objectives & Key Results Achievement

[Team Objectives & Key Results Achievement](#)

[Global Objectives Achievement](#)

**HSC FY 2022 Performance Evaluation Program (Test)**  
Review Status: [Open](#)  
Evaluation Type: Annual  
Program Timeframe: 09/01/21 to -  
Last Updated: November 22, 2021 07:38

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.)

Individual Objectives & Key Results Achievement | Team Objectives & Key Results Achievement | Global Objectives Achievement

This tab contains the factors utilized to evaluate overall performance on established Individual Objectives and Key Results (OKRs). 10% of the overall evaluation score will be based on employee performance of individual OKRs. [Check spelling](#)

Required fields are indicated with an asterisk (\*).

### Individual Objectives & Key Results Achievement

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

\* My 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

☐ Remove Entry?

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

**Tab 1:** After attaching the OKR worksheet in Progress Notes (see Appendix), copy the **Individual** objectives and key results into the appropriate section 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.

**\*\*Individual OKRs account for 10% of the overall score\*\***

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.)

Individual Objectives & Key Results Achievement | Team Objectives & Key Results Achievement | Global Objectives Achievement

This tab contains the factors utilized to evaluate overall performance on established Team Objectives and Key Results (OKRs). 25% of the overall evaluation score will be based on employee performance of team OKRs. [Check spelling](#)

Required fields are indicated with an asterisk (\*).

Team Objectives & Key Results Achievement

\* Team Objective: What will the team do to support the Business Unit? - Begin statement with a verb

\* Key Result: How will the team know if the objective has been met? - Measures achievement and most likely includes a number i.e. date, percentage, total, etc.

\* December Targets - What will the team do in this period toward reaching the key result?

\* April Targets - What will the team do in this period toward reaching the key result?

\* July Targets - What will the team do in this period toward reaching the key result?

\* Team Member List

Please list any team members relating to this OKR

☐ Remove Entry?

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

**Tab 2:** Once the individual OKRs have been entered, copy the **Team** objectives and key results into the appropriate section for assessment as well as the specific targets to be achieved. All team members associated with the specific OKR will also need to be listed within this section.

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.

**\*\*Team OKRs account for 25% of the overall score\*\***

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.)

Individual Objectives & Key Results Achievement    Team Objectives & Key Results Achievement    Global Objectives Achievement

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. [Check spelling](#)

## Global Objectives Achievement

Global Objective

Solved Department Problems

Example behaviors at Meets Expectations

Non-Supervisors:

- \* 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.

Supervisors:

- \* Effectively breaks down problems into its fundamental components.
- \* Identifies root causes of problems and solutions to them that improve their department.
- \* Whenever possible, uses evidence to make informed decisions.
- \* Recognizes typical as well as complex and emerging problems, and creates new processes to achieve key results.
- \* Demonstrates follow-through on executing plans and implementing improvements.
- \* Creates new ideas and processes despite initial ambiguity of the situation.
- \* Assists direct reports in diagnosing problems, and recognizes them for making improvements in the unit.

**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.

**\*\*There are 7 global objectives, each one lists the expected behaviors for achievement for both supervisors as well as non-supervisors.\*\***

[Save Draft](#) [Complete](#)



## 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.



Home 2 Performance ▾ Progress Notes 7

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

### Your Action Items

Item	Description	Due Date	Status
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Monica</a>	Supervisor Approves Objectives & Key Results	n/a	Available
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Patricia</a>	Establish Objectives and Key Results	n/a	Available

Showing 1 to 2 of 2 entries

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.)



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 2 Performance Progress Notes 7

Hello, Patricia Log Out

Plan for Monica

Actions

Instructions:

- Scroll down the page to review the established Individual and Team 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.

Individual Objectives & Key Results Achievement

This tab contains the factors utilized to evaluate overall performance on established Individual Objectives and Key Results (OKRs). 10% of the overall evaluation score will be based on employee performance of individual OKRs.

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

Objective

My 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.

Key Result

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

Targets

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

Targets

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

Targets

HSC FY 2022 Performance Evaluation Program (Test)

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 09/01/21 to -

Last Updated: November 22, 2021 08:49

Last Completed Step: Establish Objectives and Key Results

Co-reviewer: Add Co-reviewer

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



# Supervisor Approves Objectives & Key Results (Cont.)

## Team Objectives & Key Results Achievement

This tab contains the factors utilized to evaluate overall performance on established Team Objectives and Key Results (OKRs). 25% of the overall evaluation score will be based on employee performance of team OKRs.

**Team Objective:** What will the team do to support the Business Unit? - Begin statement with a verb

Objective

**Key Result:** How will the team know if the objective has been met? - Measures achievement and most likely includes a number i.e. date, percentage, total, etc.

Key Result

**December Targets** - What will the team do in this period toward reaching the key result?

Targets

**April Targets** - What will the team do in this period toward reaching the key result?

Targets

**July Targets** - What will the team do in this period toward reaching the key result?

Targets

**Team Member List**

Team

The supervisor will then review the Team Objectives, Key Results and Targets which were entered in the corresponding tab. Once satisfied that the entries made are the agreed upon OKRs, the supervisor will scroll down to view the other assessment factors.



