



PeopleAdmin Performance Management User Guide

HSC FY 2023 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

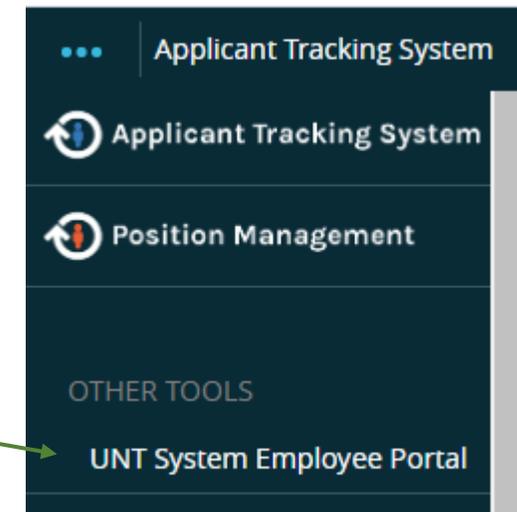
- Via employee portal link: <https://my.untsystem.edu>; go to PeopleAdmin section and select the link for Performance Management
- Or go to: <https://jobs.untsystem.edu/portal>
- Log-in with EUID and Password
- All supervisors and employees can access system



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

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

Home **13** Performance ▾ Progress Notes 1

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
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 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

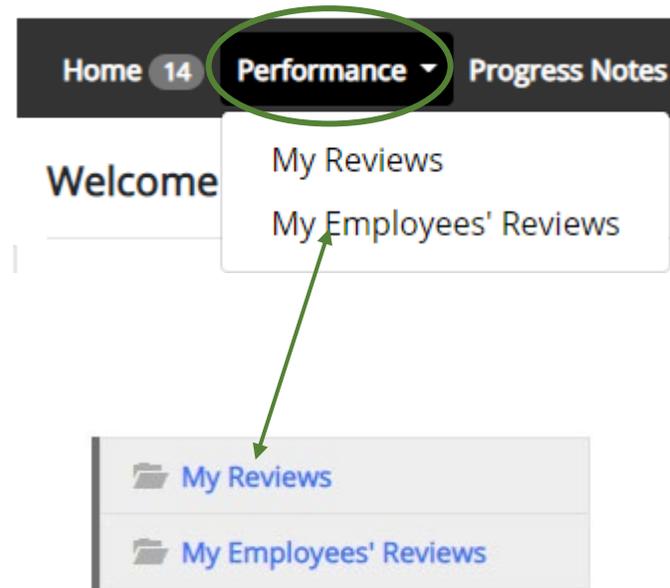
Showing 1 to 13 of 13 entries

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.

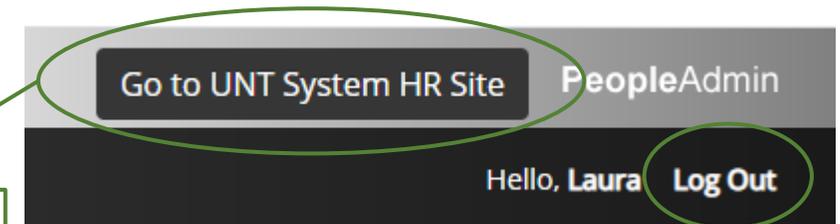


Navigation (cont.)

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.)

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

Home **2** Performance Progress Notes Hello, Patricia [Log Out](#)

Patricia

Program: All Programs
Reporting org unit: All Org Units
Program Type: All Types
Open/Completed: All

My Reviews

Program	Progress	Type	Score	Review Status	Last Update	Action
UNTHSC New Team Member Process	<div style="width: 100%;"></div>	Annual	-	Cancelled	May 12, 2020 11:20	View Review
UNTHSC Supervisor Year 1	<div style="width: 100%;"></div>	Annual	-	Cancelled	May 12, 2020 11:18	View Review
UNTHSC Supervisor Year 1 (Multi-rater test)	<div style="width: 100%;"></div>	Annual	-	Open	May 12, 2020 04:22	View Review

Showing 1 to 3 of 3 entries

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

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.)



