



People Admin Performance Management User Guide

HSC FY 2021 New Team Member Program



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

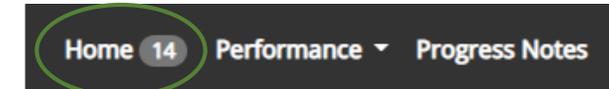


UNTHSC New Team Member Program Steps

1. Supervisor Creates Plan – Supervisor enters Objectives and creates an Objective Plan.
2. Supervisor Evaluation – Supervisor provides feedback and rates the employee's performance.
3. Review Meeting – Supervisor indicates that they have met with the employee and reviewed the evaluation.
4. Employee Acknowledges Evaluation - Employee acknowledges that they have received an evaluation.



Beginning the Review Process



Your Action Items

Item	Description
UNTHSC New Team Member Process for Alyson	Supervisor Creates Plan
UNTHSC New Team Member Process for Amanda	Supervisor Creates Plan
UNTHSC New Team Member Process for Christina	Supervisor Creates Plan
UNTHSC New Team Member Process for Deborah	Supervisor Creates Plan

All Reviews	Not Started	In Process	Complete	Overdue	Disputed
Last name	First Name	Anniversary Date	Progress		
94	0	94	0	0	0
UNTHSC New Team Member Process 41					
	John	2003-09-01	0/4	1	
	Rachel	2018-03-01	0/4	1	
	Allison	2019-07-01	0/4	1	
	Michael	2012-09-01	0/4	1	

To begin the evaluation process, the supervisor will select the employee's name from the list. The list of employees can be accessed from either the Home page or the My Employees' Reviews page.



Supervisor Creates Plan

The screenshot shows the PeopleAdmin interface for a supervisor named Alexander. The breadcrumb trail is Home > Performance > Progress Notes. The user is logged in as Jill. A table lists four tasks, with the first task, 'Supervisor Creates Plan', highlighted by a green arrow. The table columns are Task, Task Owner, Date Opened, Date Completed, and Due Date.

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Jill Supervisor	2021-06-01		2021-07-23
2 Supervisor Evaluation	Jill Supervisor			2021-07-30
3 End of Year Review Meeting	Jill Supervisor			2021-08-13
4 Employee Acknowledges Evaluation	Alexander			2021-08-18

On the right side of the interface, there is a summary for the 'UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)'. The review status is 'Open', the evaluation type is 'Annual', and the program timeframe is '09/29/20 to -'. It was last updated on June 15, 2021 at 16:16. There is a link to 'Add Co-reviewer'.

Select the first task link to begin the process to create the plan.



Supervisor Creates Plan (cont.)

Go to UNT System HR Site | PeopleAdmin | Hello, Jill | Log Out

Home | Performance | Progress Notes

Alexander

Supervisor: Jill
Position Description: Research
Department: UNT Health Science Center

Overview
Plan
Supervisor Evaluation
Multi-rater Feedback
History
My Reviews
My Employees' Reviews

Plan for Alexander

Instructions:

- Please enter an Objective and Objective Plan for the new team member. At least one objective and plan must be entered.
- Up to three Objectives/Plans can be entered. To add additional Objectives/Plans, select "Add Entry." If an objective is a team objective, please select the check box under "Is this a team objective?" and enter the team member names in the field below. Please do not select the "Remove Entry" button.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- Select "Complete" when all entries have been completed.

Required fields are indicated with an asterisk (*).

Check spelling

Objectives

Maximum of three entries

- * Objective: What should this team member do to support the Business Unit? - Begin statement with a verb.
- * Objective Plan (this may also be referred to as a Key Result): How will the team member accomplish this objective?

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

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

Remove Entry?

Add Entry

Save Draft Complete

Actions

UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 09/29/20 to -

Last Updated: June 15, 2021 16:16

Co-reviewer: Add Co-reviewer

Select "Save Draft" if you wish to review or edit information before finalizing or select "Complete" when all entries have been entered. This can be done by clicking the buttons at the bottom of the page. You may also print pages by selecting the Print option from the Actions drop down menu.

Enter an Objective and Objective Plan for the review period. For additional objectives, click the "Add Entry" button at the bottom of the page. A maximum of three Objectives/Plans may be entered. Utilize the checkbox to indicate team objectives and list all team members.



Supervisor Evaluation



Alexander

Supervisor: Jill

Position Description: [Research](#)

Department: UNT Health Science Center

[Overview](#)

[Plan](#)

[Supervisor Evaluation](#)

[Multi-rater Feedback](#) ▾

[History](#)

[My Reviews](#)

[My Employees' Reviews](#)

Home **6** Performance ▾ Progress Notes

[Go to UNT System HR Site](#)

PeopleAdmin

Hello, Jill [Log Out](#)

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan	Jill Supervisor	2021-06-01	2021-06-15	2021-07-23
2	Supervisor Evaluation	Jill Supervisor			2021-07-30
3	End of Year Review Meeting	Jill Supervisor			2021-08-13
4	Employee Acknowledges Evaluation	Alexander			2021-08-18



UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 09/29/20 to -

Last Updated: June 15, 2021 16:40

Last Completed Step: Supervisor Creates Plan

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

Select the second task link in the list to begin the Supervisor Evaluation.