# Supervisor Approves Objectives & Key Results (Cont.)

## Global Objectives Achievement

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

Non-Supervisors:

- \* 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.

Supervisors:

- \* Effectively breaks down problems into its fundamental components.
- \* Identifies root causes of problems and solutions to them that improve their department.
- \* Whenever possible, uses evidence to make informed decisions.
- \* Recognizes typical as well as complex and emerging problems, and creates new processes to achieve key results.
- \* Demonstrates follow-through on executing plans and implementing improvements.
- \* Creates new ideas and processes despite initial ambiguity of the situation.
- \* Assists direct reports in diagnosing problems, and recognizes them for making improvements in the unit.

Global Objective

Demonstrated Functional Knowledge and Skills

Example behaviors at Meets Expectations

Non-Supervisors:

- \* 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.

Supervisors:

- \* Demonstrates expertise in knowledge and skills within the different areas of their department.
- \* Develops best practices in the disciplines and specialty areas of their department.
- \* Serves as a resource for their direct reports on major developments in the disciplines and specialty areas in their department.
- \* Perceived by customers and direct reports in their department as possessing high functional knowledge and skills.

Comment

Return for Revision

Approve

The supervisor will be able to review all factors used to assess as the global objectives. Note – these are not editable by the supervisor nor 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.” If the form is approved, select “Approve” to complete the task.



# Multi-Rater Feedback

A supervisor can request performance feedback from other UNT World employees

Overview

Plan

Supervisor Evaluation

Multi-rater Feedback ▾

+ Invite Multi-rater

History

My Reviews



My Employees' Reviews

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.

## Select Multi Raters

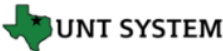
Begin typing a name or login to search available users. Then select users from the list.

Kareem		Crosdale		Username
	Name	Login	Department	Supervisor
	Kareem Crosdale		SYS	Melinda Lilly

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.)



Home 1 Performance ▾ Progress Notes 1

Hello, Kareem

Welcome to the Employee Portal, Kareem

My Reviews

My Multi Rater Feedback

Your Action Items

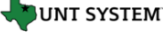
Item	Description	Due Date	Status
<a href="#">UNTHSC Supervisor Year 1 (Multi-rater test) for Rebel</a>	Multi-Rater Feedback	n/a	Available

Showing 1 to 1 of 1 entries

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.)



Home 1 Performance Progress Notes 1

Hello, Kareem Log Out

Supervisor:  
Position Description:  
  
Department: UNT Health Science Center

Peer Review  
My Reviews  
My Multi Rater Feedback

Multi Rater Feedback for

Actions

Instructions:  
- Enter Comments relating to the evaluated employee's performance. Information is provided below to guide the type of feedback requested. All comments can be included in the provided comments box. It is not necessary to add additional entries.  
- Please do not select the Remove Entry checkbox. If you have no comments, please enter "No comments on performance."  
- Select Save Draft if you wish to review or edit information before finalizing.  
- Select Complete when all actions have been completed.

Additional Reviewer

Attachments 0

Required fields are indicated with an asterisk (\*).

Check spelling

Additional Reviewer  
Please provide feedback regarding the evaluated employee's performance during the preceding year relating to one or more of the following categories: produced results, customer service, business knowledge, leadership, teamwork, stakeholder relationships, change management, accountability, and/or vision.  
\* Comments  

☐ Remove Entry?

Add Entry

Save Draft Complete

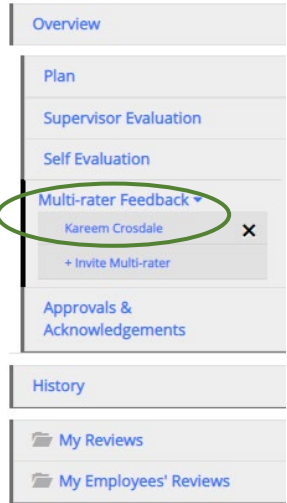
UNTHSC Supervisor Year 1 (Multi-rater test)  
Review Status: Open  
Evaluation Type: Annual  
Program Timeframe: 01/01/20 to -  
Last Updated: May 14, 2020 17:41  
Last Completed Step: Supervisor Evaluation

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.