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

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

Reviews Dashboard

Reset Program: Employee Name Group by:

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

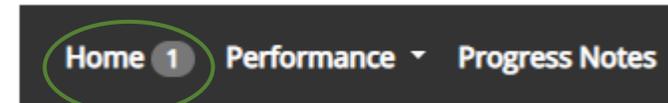
Last name	First Name	Anniversary Date	Progress	Program	Score
UNTHSC Non-Manager Year 1 (Multi-rater test) 2					
	Monica	2003-09-01	0/6 1 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	UNTHSC Non-Manager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

Previous **1** Next

Task Not Started / Unavailable
 Task Completed
 Task Open
 Task Disputed



Beginning the Review Process



My Reviews

Program	Progress	Type	Score	Review Status	Last Update
HSC FY 2023 Performance Evaluation Program	<div style="width: 100%;"></div>	Annual	-	Open	November 23, 2022 13:30

Showing 1 to 1 of 1 entries

Welcome to the Employee Portal, Ramona

Your Action Items

Item	Description	Due Date
HSC FY 2023 Performance Evaluation Program for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 11 days

Showing 1 to 1 of 1 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. **Performance Check-In** – supervisor advises employee of initial progress towards achieving objectives and key results and makes any necessary adjustment.
4. **Self Evaluation** – employee rates self on goals and objectives.
5. **Supervisor Evaluation** – supervisor rates employee.
6. **Second Level Supervisor Approval** – second level supervisor indicates agreement with the content of the evaluation.
7. **End of Year Review meeting** – supervisor and employee meet to review the supervisor evaluation.
8. **Employee Acknowledges Evaluation** – employee acknowledges receipt of evaluation materials and score.



HSC Objectives & Key Results Achievement

Delivered Key Results (Summary Measure of Overall Performance)

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 **65%** of the overall evaluation score for all employees. These can be further broken down into Individual or optional Team OKRs.



HSC Global Objectives

1. Showed Initiative
2. Demonstrated Functional Knowledge and Skills
3. Maintained a High Level of Trust with Department Customers
4. Behaved in a Collaborative Manner
5. Communicated Effectively with Others

Global objectives will make up **35%** of the overall evaluation score for all employees.



Establish Objectives & Key Results

[Go to UNT System HR Site](#)

[PeopleAdmin](#)



[Home](#) **3** [Performance](#) [Progress Notes](#) 15

Hello, Ramona [Log Out](#)

Welcome to the Employee Portal, Ramona

Your Action Items

Start typing to search

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 11 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 11 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 11 days	Upcoming

Showing 1 to 3 of 3 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 Performance **Progress Notes 15** Hello, Ramona Log Out

Ramona Holmes
Supervisor: Daniel
Position Description: Associate
Department: UNT Health Science Center

Overview
Plan
Supervisor Evaluation
Self Evaluation
My Reviews
My Employees' Reviews

Plan for Ramona

Actions

HSC FY 2023 Performance Evaluation Program
Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 09/01/22 to -
Last Updated: November 23, 2022 13:06

Instructions:
Tab 1 - Objectives & Key Results Achievement:

- Meet with your supervisor to complete the Objectives & Key Results (OKR) worksheet prior to entering information below.
- 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.
- You can designate team objectives (optional) with a (T)
- If an objective is a team objective, please list the team member names in the at the end of the objective.
- 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 - 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](#).

Objectives & Key Results Achievement Global Objectives Achievement

This tab contains the factors utilized to evaluate overall performance on established Objectives and Key Results (OKRs). 65% of the overall evaluation score will be based on employee performance of 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.

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

Remove Entry?

Add Entry

Save Draft Save & Continue

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



Establish Objectives & Key Results (cont.)

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

This tab contains the factors utilized to evaluate overall performance on established Objectives and Key Results (OKRs). 65% of the overall evaluation score will be based on employee performance of 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.

* Performance Targets - What I will do in 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 objectives and key results into the appropriate section for assessment as well as the specific targets to be achieved. You can designate team objectives (optional) with a (T). If additional OKRs need to be entered, select the add entry button. 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.

****OKRs account for 65% 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.)

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

This tab contains the factors utilized to evaluate performance on established Global Objectives. 35% of the overall evaluation score will be based on employee performance relating to these objectives.

[Check spelling](#)

Global Objectives Achievement

Global Objective

Showed Initiative

Example behaviors at Meets Expectations

Non-Supervisor (Individual Contributor):

- Responds appropriately on own to improve outcomes, processes, or practices in the unit or another area.
- Accomplishes goals independently, with little or no need for supervision.
- Maintains ownership and accountability for own performance.
- Generates new ideas and thinks creatively to solve problems.
- Sees a problem and attempts to fix the problem using sound logic and decision-making skills without being told/prodded.
- Open to new ideas/changes and makes modifications without management intervention.

Supervisors:

- Creates new ideas and processes, regardless of whether there is any ambiguity within the situation.
- Actively seeks out ways on own to solve problems and improve outcomes, processes, and practices identifying root causes and solutions and using sound logic, evidence, and decision-making skills.
- Acts responsibly and provides leadership on projects and initiatives with appropriate follow-through.
- Acts on projects without being directed to do so, and looks for opportunities to move projects along recognizing typical, complex, and emerging problems and finds ways to address them.
- Seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages and recognizes staff when they identify and address process improvements and problems, and to participate in projects and on committees when appropriate.

