Who Utilizes

- The PeopleAdmin (PA) performance management tool is utilized to review most staff employees at UNT
  - Deans/Associate Deans and Faculty evaluations will be completed in the FIS system
  - Coaches/Assistant Coaches are not evaluated in PeopleAdmin
How to Access

• Via employee portal login: https://my.untsystem.edu
  • Select the tile for Staff Performance Evaluations
• All supervisors and employees can access system but not everyone will have action items at the same time.
The employee portal can also be accessed through the PeopleAdmin System at https://jobs.untsystem.edu/hr by clicking on the three dots in the top left corner of the page and then selecting “UNT System Employee Portal”
Navigation

The home screen displays a list of items that require action.

Your Action Items

Start typing to search

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNT 2021 Staff Performance Evaluation Program for Emily</td>
<td>Supervisor Creates Plan</td>
<td>2021-03-31 Due in 2 months</td>
<td>Upcoming</td>
</tr>
<tr>
<td>UNT 2021 Staff Performance Evaluation Program for Julie</td>
<td>Supervisor Creates Plan</td>
<td>2021-03-31 Due in 2 months</td>
<td>Upcoming</td>
</tr>
</tbody>
</table>
The supervisor can choose to view their own historical evaluations or the status of their employees reviews by selecting “Performance” at the top of the page or by selecting the “My Reviews” or “My Employees’ Reviews” on the left side of the page.

The “Go to UNT System HR Site” button takes the user out of the employee portal and back to the Applicant Tracking System or Position Management module.
The supervisor can access and view evaluations by clicking “My Employees Reviews” on the left side of the page. See the column labeled “Progress”. The progress steps change color as each step is completed. The color key is across the top bar. The disputed tab is not in use for this program.

The **Advanced button** allows 2nd level supervisors to drill down to view their entire organization and is also used to select previous year programs.
How to Access Historical Reviews

To review previous year’s programs that have been closed out, click the Advanced button to view the historical evaluations. Change the Program Status from Active to Closed to view closed programs from prior years.
Progress notes allow both the employee and supervisor to document achievements, kudos or coaching meetings throughout the year or at any step in the evaluation process such as the mid-year or year-end. For example, during the mid-year review a progress note can be created to attach a shared document. This document could be reviewed by both the manager and staff member when reviewing mid-year progress.

It is highly encouraged that supervisors add progress notes detailing performance conversations. Notes should include a brief overview of the progress the individual has made towards their goals.

To add a progress note, click the “Progress Notes” link at the top of the page, then click “Create Progress Note” on the right side of the page. A “New Progress Note” box will appear. Fill in the information and add supporting documents (if desired) by clicking “Attachments”.

There is an option to share progress note with the employee or supervisor. Click “create” when complete.
The supervisor can add a co-reviewer during the evaluation process. Co-Reviewer can be utilized if another reviewer should have full feedback capabilities to the employee’s evaluation. The co-reviewer has the ability to perform all the same steps as the supervisor. This might be used for someone who has a split reporting relationship or someone who recently transferred to a new job. The supervisor and co-reviewer will need to discuss who will be responsible for completion and submission of the evaluation steps. Note that only one person can submit the supervisor evaluation by clicking “Complete”. Otherwise, save as draft and the co-reviewer can access the evaluation document to review and provide feedback.
Multi-rater Feedback Feature

The supervisor can request performance feedback from other UNT World employees by selecting “Multi-rater Feedback” and clicking “Invite Multi-rater”.

Select the desired employee, click the check box next to their name and click “Save”. Multiple Multi-raters may be selected.

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. Once feedback has been provided in the Comments section, the multi-rater will click “Complete”.

Overview
Planning
Supervisor Evaluation
Self Evaluation
Multi-rater Feedback
Invite Multi-rater
Approvals & Acknowledgements
Attachments Feature

Click the Attachments link to upload emails, documents, etc. that are relevant to performance. Attachments are accessible to the employee and should be relevant to performance.
The employee can **print the evaluation** by selecting “Print” on the top right corner of the “Employee Acknowledges Evaluation” page.
Step 1: Supervisor Reviews/Creates Plan (Individual Goals Tab)

- Goals that were established during the prior year’s performance evaluation process will automatically load. These goals can be edited or removed if changes have occurred since the goals were previously established.
- Click on “Add Entry” to add goals or click on Remove Entry to delete goals.
- Select the “Save & Continue” button to proceed to the Job Duties/Competencies page.
Step 1: Supervisor Reviews/Creates Plan (cont.)
(Job Duties/Competencies Tab)

- Review job duties and select “Complete” to finalize the “Supervisor Reviews Plan” step
- Click “Save as Draft” in order to save the plan and return to complete it at a later time.