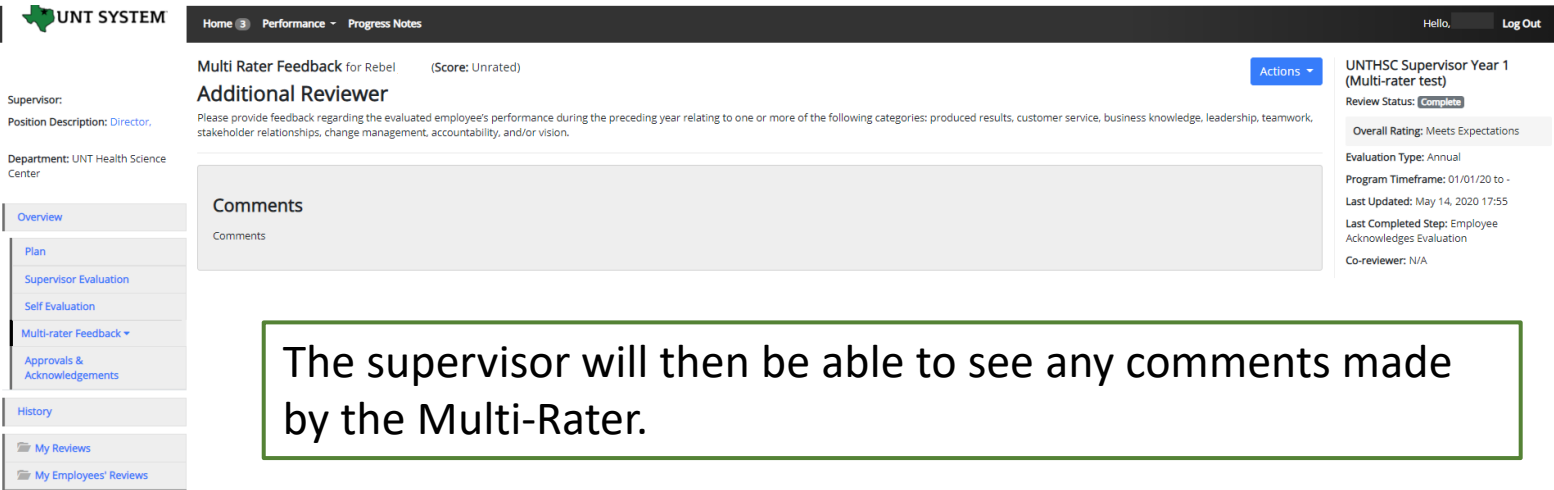




# Multi-Rater – Supervisor’s View



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 is to have **full** feedback capabilities to the employee’s evaluation. The co-reviewer has the ability to perform all the same steps as the supervisor.

UNTHSC Non-Manager Year 1  
(Multi-rater test)

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 01/01/20 to -

Last Updated: May 14, 2020 11:47

Last Completed Step: Self Evaluation

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

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.

Select Co-reviewer

Begin typing a name or login to search available users. Then select a user from the list.

Kareem

Crosdale

Username

<input checked="" type="checkbox"/>	Name	Login	Department	Supervisor
<input type="radio"/>	Kareem Crosdale		SYS	Melinda Lilly

Cancel

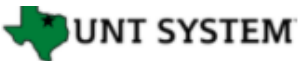
Save

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 then notify the co-reviewer 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.



# 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.



Home 2

Performance ▾

Progress Notes 7

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

My Reviews

My Employees' Reviews

### Your Action Items

Start typing to search

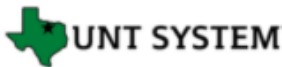
Item	Description	Due Date	Status
HSC FY 2022 Performance Evaluation Program (Test) for Monica	December Performance Check-In	2021-12-23 Due in about 1 month	Upcoming
HSC FY 2022 Performance Evaluation Program (Test) for Patricia	Establish Objectives and Key Results	n/a	Available

Showing 1 to 2 of 2 entries

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



# December Performance Check-In (Cont.)



Home 2 Performance ▾ Progress Notes 7

Hello, Patricia Log Out

Monica

Supervisor: Patricia

Position Description: [Operations Analyst](#)

Department: UNT Health Science Center

Overview

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Multi-rater Feedback ▾

Approvals & Acknowledgements

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## 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 your HR Compensation and Performance Management representative for assistance.
- \* Once the meeting with the employee is complete, select "Complete."

Complete

HSC FY 2022  
Performance  
Evaluation Program  
(Test)

Review Status: Open

Evaluation Type: Annual

Program Timeframe:  
09/01/21 to -

Last Updated: November 22,  
2021 09:20

Last Completed Step:  
Supervisor Approves  
Objectives & Key Results

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

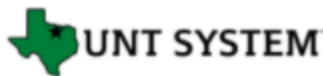
Progress notes (see Appendix) should be entered to document if the employee met the targets assigned to this time period. Once the supervisor has met with the employee and given them an update on their progress, they will select the "Complete" button to indicate that the meeting has taken place.

If OKRs need updating, the supervisor should reach out to the Compensation and Performance Management team ([kareem.crosdale@untsystem.edu](mailto:kareem.crosdale@untsystem.edu) or [jennifer.bustillos@untsystem.edu](mailto:jennifer.bustillos@untsystem.edu)) for assistance.



# 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



Home 2 Performance ▾ Progress Notes 7

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

## Your Action Items

Start typing to search

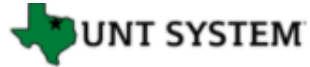
Item	Description	Due Date	Status
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Monica</a>	April Performance Check-In	2022-04-30 Due in 5 months	Upcoming
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Patricia</a>	Establish Objectives and Key Results	n/a	Available

Showing 1 to 2 of 2 entries

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



## April Performance Check-In (Cont.)



Home 2 Performance ▾ Progress Notes 7

Hello, Patricia Log Out

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

Overview

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Supervisor Evaluation

Self Evaluation

Multi-rater Feedback ▾

Approvals &  
Acknowledgements

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### April 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 your HR Compensation and Performance Management representative for assistance.
- \* Once the meeting with the employee is complete, select "Complete."