Global Objective

Demonstrated Functional Knowledge and Skills

Example behaviors at Meets Expectations

Non-Supervisor (Individual Contributor):

- Demonstrates skills and knowledge needed in one's job, department, and overall organization.
- Applies current best practices to work performed.
- Maintains awareness of innovations and major developments in one's field.
- Seeks opportunities for personal and professional development.
- Completes assignments with intended results as expected.
- Recognized by customers and team members for effective functional knowledge and skills.

Supervisors:

- Demonstrates knowledge and skills within the areas of oversight and responsibility (one's job), department, and overall organization.
- Develops best practices in the areas of oversight and responsibility.
- Serves as a resource for direct reports on major developments and everyday operations.
- Perceived by customers and direct reports as possessing high functional knowledge and skills.
- Holds direct reports accountable for meeting expectations.
- Seeks opportunities for personal and professional development for themselves, and encourages it within their team.

[Save Draft](#)

[Complete](#)

Tab 2: 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 5 global objectives, each one lists the expected behaviors for achievement for both supervisors as well as non-supervisors. Global Objectives account for 35% of the overall score****



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 screenshot shows the UNT System Employee Portal interface. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes'. A search bar is present with the text 'Start typing to search'. Below the navigation bar, there is a sidebar with 'My Reviews', 'My Employees' Reviews', and 'My Multi Rater Feedback'. The main content area is titled 'Your Action Items' and contains a table with the following data:

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 11 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 11 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 11 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	Supervisor Approves Objectives & Key Results	2022-12-09 Due in 11 days	Upcoming

Showing 1 to 4 of 4 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.)

Home Performance Progress Notes 6 Hello, Daniel Log Out

Ramona

Supervisor: Daniel

Position Description: Associate

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

Self Evaluation

Multi-rater Feedback

Approvals & Acknowledgements

History

My Reviews

My Employees' Reviews

My Multi Rater Feedback

Plan for Ramona

Actions

HSC FY 2023 Performance Evaluation Program

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 09/01/22 to -

Last Updated: November 28, 2022 11:49

Last Completed Step: Establish Objectives & Key Results

Co-reviewer: Add Co-reviewer

Instructions:

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

Objectives & Key Results Achievement

This tab contains the factors utilized to evaluate overall performance on established Objectives and Key Results (OKRs). 65% of the overall evaluation score will be based on employee performance of OKRs.

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

Objective 1

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 1

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

Performance Targets 1

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

Objective 2

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 2

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

Performance Targets 2

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.)

Global Objectives Achievement

This tab contains the factors utilized to evaluate performance on established Global Objectives. 35% of the overall evaluation score will be based on employee performance relating to these objectives.

Global Objective

Shown Initiative

Example behaviors at Meets Expectations

Non-Supervisor (Individual Contributor):

- Responds appropriately on own to improve outcomes, processes, or practices in the unit or another area.
- Accomplishes goals independently, with little or no need for supervision.
- Maintains ownership and accountability for own performance.
- Generates new ideas and thinks creatively to solve problems.
- Sees a problem and attempts to fix the problem using sound logic and decision-making skills without being told/prodded.
- Open to new ideas/changes and makes modifications without management intervention.

Supervisors:

- Creates new ideas and processes, regardless of whether there is any ambiguity within the situation.
- Actively seeks out ways on own to solve problems and improve outcomes, processes, and practices identifying root causes and solutions and using sound logic, evidence, and decision-making skills.
- Acts responsibly and provides leadership on projects and initiatives with appropriate follow-through.
- Acts on projects without being directed to do so, and looks for opportunities to move projects along recognizing typical, complex, and emerging problems and finds ways to address them.
- Seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages and recognizes staff when they identify and address process improvements and problems, and to participate in projects and on committees when appropriate.

Global Objective

Demonstrated Functional Knowledge and Skills

Example behaviors at Meets Expectations

Non-Supervisor (Individual Contributor):

- Demonstrates skills and knowledge needed in one's job, department, and overall organization.
- Applies current best practices to work performed.
- Maintains awareness of innovations and major developments in one's field.
- Seeks opportunities for personal and professional development.
- Completes assignments with intended results as expected.
- Recognized by customers and team members for effective functional knowledge and skills.

Supervisors:

- Demonstrates knowledge and skills within the areas of oversight and responsibility (one's job), department, and overall organization.
- Develops best practices in the areas of oversight and responsibility.
- Serves as a resource for direct reports on major developments and everyday operations.
- Perceived by customers and direct reports as possessing high functional knowledge and skills.
- Holds direct reports accountable for meeting expectations.
- Seeks opportunities for personal and professional development for themselves, and encourages it within their team.

