



# Performance Management User Guide

UNT

FY 2022

rev. 11/10/21



## 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

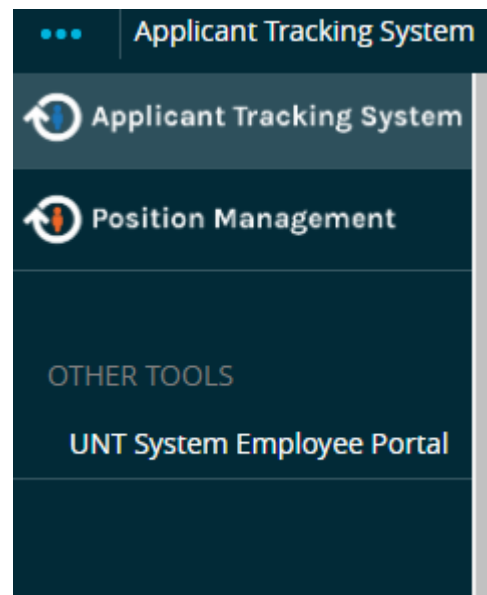
- Via employee portal login: <https://my.untsystem.edu>
  - Select the tile for Staff Performance Evaluations
- All supervisors and employees can access system but not everyone will have action items at the same time.



## Also access via PeopleAdmin



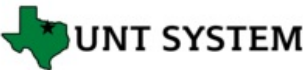
The employee portal can also be accessed through the PeopleAdmin System at <https://jobs.untsystem.edu/hr> by clicking on the three dots in the top left corner of the page and then selecting "UNT System Employee Portal"





# Navigation

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



Go to UNT System HR Site

PeopleAdmin

Home 2 Performance Progress Notes

Hello, John Log Out

Welcome to the Employee Portal, John

My Reviews

My Employees' Reviews

### Your Action Items

Start typing to search

Item	Description	Due Date	Status
<a href="#">UNT 2021 Staff Performance Evaluation Program for Emily</a>	Supervisor Creates Plan	2021-03-31 Due in 2 months	Upcoming
<a href="#">UNT 2021 Staff Performance Evaluation Program for Julie</a>	Supervisor Creates Plan	2021-03-31 Due in 2 months	Upcoming

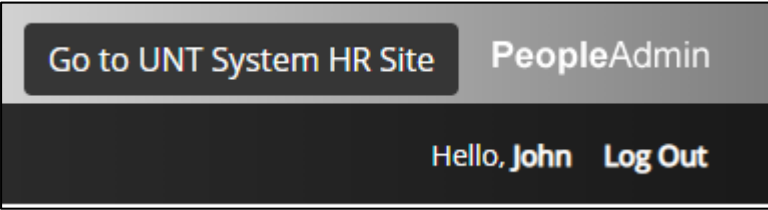
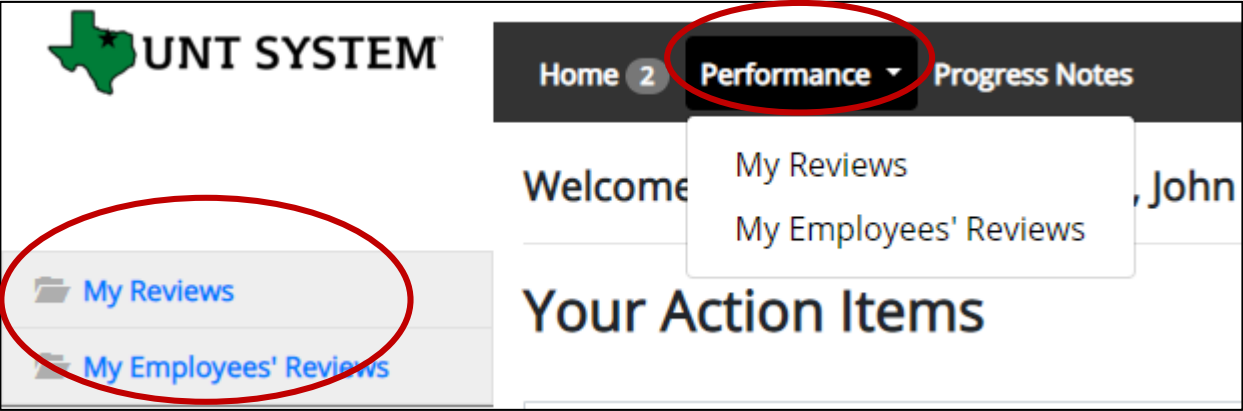
Showing 1 to 2 of 2 entries



# Navigation (cont.)

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.





## Supervisor Dashboard View

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 2<sup>nd</sup> level supervisors to drill down to view their entire organization and is also used to select previous year programs.

Go to UNT System HR Site

Home 2 Performance Progress Notes

Reviews Dashboard

Reset Program: None Employee Name Group by: Program Advanced

All Reviews 46 Not Started 0 In Process 23 Complete 23 Overdue 0 Disputed 0

Last Name	First Name	Anniversary Date	Progress	Program
UNT 2022 Staff Performance Evaluation Program (ml version) 23				
W		2006-07-01	0/7 1	UNT 2022 Staff Performance Evaluation Program
D		2003-09-01	0/7 1	UNT 2022 Staff Performance Evaluation Program
R		2020-02-18	0/7 1	UNT 2022 Staff Performance Evaluation Program



# 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.

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

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

Hello, Mike [Lo](#)

[My Reviews](#)

[My Employees' Reviews](#)

Reviews Dashboard

Reset

Program: 

None

Employee Name

Group by: 

Program

Advanced

Reporting Org Unit: 

None

Supervisor: 

None

Program Status: 

Active

All Reviews 46

Not Started 0

In Process 23

Complete 23

Overdue 0

Disputed 0

UNT

8





# Progress Notes Feature

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.