Complete

HSC FY 2022  
Performance  
Evaluation Program  
(Test)

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe:  
09/01/21 to -

Last Updated: November 22,  
2021 09:33

Last Completed Step:  
December Performance  
Check-In

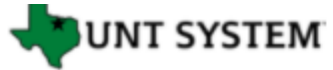
Co-reviewer: [Add Co-reviewer](#)

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 ([kareem.crosdale@untsystem.edu](mailto:kareem.crosdale@untsystem.edu) or [jennifer.bustillos@untsystem.edu](mailto:jennifer.bustillos@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



Home 2 Performance ▾ Progress Notes 7

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

### Your Action Items

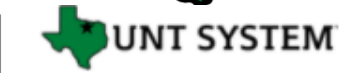
Item	Description	Due Date	Status
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Monica</a>	July Performance Check-In	2022-07-15 Due in 8 months	Upcoming
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Patricia</a>	Establish Objectives and Key Results	n/a	Available

Showing 1 to 2 of 2 entries

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



## July Performance Check-In (Cont.)



Home 2 Performance ▾ Progress Notes 7

Hello, Patricia Log Out

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

Overview

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Self Evaluation

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Acknowledgements

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### July 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 your HR Compensation and Performance Management representative for assistance.
- \* Once the meeting with the employee is complete, select "Complete."

Complete

HSC FY 2022  
Performance  
Evaluation Program  
(Test)

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe:  
09/01/21 to -

Last Updated: November 22,  
2021 09:46

Last Completed Step: April  
Performance Check-In

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

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.

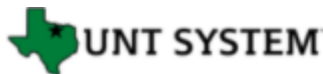
If OKRs need updating, the supervisor should reach out to the Compensation and Performance Management team ([kareem.crosdale@untsystem.edu](mailto:kareem.crosdale@untsystem.edu) or [jennifer.bustillos@untsystem.edu](mailto:jennifer.bustillos@untsystem.edu)) for assistance.





# Complete Self-Evaluation

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



Home 1 Performance ▾ Progress Notes 2

Hello, Monica Log Out

Welcome to the Employee Portal, Monica

My Reviews

## Your Action Items

Start typing to search

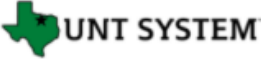
Item	Description	Due Date	Status
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Monica</a>	Self-Evaluation	2022-07-31 Due in 8 months	Upcoming

Showing 1 to 1 of 1 entries

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



## Complete Self-Evaluation (Cont.)



Home 1 Performance ▾ Progress Notes 2

Hello, Monica Log Out

Monica

Supervisor: Patricia

Position Description: [Operations](#)

Department: UNT Health Science Center

Overview

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Self Evaluation

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Self Evaluation for Monica

Actions ▾

Instructions:

Tab 1 - Individual Objectives and Key Results Assessment:

- \* Scroll down the page and make the necessary selection from the drop down menu indicating if key results were met.
- \* Scroll down further on the page and select a rating for the overall performance of individual 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 the information before finalizing.
- \* Select "Save and Continue" when you are ready to move to the next step.

Tab 2 - Team Objectives and Key Results Assessment:

- \* Scroll down the page and make the necessary selection from the drop down menu indicating if key results were met.
- \* Scroll down further on the page and select a rating for the overall performance of team objectives and key results and provide appropriate feedback regarding your performance in this area.
- \* Select "Save and Continue" when you are ready to move to the next step.
- \* If you would like to add supporting documentation, please select the "Attachments" link.
- \* Select "Save Draft" if you wish to review or edit the 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.

Individual Objectives & Key Results Assessment

Team Objectives & Key Results Assessment

Global Objectives Assessment

Attachments 0

HSC FY 2022 Performance Evaluation Program (Test)

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 09/01/21 to -

Last Updated: November 22, 2021 09:57

Last Completed Step: July Performance Check-In

The employee will review the tab instructions and then scroll down the page to begin their self evaluation. As they progress through the different tabs, they are able to reference the instructions at the top of the page.



# Complete Self-Evaluation (Cont.)

Individual Objectives & Key Results Assessment

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

Objective

My 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.:

Key Result

December Targets :

Targets

April Targets:

Targets

July Targets:

Targets

\* Key Results Met?

Evaluative Feedback of Individual Objectives & Key Results

Summarize significant contributions toward individual objectives and key results in the past year and provide feedback on opportunities for growth.

Example behaviors at Meets Expectations for Non-Supervisors

- \* 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.

Example behaviors at Meets Expectations for Supervisors

- \* Regularly achieves majority of goals and tasks.
- \* Maintains focus, perseveres under stress, and is not distracted by unexpected events.
- \* Prioritizes tasks based on importance, but also able to modify plans when necessary.
- \* Delegates tasks in an appropriate manner.
- \* Is receptive to feedback and implements it to improve efficiency and effectiveness.
- \* Holds direct reports accountable for producing key results in a timely manner and provides performance feedback that is accurate and authentic.
- \* Helps direct reports overcome obstacles to achieve success.