 Check spelling

Comment

 Return  Approve

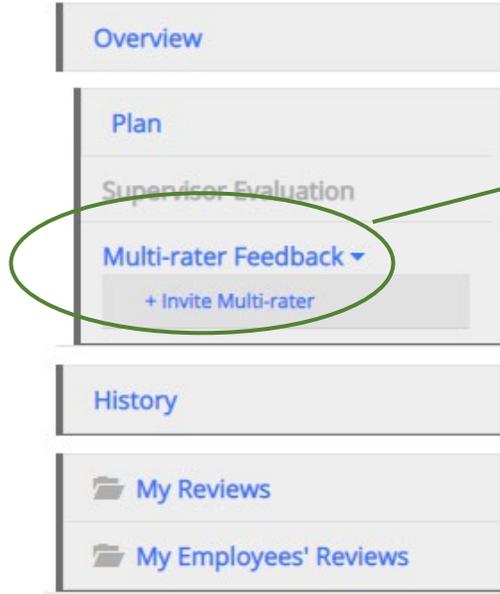
The supervisor will be able to review all factors used to assess as the global objectives. Note – these are not editable by the supervisor nor the employee.

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



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		
<input checked="" type="checkbox"/>	Name	Login	Department	Supervisor
<input checked="" type="checkbox"/>	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.)

The screenshot shows the UNT System Employee Portal interface. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes'. The user is identified as 'Kareem'. Below the navigation bar, a welcome message reads 'Welcome to the Employee Portal, Kareem'. On the left side, there are two menu items: 'My Reviews' and 'My Multi Rater Feedback'. The main content area is titled 'Your Action Items' and contains a search bar with the placeholder text 'start typing to search'. Below the search bar is a table with the following data:

Item	Description	Due Date	Status
UNTHSC Supervisor Year 1 (Multi-rater test) for Rebel	Multi-Rater Feedback	n/a	Available

Below the table, it says '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.)

UNT SYSTEM Home Performance Progress Notes Hello, Kareem Log Out

Multi Rater Feedback for Actions

Supervisor:
Position Description:
Department: UNT Health Science Center

Peer Review

- My Reviews
- My Multi Rater Feedback

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

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.

- Overview
- Plan
- Supervisor Evaluation
- Self Evaluation
- Multi-rater Feedback ▾
 - Kareem Crosdale ×
 - + Invite Multi-rater
- Approvals & Acknowledgements
- History
- My Reviews
- My Employees' Reviews

Home Performance Progress Notes Hello Log Out

Multi Rater Feedback for Rebel (Score: Unrated) Actions

Supervisor: **Additional Reviewer**

Position Description: Director. 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.

Department: UNT Health Science Center

Overall Rating: Meets Expectations

Evaluation Type: Annual

Program Timeframe: 01/01/20 to -

Last Updated: May 14, 2020 17:55

Last Completed Step: Employee Acknowledges Evaluation

Co-reviewer: N/A

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.

<input type="text" value="Kareem"/>	<input type="text" value="Crosdale"/>	<input type="text" value="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.



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.

The screenshot shows the UNT SYSTEM Employee Portal. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes 6'. The user is identified as 'Daniel' with a 'Log Out' option. The main content area is titled 'Your Action Items' and contains a search bar. Below the search bar is a table with the following data:

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	Performance Check-In	2023-02-15 Due in 3 months	Upcoming

A green double-headed arrow highlights the 'Performance Check-In' task. The bottom of the table indicates 'Showing 1 to 4 of 4 entries'.

The supervisor will be notified via email that there is a task open for them to act on within the system. This can also be accessed from the “Home” screen; the supervisors will select the relevant evaluation link for the specific employee.



Performance Check-In (Cont.)

UNT SYSTEM Home Performance Progress Notes

Ramona Actions

Supervisor: Daniel
Position Description: Associate
Department: UNT Health Science Center

Plan for Ramona

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.
- Enter comments to indicate progress towards meeting the established targets. Utilize the "Progress Notes" function to document additional details regarding the achievement of targets 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 **Acknowledge**.

Objectives & Key Results Achievement

This tab contains the factors utilized to evaluate overall performance on established Objectives and Key Results (OKRs). 60% of the overall evaluation score will be based on employee performance of OKRs.

Objective 1

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.

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

Objective 2

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.

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

Global Objectives Achievement

This tab contains the factors utilized to evaluate performance on established Global Objectives. 35% of the overall evaluation score will be based on employee performance relating to these objectives.

Global Objective

Showed Initiative

Example behaviors at Meets Expectations

Non-Supervisor (Individual Contributor):

- Responds appropriately on own to improve outcomes, processes, or practices in the unit or another area.
- Accomplishes goals independently, with little or no need for supervision.
- Maintains ownership and accountability for own performance.
- Generates new ideas and thinks creatively to solve problems.
- Sees a problem and attempts to fix the problem using sound logic and decision-making skills without being told/prodded.
- Open to new ideas/changes and makes modifications without management intervention.