Supervisor Evaluation (cont.)

Alexander

Supervisor: Jill
Position Description: [Research](#)

Department: UNT Health Science Center

Home 6 Performance ▾ Progress Notes

Go to UNT System HR Site PeopleAdmin

Hello, Jill Log Out

Supervisor Evaluation for Alexander

Actions ▾

Instructions:

- Please review performance on Objectives and Plans. Scroll to the Delivered Key Results Feedback section of the page. Enter Feedback on performance and enter Development needs in the appropriate sections.
- Enter the Overall Rating for performance of the Objectives and Plans. Select "On Track" or "Progress Needed".
- Select "Save Draft" if you wish to review or edit information before finalizing.
- If you would like to add supporting documentation, please select the "Attachments" link.
- Select "Complete" when all actions have been completed.

New Team Member Evaluation

Attachments 0

Check spelling

Required fields are indicated with an asterisk (*).

Delivered Key Results

Objective: What should this team member do to support the Business Unit? :

Objective 1

Objective Plan (this also may be referred to as a Key Result): How will the team member accomplish this objective?:

Objective Plan 1

Team Member List:

UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 09/29/20 to -

Last Updated: June 15, 2021 16:40

Last Completed Step: Supervisor Creates Plan

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

In the Supervisor Evaluation, the Supervisor will be able to review the objectives and objective plans which were entered for the employee before giving feedback on progress.



Supervisor Evaluation (cont.)

Objective: What should this team member do to support the Business Unit? :

Objective 2

Objective Plan (this also may be referred to as a Key Result): How will the team member accomplish this objective?:

Objective Plan 2

Team Member List:

1. A
2. B
3. C

Delivered Key Results Feedback

Example of "On Track" behaviors:

Delivered key results for all expected objectives and tasks.

Stayed focused on tasks and assignments to achieve key results.

Used time efficiently to achieve key results.

Was receptive to constructive critical feedback and implemented feedback to improve performance.

* Feedback - Provide feedback on progress toward new team member plan

All individual and team objectives have been successfully accomplished.

* Development - Provide feedback on opportunities for growth and improvement

Additional training is needed in Microsoft Excel.

Overall Rating

* Overall Rating - Select one from drop-down menu

On Track

Save Draft Complete

The Supervisor will scroll down the page to insert feedback on the progress the employee is making towards delivering the key results created in the plan. They will also indicate opportunities for the employee to grow and/or improve, and give an overall rating of the employee's performance. Select "Save Draft" to come back to the evaluation or "Complete" once done.



Review Meeting



Home **6** Performance ▾ Progress Notes

Go to UNT System HR Site PeopleAdmin

Hello, Jill Log Out

Alexander

Supervisor: Jill

Position Description: Research

Department: UNT Health Science Center

Overview

Plan

Supervisor Evaluation

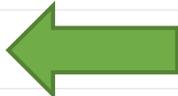
Multi-rater Feedback ▾

History

My Reviews

My Employees' Reviews

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan	Jill Supervisor	2021-06-01	2021-06-15	2021-07-23
2	Supervisor Evaluation	Jill Supervisor		2021-06-15	2021-07-30
3	End of Year Review Meeting	Jill Supervisor			2021-08-13
4	Employee Acknowledges Evaluation	Alexander Harlow			2021-08-18



UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)

Review Status: **Open**

Overall Rating: On Track

Evaluation Type: Annual

Program Timeframe: 09/29/20 to -

Last Updated: June 15, 2021 17:36

Last Completed Step: Supervisor Evaluation

Co-reviewer: N/A

The Supervisors will then select the third task link from the list when ready to meet with the employee to discuss the evaluation.



Review Meeting (cont.)

The screenshot shows the PeopleAdmin interface for an "End of Year Review Meeting". The top navigation bar includes "Go to UNT System HR Site", "PeopleAdmin", and "Hello, Jill Log Out". The breadcrumb trail is "Home > Performance > Progress Notes". On the left, the user profile for "Alexander" is shown, including supervisor "Jill Rhodes", position "Research", and department "UNT Health Science Center". A sidebar menu contains "Overview", "Plan", "Supervisor Evaluation", "Multi-rater Feedback", "History", "My Reviews", and "My Employees' Reviews". The main content area is titled "End of Year Review Meeting" and contains instructions: "Schedule time to meet with the employee and review the supervisor evaluation.", "If the overall evaluation score is 'Progress Needed', please consult with Campus HR before meeting with the employee.", "Initiate conversation with employee to establish Objectives and Key Results for the next fiscal year (Develop OKR template)", and "Once the review meeting with the employee is complete, select 'Complete'". A blue "Complete" button is located at the bottom right of the instructions. On the right side, a summary box displays: "UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)", "Review Status: Open", "Overall Rating: On Track", "Evaluation Type: Annual", "Program Timeframe: 09/29/20 to -", "Last Updated: June 15, 2021 17:36", "Last Completed Step: Supervisor Evaluation", and "Co-reviewer: N/A".