\* Rating - Select one from drop-down menu

Please select

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

**Tab 1 (individual OKRs):** After scrolling down the page, the employee will indicate if they have met their key results for each Individual objective using the drop-down menu, they will then scroll down to view the factors used to assess their achievement of their Individual OKRs. The employee will select a rating from the drop-down menu reflecting their overall performance of their OKRs and provide relevant feedback.

Select “Save Draft” if edits are required before finalizing or select “Save and Continue” to move to the next tab.

**\*\*Individual OKRs make up 10% of the overall evaluation score.\*\***



# Complete Self-Evaluation (Cont.)

Team Objectives & Key Results Assessment

Team Objective: What will the team do to support the Business Unit?:

Objective

Key Result: How will the team know if the objective has been met? - Measures achievement and most likely includes a number i.e. date, percentage, total, etc.:

Key Result

December Targets - What will the team do in this period toward reaching the key result?:

Targets

April Targets - What will the team do in this period toward reaching the key result?:

Targets

July Targets - What will the team do in this period toward reaching the key result?:

Targets

Team Member List:

Team

\* Key Results Met?

Evaluative Feedback of Team Objectives & Key Results

Summarize significant contributions toward team objectives and key results in the past year and provide feedback on opportunities for growth.

Example behaviors at Meets Expectations for Non-Supervisors

- \* 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.

Example behaviors at Meets Expectations for Supervisors

- \* Regularly achieves majority of goals and tasks.
- \* Maintains focus, perseveres under stress, and is not distracted by unexpected events.
- \* Prioritizes tasks based on importance, but also able to modify plans when necessary.
- \* Delegates tasks in an appropriate manner.
- \* Is receptive to feedback and implements it to improve efficiency and effectiveness.
- \* Holds direct reports accountable for producing key results in a timely manner and provides performance feedback that is accurate and authentic.
- \* Helps direct reports overcome obstacles to achieve success.

\* Rating - Select one from drop-down menu

Please select

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

☐ Remove Entry?

**Tab 2 (Team OKRs):** Like the first tab, the employee will scroll down the page to indicate if they have met their key results for each Team objective using the drop-down menu, they will then scroll down to view the factors used to assess their achievement of their Team OKRs. The employee will select a rating from the drop-down menu reflecting their overall performance of their OKRs and provide relevant feedback.

Select “Save Draft” if edits are required before finalizing or select “Save and Continue” to move to the next tab.

**\*\*Team OKRs make up 25% of the overall evaluation score.\*\***



## Complete Self-Evaluation (Cont.)

Individual Objectives & Key Results Assessment | Team Objectives & Key Results Assessment | Global Objectives Assessment | Attachments

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.

Required fields are indicated with an asterisk (\*)

**Solved Department Problems**

Example behaviors at Meets Expectations

**Non-Supervisors:**

- 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.

**Supervisors:**

- Effectively breaks down problems into its fundamental components.
- Identifies root causes of problems and solutions to them that improve their department.
- Whenever possible, uses evidence to make informed decisions.
- Recognizes typical as well as complex and emerging problems, and creates new processes to achieve key results.
- Demonstrates follow-through on executing plans and implementing improvements.
- Creates new ideas and processes despite initial ambiguity of the situation.
- Assesses direct reports in diagnosing problems, and recognizes them for making improvements in the unit.

\* Rating - Select one from drop-down menu  
Please select

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

☐ Remove Entry?

**Shown Initiative**

Example behaviors at Meets Expectations

**Non-Supervisors:**

- 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.

**Supervisors:**

- Actively seeks out ways on own to improve outcomes, processes, and measurements.
- Takes responsibility and provides leadership on projects and initiatives.
- Takes action on projects without being directed to do so, and looks for opportunities to move projects along.
- Enthusiastically seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages staff to identify and address process improvements, and to participate in projects and on committees when appropriate.

\* Rating - Select one from drop-down menu  
Please select

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

**Tab 3 (Global Objectives):** 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. Select “Save Draft” to review or edit the 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 found at the top of the page.

**\*\* There are 7 Global Objectives, and they make up 65% of the overall evaluation score\*\***



# Complete Supervisor Evaluation

UNT SYSTEM

My Reviews

My Employees' Reviews

Home 2 Performance ▾ Progress Notes 7

Hello, Patricia Log Out

Welcome to the Employee Portal, Patricia

Your Action Items

Item	Description	Due Date	Status
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Monica</a>	Supervisor Evaluation	2022-08-12 Due in 9 months	Upcoming
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Patricia</a>	Establish Objectives and Key Results	n/a	Available

Showing 1 to 2 of 2 entries

Once the self evaluation is complete, the supervisor will be notified via email. 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.)

The supervisor will review the tab instructions and then scroll down the page to begin the employee's evaluation. From the left menu, they will be able to access the self-evaluation as well as any multi-rater feedback (this can also be done by selecting the overview link). As they progress through the different tabs, they can reference the instructions at the top of the page.