Supervisors:

- Creates new ideas and processes, regardless of whether there is any ambiguity within the situation.
- Actively seeks out ways on own to solve problems and improve outcomes, processes, and practices identifying root causes and solutions and using sound logic, evidence, and decision-making skills.
- Acts responsibly and provides leadership on projects and initiatives with appropriate follow-through.
- Acts on projects without being directed to do so, and looks for opportunities to move projects along recognizing typical, complex, and emerging problems and finds ways to address them.
- Seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages and recognizes staff when they identify and address process improvements and problems, and to participate in projects and on committees when appropriate.

Global Objective

Demonstrated Functional Knowledge and Skills

Example behaviors at Meets Expectations

Non-Supervisor (Individual Contributor):

- Demonstrates skills and knowledge needed in one's job, department, and overall organization.
- Applies current best practices to work performed.
- Maintains awareness of innovations and major developments in one's field.
- Seeks opportunities for personal and professional development.
- Completes assignments with intended results as expected.
- Recognized by customers and team members for effective functional knowledge and skills.

Supervisors:

- Demonstrates knowledge and skills within the areas of oversight and responsibility (one's job, department, and overall organization).
- Develops best practices in the areas of oversight and responsibility.
- Serves as a resource for direct reports on major developments and everyday operations.
- Perceived by customers and direct reports as possessing high functional knowledge and skills.
- Holds direct reports accountable for meeting expectations.
- Seeks opportunities for personal and professional development for themselves, and encourages it within their team.

Comment

Check spelling

Acknowledge

Supervisors will be able to review the objectives and key results which were entered for the review period by scrolling down the page. They can then enter comments to indicate progress towards meeting these targets. Progress notes (see Appendix) can be utilized to enter additional details. Once the supervisor has met with the employee and given them an update on their progress, they will select the "Acknowledge" 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 or stacie.fredrickson@untsystem.edu) for assistance.



Complete Self-Evaluation

Once the performance check-in has concluded, the employee will then be required to complete their Self-evaluation.

The screenshot shows the UNT SYSTEM Employee Portal interface. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes 15'. A user greeting 'Hello, Ramona' and a 'Log Out' link are visible on the right. Below the navigation bar, a welcome message reads 'Welcome to the Employee Portal, Ramona'. On the left, there are menu items for 'My Reviews' and 'My Employees' Reviews'. The main content area is titled 'Your Action Items' and contains a search bar with the placeholder text 'Start typing to search'. Below the search bar is a table with the following data:

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	Self-Evaluation	2023-04-14 Due in 5 months	Upcoming

A green double-headed arrow is positioned over the 'Self-Evaluation' task row. Below the table, it says 'Showing 1 to 3 of 3 entries'.

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



Complete Self-Evaluation (Cont.)

Home Performance - Progress Notes 19 Hello, Ramona Log Out

Ramona
Supervisor: Daniel Burgard
Position Description: Associate
Department: UNT Health Science Center

Self Evaluation for Ramona

Actions

HSC FY 2023 Performance Evaluation Program

Review Status: Open
Evaluation Type: Annual
Program Timeframe: 09/01/22 to -
Last Updated: November 28, 2022 13:59
Last Completed Step: Performance Check-in

Instructions:
Tab 1 - 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 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 - Global Objectives Assessment:
• Scroll down the page to select a rating for each global objective and provide appropriate feedback regarding your performance in these areas.
• If you would like to add supporting documentation, please select the "Attachments" link.
• Select **Save Draft** if you wish to review or edit information before finalizing.
• Select **Complete** when all actions have been completed and you are ready to submit your self-evaluation to your supervisor.

Objectives & Key Results Assessment Global Objectives Assessment Attachments 0 Check spelling

This tab contains the factors utilized to evaluate overall performance on established Objectives and Key Results (OKRs). 65% of the overall evaluation score will be based on employee performance of OKRs.

Required fields are indicated with an asterisk (*).

Objectives & Key Results Assessment

My Objective: What do I want to do to support my Business Unit?:
Objective 1

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 1

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

* Key Results Met?
▼

Tab 1 (Objectives & Key Results Assessment): After scrolling down the page, the employee will indicate if they have met their key results for each objective using the drop-down menu.

****OKRs make up 65% of the overall evaluation score.****

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.)

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.

Tab 1 (Objectives & Key Results Assessment Cont.): After scrolling down the page, 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.

****OKRs make up 65% of the overall evaluation score.****

* 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?



Complete Self-Evaluation (Cont.)

Objectives & Key Results Assessment | Global Objectives Assessment | Attachments

This tab contains the factors utilized to evaluate performance on established Global Objectives. 35% of the overall evaluation score will be based on employee performance relating to these objectives.

Required fields are indicated with an asterisk (*).