Before clicking on the “Complete” button, the supervisor must schedule time with the employee to review and discuss the Supervisor Evaluation. If the overall evaluation score is “Progress Needed”, a Campus HR representative must be consulted before meeting with the employee.



Employee Acknowledges Evaluation



Alexander

Supervisor: Jill

Position Description: [Research](#)

Department: UNT Health Science Center

[Overview](#)

[Plan](#)

[Supervisor Evaluation](#)

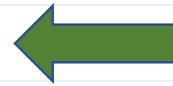
[My Reviews](#)

Home **1** Performance Progress Notes

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

Hello, Alexander [Log Out](#)

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan	Jill Supervisor	2021-06-01	2021-06-15	2021-07-23
2	Supervisor Evaluation	Jill Supervisor		2021-06-15	2021-07-30
3	End of Year Review Meeting	Jill Supervisor		2021-06-15	2021-08-13
4	Employee Acknowledges Evaluation	Alexander			2021-08-18



UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)

Review Status: **Open**

Overall Rating: On Track

Evaluation Type: Annual

Program Timeframe: 09/29/20 to -

Last Updated: June 15, 2021 17:45

Last Completed Step: End of Year Review Meeting

The employee will select the fourth task link to acknowledge and complete the evaluation.



Employee Acknowledges Evaluation (cont.)

Go to UNT System HR Site **PeopleAdmin**

Home 1 Performance ▾ Progress Notes Hello, Alexander Log Out

Alexander

Supervisor: Jill
Position Description: Research
Department: UNT Health Science Center

Overview
Plan
Supervisor Evaluation
Approvals & Acknowledgements
My Reviews

Supervisor Evaluation for Alexander Actions ▾

Instructions: Scroll down the page to review the Feedback, Development and Overall Rating sections of the form. Scroll to the bottom of the page to add comments if desired, and select "Acknowledge" to complete the evaluation. Selecting Acknowledge indicates receipt of the evaluation.

Delivered Key Results

Objective: What should this team member do to support the Business Unit? :
Objective 1

Objective Plan (this also may be referred to as a Key Result): How will the team member accomplish this objective?:
Objective Plan 1

Team Member List:

Objective: What should this team member do to support the Business Unit?:
Objective 2

Objective Plan (this also may be referred to as a Key Result): How will the team member accomplish this objective?:
Objective Plan 2

Team Member List:

1. A
2. B
3. C

UNT HSC FY 2021 New Team Member End of Year Evaluation Program (Copy)
Review Status: **Open**
Overall Rating: On Track
Evaluation Type: Annual
Program Timeframe: 09/29/20 to -
Last Updated: June 15, 2021 17:45
Last Completed Step: End of Year Review Meeting

The employee will be able to review the performance rating and any feedback that was entered by the supervisor. The performance rating may be found at the top right side of the screen.



Employee Acknowledges Evaluation (cont.)

Delivered Key Results Feedback

Example of "On Track" behaviors:

Delivered key results for all expected objectives and tasks.

Stayed focused on tasks and assignments to achieve key results.

Used time efficiently to achieve key results.

Was receptive to constructive critical feedback and implemented feedback to improve performance.

Feedback - Provide feedback on progress toward new team member plan

All individual and team objectives have been successfully accomplished.

Development - Provide feedback on opportunities for growth and improvement

Additional training is needed in Microsoft Excel.

Overall Rating

Overall Rating - Select one from drop-down menu

On Track

Comment

I agree, thank you.

 [Check spelling](#)

 Acknowledge

Before acknowledging receipt of the evaluation, the employee is able to enter comments related to the evaluation. Select "Acknowledge" once complete.



Evaluation Completed

Welcome to the Employee Portal,

Your Action Items

Item	Description
You don't have any Action items.	

Once an employee acknowledges their evaluation, the evaluation cycle is complete and the employee home screen should show no further action needed.



New Team Member Rating Structure

- **On Track**– Performance meets established objectives and fully completes normal job requirements.
- **Progress Needed**– Performance of established objectives is inconsistent; meets some of the minimum requirements of the position but needs to improve performance in other areas.

If an employee receives an overall score of “Progress Needed” please meet with Campus HR before conducting employee meeting.



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
- HSC Campus HR Team
 - Performance management concerns, discussion about unsatisfactory ratings
 - Email: HSC.HR@untsystem.edu
 - Phone: 817-735-2690