*Note: Click Apply to refresh any job duties that may have been updated in the position description.
Step 2: The staff member will have an action item on their Home screen to review and acknowledge the plan that was created by their supervisor. Upon review, click the Acknowledge button to complete the step.
Step 3: Mid-Year Check In

Step 3: The supervisor will have an Action Item on their Home page with a Description labeled “Mid-Year Check In” for each employee. Click on the action item line to go to the mid-year action page and to review the goals and job duties. The supervisor meets with the employee to review progress toward established goals and job duties/competencies. The supervisor can enter comments in the comments box. The supervisor can utilize the Progress Notes feature to capture additional comments and to add performance related attachments. Click Acknowledge after the mid-year discussion is completed.

See page 10 of this guide for details on the Progress Notes feature.
Step 4: The employee will have an Action Item on their Home page with a description labeled “Self-Evaluation (Optional)”. Employees should confirm with their Supervisor if they require completion of this step. Click on the action item to go to the self-evaluation page.

On the Individual Goals tab and the Job Duties tab, the employee enters comments and selects a rating. Click the Complete button to complete this step or the Save Draft button to return later.
Step 5: Supervisor Evaluation

The supervisor will have an action item on their home page labeled “Supervisor Evaluation”. Click on the action item to initiate the supervisor evaluation. The supervisor will evaluate employee performance based on Goals and Job Duties/Competencies previously established.
Supervisor Evaluation Tabs

The supervisor will complete the Individual Goals tab, the Job Duties & Competencies tab and the Next Evaluation’s Goals tab. Instructions are provided in the blue area at the top of the page.
The supervisor will enter a rating and comment for each established individual goal.

Select “Save Draft” to review or edit information before finalizing or “Save & Continue” to proceed to the Job Duties tab.

When completing evaluations, supervisors are encouraged to review the self-evaluation, progress notes and any collected multi-rater feedback to aid in the evaluation process.
On the Job Duties tab, the supervisor will repeat the same action (enter a required rating and comment if desired for each job duty). At the end of the page, the supervisor is required to enter overall comments before selecting “Save & Continue”. The supervisor may select “Save Draft” to review or edit information before finalizing.
The supervisor will enter goals for next year’s evaluation. Click “Add Entry” to add additional goals as needed.

Click Complete to continue.
Score Review

Upon completion of the tabs on the previous slides, the message “The Supervisor Evaluation has been marked as completed” will appear as seen below in green. The supervisor should follow the instructions in blue, then click Acknowledge after the review meeting or they may click the Return button to make any necessary modifications.
Step 6: Supervisor Meets with Employee & Finalize Rating

If the supervisor was not able to complete all of steps at one time on the previous slide, they will have an action item on their home page “Supervisor Meets with Employee and Finalize Rating”.

UNT SYSTEM

Welcome to the Employee Portal,

Your Action Items

Start typing to search

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNT 2022 Staff Performance Evaluation Program for T2</td>
<td>Supervisor Meets with Employee and Finalize Rating</td>
</tr>
</tbody>
</table>

Step 7: Employee Acknowledges Evaluation

The employee signs in to the performance home page where they can view their Action Items. The employee will click their action item to review and acknowledge.
The employee will then review the evaluation results for individual goals and job duties, the overall rating and comments as well as their goals for the next year. Upon completion, the employee will click “Acknowledge” on the bottom of the page to acknowledge receipt.
Appendix
UNT Performance Rating Scale

5 –Highly Accomplished –Performance consistently and significantly exceeds established objectives; achieves significant contributions well beyond normal job requirements. Performance at this level is unique and rarely attained.

4 –Exceeds Requirements –Performance exceeds established objectives on a regular basis; exhibits a degree of excellence in accomplishing individual and department goals beyond the normal job requirements.

3 –Proficient/Meets Requirements –Performance meets established objectives and fully completes normal job requirements.

2 –Developing/Needs Improvement –Performance of established objectives is inconsistent; meets some of the minimum requirements of the position, but needs to improve performance in other areas.

1 –Unsatisfactory -Performance of established objectives and/or behaviors is deficient; rarely meets established objectives and/or behaviors, consistently fails to meet normal job requirements.

Please note that any score other than a 3 on an individual goal or job duty requires comments/justification. If an employee receives an overall score of 1 –1.4, please meet with Campus HR before conducting employee meeting.
Key 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.
- Goals and job duties are equally weighted 50/50.
E-mail Notifications

- 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 performance system.
- System generated e-mails will only be sent to individuals with action items. An individual should receive 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 and Resources

• HR Performance Management
  • System issues: log-in, employees not listed, navigation issues, re-open a task
  • Email: Jayne.Colavecchia@untsystem.edu or Aidee.Vaidya@untsystem.edu

• UNT Campus HR Team
  • Setting goals, performance concerns, discussions about unsatisfactory ratings
  • Email: HRAdministration@untsystem.edu
  • Phone: 940-565-2281

• Performance Management Web Page
  https://hr.untsystem.edu/performance-management