Shown Initiative

Example behaviors at Meets Expectations

Non-Supervisor:

- Responds appropriately on own to improve outcomes, processes, or practices in the unit or another area.
- Accomplishes goals independently, with little or no need for supervision.
- Maintains ownership and accountability for own performance.
- Generates new ideas and thinks creatively to solve problems.
- Sees a problem and attempts to fix the problem using sound logic and decision-making skills without being told/prodded.
- Open to new ideas/changes and makes modifications without management intervention.

Supervisor:

- Creates new ideas and processes, regardless of whether there is any ambiguity within the situation.
- Actively seeks out ways on own to solve problems and improve outcomes, processes, and practices identifying root causes and solutions and using sound logic, evidence, and decision-making skills.
- Acts responsibly and provides leadership on projects and initiatives with appropriate follow-through.
- Acts on projects without being directed to do so, and looks for opportunities to move projects along recognizing typical, complex, and emerging problems and finds ways to address them.
- Seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages and recognizes staff when they identify and address process improvements and problems, 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)

Remove Entry?

Communicated Effectively with Others

Example behaviors at Meets Expectations

Non-Supervisor:

- Shares important information with others.
- Listens carefully and asks questions when needed.
- Communicates relevant information in a clear, concise, and timely manner.
- Demonstrates professionalism through courteous and respectful conduct.
- Demonstrates an awareness of when to adjust communication style based on the situation.

Supervisor:

- Provides regular, consistent, and meaningful information to customers and direct reports.
- Employs active listening skills to carefully listen to others, asks questions for clarification, and ensures message is understood.
- Depending upon the content of the message, communicates using an appropriate method of communication (email, phone, in person).
- In meetings, demonstrates an ability to influence others by modeling appropriate body language and nonverbal communication.
- Tailors communications to the needs of each situation and the audience and ensures content is clear, concise, accurate, and professional.
- Encourages direct reports to communicate consistently, clearly, and professionally to customers and with each other.

* 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?

Tab 2 (Global Objectives): On the second 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 5 Global Objectives, and they make up 35% of the overall evaluation score****



Complete Supervisor Evaluation

UNT SYSTEM Home Performance Progress Notes 6 Hello, Daniel Log Out

Welcome to the Employee Portal, Daniel

Your Action Items

Start typing to search

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	Supervisor Evaluation	2023-05-31 Due in 6 months	Upcoming

Showing 1 to 4 of 4 entries

Once the self evaluation is complete, the supervisor will be notified via email. The Supervisor will select the 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 screenshot displays the 'Supervisor Evaluation' page for Ramona Holmes. The left sidebar contains a navigation menu with 'Supervisor Evaluation' selected. The main content area is titled 'Supervisor Evaluation for Ramona Holmes (Score in progress: Unrated)'. It includes instructions for the evaluation process, a 'Global Objectives Assessment' section, and a 'My Objective' section with a dropdown menu for 'Key Results Met?'. A green arrow points from the 'Supervisor Evaluation' menu item to the 'My Objective' section.

Tab 1 (Objectives & Key Results Assessment): After scrolling down the page, the supervisor will indicate if the employee has met their key results for each objective using the drop-down menu.

****OKRs make up 65% of the overall evaluation score.****

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.)

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.

Tab 1 (Objectives & Key Results Assessment Cont.): After scrolling down the page, 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.

****OKRs make up 65% of the overall evaluation score.****

* 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?



Supervisor Evaluation (Cont.)

Tab 2 (Global Objectives): On the second 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 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 5 Global Objectives, and they make up 35% of the overall evaluation score****

Objectives & Key Results Assessment Global Objectives Assessment

This tab contains the factors utilized to evaluate performance on established Global Objectives. 35% of the overall evaluation score will be based on employee performance relating to these objectives.

Required fields are indicated with an asterisk (*).

Attachments  [Check spelling](#)

Showing Initiative

Example behaviors at Meets Expectations

Non-Supervisor :

- Responds appropriately on own to improve outcomes, processes, or practices in the unit or another area..
- Accomplishes goals independently, with little or no need for supervision.
- Maintains ownership and accountability for own performance.
- Generates new ideas and thinks creatively to solve problems.
- Sees a problem and attempts to fix the problem using sound logic and decision-making skills without being told/prodded.
- Open to new ideas/changes and makes modifications without management intervention.

Supervisor:

- Creates new ideas and processes, regardless of whether there is any ambiguity within the situation.
- Actively seeks out ways on own to solve problems and improve outcomes, processes, and practices identifying root causes and solutions and using sound logic, evidence, and decision-making skills.
- Acts responsibly and provides leadership on projects and initiatives with appropriate follow-through.
- Acts on projects without being directed to do so, and looks for opportunities to move projects along recognizing typical, complex, and emerging problems and finds ways to address them.
- Seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages and recognizes staff when they identify and address process improvements and problems, 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)

Remove Entry?