# Supervisor Evaluation (cont.)

Individual Objectives & Key Results Assessment

Team Objectives & Key Results Assessment

Global Objectives Assessment

Attachments

This tab contains the factors utilized to evaluate overall performance on established Individual Objectives and Key Results (OKRs). 10% of the overall evaluation score will be based on employee performance of individual OKRs.

Required fields are indicated with an asterisk (\*).

Individual Objectives & Key Results Assessment

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

Objective

My 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.:

Key Result

December Targets :

Targets

April Targets:

Targets

July Targets:

Targets

\* Key Results Met?

Evaluative Feedback of Individual Objectives & Key Results

Summarize significant contributions toward individual objectives and key results in the past year and provide feedback on opportunities for growth.

Example behaviors at Meets Expectations for Non-Supervisors

- 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.

Example behaviors at Meets Expectations for Supervisors

- Regularly achieves majority of goals and tasks.
- Maintains focus, perseveres under stress, and is not distracted by unexpected events.
- Prioritizes tasks based on importance, but also able to modify plans when necessary.
- Delegates tasks in an appropriate manner.
- Is receptive to feedback and implements it to improve efficiency and effectiveness.
- Holds direct reports accountable for producing key results in a timely manner and provides performance feedback that is accurate and authentic.
- Helps direct reports overcome obstacles to achieve success.

\* Rating - Select one from drop-down menu

Please select

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

Remove Entry?

Save Draft

Save & Continue

**Tab 1 (Individual OKRs Assessment):** the supervisor will scroll down the page to indicate if the employee has met their key results using the drop-down menu, scroll down to view the factors used to assess the employee’s achievement of their Individual OKRs. The supervisor will select a rating from the drop-down menu reflecting the employee’s overall performance of their OKRs and provide relevant feedback.

Select “Save Draft” if edits are required before finalizing or select “Save and Continue” to move to the next tab.

**\*\*Individual OKRs make up 10% of the overall evaluation score.\*\***





# Supervisor Evaluation (cont.)

Individual Objectives & Key Results Assessment

Team Objectives & Key Results Assessment

Global Objectives Assessment

Attachments

This tab contains the factors utilized to evaluate overall performance on established Team Objectives and Key Results (OKRs). 25% of the overall evaluation score will be based on employee performance of team OKRs.

Check spelling

Required fields are indicated with an asterisk (\*).

Team Objectives & Key Results Assessment

Team Objective: What will the team do to support the Business Unit?:

Objective

Key Result: How will the team know if the objective has been met? - Measures achievement and most likely includes a number i.e. date, percentage, total, etc.:

Key Result

December Targets - What will the team do in this period toward reaching the key result?:

Targets

April Targets - What will the team do in this period toward reaching the key result?:

Targets

July Targets - What will the team do in this period toward reaching the key result?:

Targets

Team Member List:

Team

\* Key Results Met?

Evaluative Feedback of Team Objectives & Key Results

Summarize significant contributions toward team objectives and key results in the past year and provide feedback on opportunities for growth.

Example behaviors at Meets Expectations for Non-Supervisors

- 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.

Example behaviors at Meets Expectations for Supervisors

- Regularly achieves majority of goals and tasks.
- Maintains focus, perseveres under stress, and is not distracted by unexpected events.
- Prioritizes tasks based on importance, but also able to modify plans when necessary.
- Delegates tasks in an appropriate manner.
- Is receptive to feedback and implements it to improve efficiency and effectiveness.
- Holds direct reports accountable for producing key results in a timely manner and provides performance feedback that is accurate and authentic.
- Helps direct reports overcome obstacles to achieve success.

\* Rating - Select one from drop-down menu

Please select

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

Remove Entry?

Save Draft

Save & Continue

**Tab 2 (Team OKRs Assessment):** the supervisor will scroll down the page to indicate if the employee has met their key results using the drop-down menu, scroll down to view the factors used to assess the employee’s achievement of their Team OKRs. The supervisor will select a rating from the drop-down menu reflecting the employee’s overall performance of their OKRs and provide relevant feedback.

Select “Save Draft” if edits are required before finalizing or select “Save and Continue” to move to the next tab.

**\*\*Individual OKRs make up 25% of the overall evaluation score.\*\***

HSC

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# Supervisor Evaluation (Cont.)

Individual Objectives & Key Results Assessment

Team Objectives & Key Results Assessment

Global Objectives Assessment

Attachments

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.

Required fields are indicated with an asterisk (\*)

**Solved Department Problems**

Example behaviors at Meets Expectations

**Non-Supervisors:**

- 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.

**Supervisors:**

- Effectively breaks down problems into its fundamental components.
- Identifies root causes of problems and solutions to them that improve their department.
- Whenever possible, uses evidence to make informed decisions.
- Recognizes typical as well as complex and emerging problems, and creates new processes to achieve key results.
- Demonstrates follow-through on executing plans and implementing improvements.
- Creates new ideas and processes despite initial ambiguity of the situation.
- Assesses direct reports in diagnosing problems, and recognizes them for making improvements in the unit.

\* Rating - Select one from drop-down menu

Please select

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

☐ Remove Entry?