Communicated Effectively with Others

Example behaviors at Meets Expectations

Non-Supervisor:

- Shares important information with others.
- Listens carefully and asks questions when needed.
- Communicates relevant information in a clear, concise, and timely manner.
- Demonstrates professionalism through courteous and respectful conduct.
- Demonstrates an awareness of when to adjust communication style based on the situation.

Supervisor:

- Provides regular, consistent, and meaningful information to customers and direct reports.
- Employs active listening skills to carefully listen to others, asks questions for clarification, and ensures message is understood.
- Depending upon the content of the message, communicates using an appropriate method of communication (email, phone, in person).
- In meetings, demonstrates an ability to influence others by modeling appropriate body language and nonverbal communication.
- Tailors communications to the needs of each situation and the audience and ensures content is clear, concise, accurate, and professional
- Encourages direct reports to communicate consistently, clearly, and professionally to customers and with each other.

* 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?



Second Level Supervisor Approves Evaluation (cont.)

Home 4 Performance ▾ Progress Notes 1 Hello, Charles Log Out

Welcome to the Employee Portal, Charles

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

Your Action Items

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Charles	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Charles	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Charles	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	Second Level Supervisor Approves Evaluation	2023-05-31 Due in 6 months	Upcoming

Showing 1 to 4 of 4 entries

The Second Level Supervisor (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.)

Supervisor Evaluation for Ramona

Second Level Approval Instructions:

- Review the 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**.

Objectives & Key Results Assessment

This tab contains the factors utilized to evaluate overall performance on established Objectives and Key Results (OKRs). 65% of the overall evaluation score will be based on employee performance of OKRs.

Objective 1

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

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.:

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

Key Results Met?

Yes

Objective 2

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

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.:

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

Key Results Met?

Yes

Top Right Summary:

HSC FY 2023 Performance Evaluation Program

Review Status: **Open**

Overall Rating: Meets Expectation

Evaluation Type: Annual

Program Timeframe: 09/01/22 to -

Last Updated: November 28, 2022 17:58

Last Completed Step: Supervisor Evaluation

The employee's evaluation score can be found at the top right side of the screen.

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.)

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

Meets Expectations

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

Feedback

Showed Initiative

Example behaviors at Meets Expectations

Non-Supervisor :

- Responds appropriately on own to improve outcomes, processes, or practices in the unit or another area.
- Accomplishes goals independently, with little or no need for supervision.
- Maintains ownership and accountability for own performance.
- Generates new ideas and thinks creatively to solve problems.
- Sees a problem and attempts to fix the problem using sound logic and decision-making skills without being told/prodded.
- Open to new ideas/changes and makes modifications without management intervention.

Supervisor:

- Creates new ideas and processes, regardless of whether there is any ambiguity within the situation.
- Actively seeks out ways on own to solve problems and improve outcomes, processes, and practices identifying root causes and solutions and using sound logic, evidence, and decision-making skills.
- Acts responsibly and provides leadership on projects and initiatives with appropriate follow-through.
- Acts on projects without being directed to do so, and looks for opportunities to move projects along recognizing typical, complex, and emerging problems and finds ways to address them.
- Sees and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
- Encourages and recognizes staff when they identify and address process improvements and problems, and to participate in projects and on committees when appropriate.

Rating - Select one from drop-down menu

Exceeds Expectations

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

Feedback

Behaved in a Collaborative Manner

Example behaviors at Meets Expectations

Non-Supervisor:

- Treats all people with dignity and respect and inspires others to do the same.
- Attempts to resolve interpersonal conflicts constructively.
- Assists others when asked or when it appears they need help.
- Promotes diversity of thought, ideas, and people by actively participating in opportunities to support awareness and respect of differences of others.
- Listens to and considers the ideas of others even when different from one's own.
- Seeks opportunities to engage/work with others, share new ideas and best practices, and break through communication barriers.
- Gives, asks for and values feedback.

Supervisor:

- Constantly treats everyone with dignity, respect, and equity and inspires others to do the same.
- Effectively addresses interpersonal conflicts within their unit.
- Helps direct reports in accomplishing job tasks and achieving career success.
- Promotes diversity of thought, ideas, and people by actively promoting awareness and respect of differences of others.
- Listens to and carefully considers the ideas of their direct reports.
- Encourages teamwork among their direct reports.
- Provides constructive feedback to staff and team members and accepts and values constructive feedback.

Rating - Select one from drop-down menu

Exceeds Expectations

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

Feedback

Communicated Effectively with Others

Example behaviors at Meets Expectations

Non-Supervisor:

- Shares important information with others.
- Listens carefully and asks questions when needed.
- Communicates relevant information in a clear, concise, and timely manner.
- Demonstrates professionalism through courteous and respectful conduct.
- Demonstrates an awareness of when to adjust communication style based on the situation.

Supervisor:

- Provides regular, consistent, and meaningful information to customers and direct reports.
- Employs active listening skills to carefully listen to others, asks questions for clarification, and ensures message is understood.
- Depending upon the content of the message, communicates using an appropriate method of communication (email, phone, in person).
- In meetings, demonstrates an ability to influence others by modeling appropriate body language and nonverbal communication.
- Tailors communications to the needs of each situation and the audience and ensures content is clear, concise, accurate, and professional.
- Encourages direct reports to communicate consistently, clearly, and professionally to customers and with each other.

Rating - Select one from drop-down menu

Exceeds 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](#)

[Return to Supervisor](#) [Acknowledge](#)

After reviewing all the entries which have been made, 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 for the supervisor to revise the review.



End of Year Review Meeting

UNT SYSTEM Home Performance Progress Notes Hello, Daniel Log Out

Welcome to the Employee Portal, Daniel

Your Action Items

Start typing to search

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Daniel	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	End of Year Meeting	2023-05-31 Due in 6 months	Upcoming

Showing 1 to 4 of 4 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.)

The screenshot shows the UNT System Performance Evaluation Program interface for Ramona. The main content area is titled "End of Year Meeting" and contains instructions for supervisors. A "Complete" button is visible at the bottom right of the instructions. The right sidebar shows the review status as "Open" and an overall rating of "Meets Expectations".

UNT SYSTEM Home Performance Progress Notes Hello, Daniel Log Out

Ramona
Supervisor: Daniel
Position Description: Associate
Department: UNT Health Science Center

End of Year 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 review period
- Once the review meeting with the employee is complete, select Complete.

[Complete](#)

HSC FY 2023 Performance Evaluation Program

Review Status: **Open**

Overall Rating: Meets Expectations

Evaluation Type: Annual
Program Timeframe: 09/01/22 to -
Last Updated: November 28, 2022 20:18
Last Completed Step: Second Level Supervisor Approves Evaluation
Co-reviewer: N/A

Overview

- Plan
- Supervisor Evaluation
- Self Evaluation
- Multi-rater Feedback
- Approvals & Acknowledgements

History

- My Reviews
- My Employees' Reviews
- My Multi Rater Feedback

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

UNT SYSTEM | Home | Performance | Progress Notes 15 | Hello, Ramona | Log Out

Welcome to the Employee Portal, Ramona

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

Your Action Items

Item	Description	Due Date	Status
HSC FY 2023 Performance Evaluation Program for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML for Ramona	Establish Objectives & Key Results	2022-12-09 Due in 10 days	Upcoming
HSC FY 2023 Performance Evaluation Program Updated ML V2 for Ramona	Employee Acknowledges Evaluation	2023-05-31 Due in 6 months	Upcoming

Showing 1 to 3 of 3 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.)

The screenshot displays the 'Supervisor Evaluation' page for Ramona. It includes a navigation menu on the left with options like 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Approvals & Acknowledgements', 'My Reviews', and 'My Employees' Reviews'. The main content area is divided into sections for 'Individual Objectives & Key Results Assessment', 'Behaved in a Collaborative Manner', and 'Communicated Effectively with Others'. Each section contains instructions, a rating dropdown menu, and a feedback text area. A green arrow labeled 'Overall Rating' points to the 'Meets Expectations' status in the top right. At the bottom right, an 'Acknowledge' button is highlighted with a green circle.

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

Home Performance Progress Notes 15

Ramona

Supervisor: Daniel
Position Description: Associate

Department: UNT Health Science Center

Overview

- Plan
- Supervisor Evaluation
- Self Evaluation
- Approvals & Acknowledgements

My Reviews
My Employees' Reviews

Task
1 Establish Objectives & Key Results
2 Supervisor Approves Objectives & Key Results
3 Performance Check-in
4 Self-Evaluation
5 Supervisor Evaluation
6 Second Level Supervisor Approves Evaluation
7 End of Year Meeting
8 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

Home Performance Progress Notes

Go to UNT System HR Site PeopleAdmin

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, [User] Log Out

Progress Notes [Create Progress Note](#)

Search

Title ↕	Shared ↕	Program ↕	Date ↕	Type ↕	Author ↕	Employee ↕	
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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 ↕
Recognition of observed behaviors	<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 ↕
Recognition of observed behaviors	<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
 - Phone: 940-369-6353
- HSC Campus HR Team
 - Performance management concerns, discussion about unsatisfactory ratings
 - Email: HSC.HR@untsystem.edu
 - Phone: 817-735-2690
- Performance Management Web Page <https://hr.untsystem.edu/peopleadmin>