**Shown Initiative**

Example behaviors at Meets Expectations

**Non-Supervisors:**

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

**Supervisors:**

- Actively seeks out ways on own to improve outcomes, processes, and measurements.
- Takes responsibility and provides leadership on projects and initiatives.
- Takes action on projects without being directed to do so, and looks for opportunities to move projects along.
- Enthusiastically seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages staff to identify and address process improvements, and to participate in projects and on committees when appropriate.

\* Rating - Select one from drop-down menu

Please select

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

Save Draft


Complete

**Tab 3 (Global Objectives):** On the third tab the supervisor will scroll down the page, selecting a rating for each global objective and provide appropriate feedback regarding the employee’s performance in each area. Supervisor’s may also add supporting documentation by selecting the “Attachments” link. Select “Save Draft” to review or edit the 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 found at the top of the page.

**\*\* There are 7 Global Objectives, and they make up 65% of the overall evaluation score\*\***



# Second Level Supervisor Approves Evaluation (cont.)

 UNT SYSTEM

Home ② Performance ▾ Progress Notes

Hello, Stephen Log Out

Welcome to the Employee Portal, Stephen

My Reviews

My Employees' Reviews

### Your Action Items

Start typing to search

Item	Description	Due Date	Status
HSC FY 2022 Performance Evaluation Program (Test) for Monica	Second Level Supervisor Approves Evaluation	2022-08-19 Due in 9 months	Upcoming
HSC FY 2022 Performance Evaluation Program (Test) for Stephen	Establish Objectives and Key Results	n/a	Available

Showing 1 to 2 of 2 entries

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.



# Second Level Supervisor Approves Evaluation (cont.)

UNT SYSTEM

Monica

Supervisor: Patricia

Position Description: Operations

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

Approvals & Acknowledgements

History

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Help, Stephen Log Out

Supervisor Evaluation for Monica

Actions

Second Level Approval Instructions:

- Review supervisor ratings and feedback.
- For approval, select "Acknowledge" to indicate that you support the content of the evaluation.
- If revision is needed, enter comments and select "Return to Supervisor".

Individual Objectives & Key Results Assessment

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

Objective

My 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.:

Key Result

December Targets :

Targets

April Targets:

Targets

July Targets:

Targets

Key Results Met?

Yes

Evaluative Feedback of Individual Objectives & Key Results

Summarize significant contributions toward individual objectives and key results in the past year and provide feedback on opportunities for growth.

Example behaviors at Meets Expectations for Non-Supervisors

- 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.

Example behaviors at Meets Expectations for Supervisors

- Regularly achieves majority of goals and tasks.
- Maintains focus, perseveres under stress, and is not distracted by unexpected events.
- Prioritizes tasks based on importance, but also able to modify plans when necessary.
- Delegates tasks in an appropriate manner.
- Is receptive to feedback and implements it to improve efficiency and effectiveness.
- Holds direct reports accountable for producing key results in a timely manner and provides performance feedback that is accurate and authentic.
- Helps direct reports overcome obstacles to achieve success.

Rating - Select one from drop-down menu

Exceeds Expectations

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

Feedback

HSC FY 2022 Performance Evaluation Program (Test)

Review Status: Done

Overall Rating: Meets Expectations

Evaluation Type

Program Timeframe: 09/01/21 to

Last Updated: November 24, 2021 07:47

Last Completed Step: Supervisor Evaluation

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.



## Second Level Supervisor Approves Evaluation (cont.)

### Team Objectives & Key Results Assessment

This tab contains the factors utilized to evaluate overall performance on established Team Objectives and Key Results (OKRs). 25% of the overall evaluation score will be based on employee performance of team OKRs.

Team Objective: What will the team do to support the Business Unit?:

Objective

Key Result: How will the team know if the objective has been met? - Measures achievement and most likely includes a number i.e. date, percentage, total, etc.:

Key Result

December Targets - What will the team do in this period toward reaching the key result?:

Targets

April Targets - What will the team do in this period toward reaching the key result?:

Targets

July Targets - What will the team do in this period toward reaching the key result?:

Targets

Team Member List:

Team

Key Results Met?

Yes

### Evaluative Feedback of Team Objectives & Key Results

Summarize significant contributions toward team objectives and key results in the past year and provide feedback on opportunities for growth.

#### Example behaviors at Meets Expectations for Non-Supervisors

- 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.

#### Example behaviors at Meets Expectations for Supervisors

- Regularly achieves majority of goals and tasks.
- Maintains focus, perseveres under stress, and is not distracted by unexpected events.
- Prioritizes tasks based on importance, but also able to modify plans when necessary.
- Delegates tasks to an appropriate manner.
- Is receptive to feedback and implements it to improve efficiency and effectiveness.
- Makes direct reports accountable for producing key results in a timely manner and provides performance feedback that is accurate and authentic.
- Helps direct reports overcome obstacles to achieve success.

Rating - Select one from drop-down menu

Exceeds Expectations

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

Feedback

### Solved Department Problems

#### Example behaviors at Meets Expectations

##### Non-Supervisors:

- 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.

##### Supervisors:

- Effectively breaks down problems into its fundamental components.
- Identifies root causes of problems and solutions to them that improve their department.
- Whenever possible, uses evidence to make informed decisions.
- Recognizes typical as well as complex and emerging problems, and creates new processes to achieve key results.
- Demonstrates follow through on executing plans and implementing improvements.
- Creates new ideas and processes despite initial ambiguity of the situation.
- Assists direct reports in diagnosing problems, and recognizes them for making improvements in the unit.

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)

Feedback

### Showed Initiative

#### Example behaviors at Meets Expectations

##### Non-Supervisors:

- 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.

##### Supervisors:

- Actively seeks out ways on own to improve outcomes, processes, and measurements.
- Takes responsibility and provides leadership on projects and initiatives.
- Takes action on projects without being directed to do so, and looks for opportunities to move projects along.
- Enthusiastically seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages staff to identify and address process improvements, and to participate in projects and on committees when appropriate.

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)

Feedback

Comment

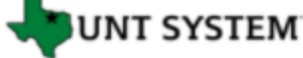
Return to Supervisor

Acknowledge

After reviewing all then entries which have been made, and if the second level supervisor agrees 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



Home 2 Performance ▾ Progress Notes 7

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
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Monica</a>	End of Year Review Meeting	2022-08-26 Due in 9 months	Upcoming
<a href="#">HSC FY 2022 Performance Evaluation Program (Test) for Patricia</a>	Establish Objectives and Key Results	n/a	Available

Showing 1 to 2 of 2 entries

Once the second level approval has been completed, 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.)



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

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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

HSC FY 2022 Performance Evaluation Program (Test)

Review Status: Open

Overall Rating: Meets Expectations

Evaluation Type: Annual

Program Timeframe: 09/01/21 to -

Last Updated: November 24, 2021 08:59

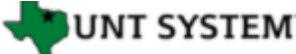
Last Completed Step: Second Level Supervisor Approves Evaluation

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.



# Employee Acknowledges Evaluation



Home 1 Performance ▾ Progress Notes 2

Hello, Monica Log Out

Welcome to the Employee Portal, Monica

My Reviews

### Your Action Items

Start typing to search

Item	Description	Due Date	Status
HSC FY 2022 Performance Evaluation Program (Test) for Monica	Employee Acknowledges Evaluation	2022-08-26 Due in 9 months	Upcoming

Showing 1 to 1 of 1 entries

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.)

UNT SYSTEM

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 2

Hello, Monica Log Out

Supervisor Evaluation for Monica

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.

Overall Rating

Individual Objectives & Key Results Assessment

This tab contains the factors utilized to evaluate overall performance on established Individual Objectives and Key Results (OKRs). 10% of the overall evaluation score will be based on employee performance of individual OKRs.

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

Objective

My 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.:

Key Result

December Targets :

Targets

April Targets:

Targets

July Targets:

Targets

Key Results Met?

Yes

Actions

HSC FY 2022 Performance Evaluation Program (Test)

Review Status: Open

Overall Rating: Meets Expectations

Evaluation Type: Annual

Program Timeframe: 09/01/21 to -

Last Updated: November 24, 2021 09:05

Last Completed Step: End of Year Review Meeting

## Showed Initiative

Example behaviors at Meets Expectations

- Non-Supervisors:**
- \* 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.
- Supervisors:**
- \* Actively seeks out ways on own to improve outcomes, processes, and measurements.
  - \* Takes responsibility and provides leadership on projects and initiatives.
  - \* Takes action on projects without being directed to do so, and looks for opportunities to move projects along.
  - \* Enthusiastically seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
  - \* Encourages staff to identify and address process improvements, and to participate in projects and on committees when appropriate.

### 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)

Feedback

Comment

Check spelling

Acknowledge

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



## Completed Evaluation

**UNT SYSTEM**

**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.

**UNT SYSTEM**

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.			



## 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.



# Progress Notes

Home Performance **Progress Notes**

Hello, Log Out

Progress Notes

Advanced ▼

Create Progress Note

Title ▼	Shared ▼	Program ▼	Date ▼	Type ▼	Author ▼	Employee ▼	
---------	----------	-----------	--------	--------	----------	------------	--

Previous

1

Next

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.



## Progress Notes (cont.)

New Progress Note

Program (optional)

UNTHSC New Team Member Process

Employee\*

-- choose an option --

Type\*

Original Progress Note

Title\*

Recognition of observed behaviors

Comments\*

Employee has been able to meet all deadlines which have been set and is being tasked with higher level responsibilities.

Share this Progress Note

Attachment

Create

Cancel

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 ↕
<a href="#">Recognition of observed behaviors</a>	<i>private</i>	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 ↕
<a href="#">Recognition of observed behaviors</a>	<i>shared</i>	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: [kareem.crosdale@untsystem.edu](mailto:kareem.crosdale@untsystem.edu)
  - Phone: 940-369-6353
- HSC Campus HR Team
  - Performance management concerns, discussion about unsatisfactory ratings
  - Email: [HSC.HR@untsystem.edu](mailto:HSC.HR@untsystem.edu)
  - Phone: 817-735-2690
- Performance Management Web Page <https://hr.untsystem.edu/peopleadmin>