# Co-Reviewer Feature

Emily

Supervisor: John

Position Description: [Registrar Coordinator](#)

Department: Univ of North Texas - Denton

Overview

Plan

Supervisor Evaluation

Self Evaluation

Multi-rater Feedback

History

My Reviews

My Employees' Reviews

Plan for Emily

Actions

Instructions:

Tab 1 - Individual Goals:

- Meet with your employee to establish performance goals for the review period.

- Enter the established goals in the space(s) below, it is acceptable to list more than one related goal in each field, designate each by adding numbers (i.e. 1, 2, 3) or by using a - or \* at the beginning of each goal.

- Select "Add Entry" to add additional goals.

- Select "Save Draft" if you wish to review or edit the information before finalizing.

- Once you have entered all goals, select "Save and Continue".

Tab 2 - Job Duties & Competencies:

- Scroll down the page to view the Job Duties & Competencies for the position.

- For instructions on how to update and/or enter job duties, please use the Performance Management link below.

UNT 2021 Staff Performance Evaluation Program

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 07/01/20 to -

Last Updated: November 18, 2020 04:42

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

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”

Jayne Colavecchia

Supervisor: Melinda Lilly

Position Description: HR Consultant I

Department: UNT System Administration

Overview

Plan

Supervisor Evaluation

Self Evaluation

Multi-rater Feedback ▾

+ Invite Multi-rater

Approvals & Acknowledgements

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

Select Multi Raters

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

kareem

crodale

Username

<input checked="" type="checkbox"/>	Name	Login	Department	Supervisor
<input checked="" type="checkbox"/>	Kareem Cro	4	SYS	Melinda Lilly

Cancel Save

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”.

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

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



# Attachments Feature

Tab 2 - Job Duties & Competencies:

- If you would like to add attachments, please select the "Attachments" link.
- Scroll down the page to review all Job Duties.
- Review the rating table at the bottom of the page to understand the values for each rating score.
- Select the applicable overall performance rating for this review period and insert comments reflecting overall performance related to all job duties.
- Once overall comments have been entered, select "Complete" to submit your self-evaluation to your supervisor.

Individual Goals

Job Duties & Competencies

Review all Job Duties and Competencies (where applicable). Scroll to the bottom of the page and select an appropriate rating using the rating scale or by entering the value in the box at the end of the rating scale. Enter any optional comments to provide justification for the selected rating.

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

Job Duties

Attachments 0

Check spelling

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.



# Print Feature

The employee can **print the evaluation** by selecting “Print” on the top right corner of the “Employee Acknowledges Evaluation” page.

Stacie

Supervisor: Dorc

Position Description: HR Representative I

Department: UNT System Administration

Overview

Plan

Supervisor Evaluation

Self Evaluation

Approvals & Acknowledgements

My Reviews

Home 2 Performance Progress Notes 1

Hello, Stacie

Supervisor Evaluation for St

Instructions: Review the evaluation results and next year's goals. 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.

Individual Goals

For each Individual Goal listed, select the appropriate rating on the rating scale or enter the rating value in the box at the end of the rating scale. If rating selected is other than 3 - Proficient/Meets Requirements, enter comments providing justification for the selected rating.

Goal:

goal 1

Rating

3.0

Comments

comments

Actions

Print

Acknowledge

UNT 2021 Staff Performance Evaluation

Program Status: Open

Overall Rating: 3.4

Evaluation Type: Annual

Program Timeframe: 07/0

Last Updated: March 08, 2021 11:40

Last Completed Step: Supervisor Meets with Employee



## Step 1: Supervisor Reviews/Creates Plan (Individual Goals Tab)

• Individual Goals • Job Duties & Competencies

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

### Individual Goals

\* Goal

...cipate in new and or revised DSA Diversity and Inclusion Plans that will be continuously updated and completed by M  
These initiatives will either be in-person or scheduled mandatory sessions to include pre-defined group trainings and those offered

☐ Remove Entry?

- 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.

Add Entry

Save Draft Save & Continue



## Step 1: Supervisor Reviews/Creates Plan (cont.) (Job Duties/Competencies Tab)

• [Individual Goals](#) • **Job Duties & Competencies**

### Job Duties

Refresh Job Duties from Union Maint & Ops Manager Apply

Review the listed job duties, which are automatically populated from Position Management. Job duties can be modified in the Position Management Module. If updates to job duties are made, please select the relevant Position Description for the "Refresh Job Duties from" drop down menu, and then click "Apply" to display the updated job duties.

Description of Job Duty
Oversee daily operations of the University Union to ensure policies and procedures are followed; inspections are scheduled and completed; and action plans result in

Save Draft Complete

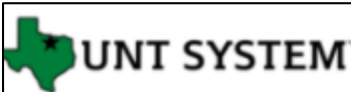
- Review job duties and select "Complete" to finalize the "Supervisor Reviews Plan" step
- Click "Save as Draft" in order to save the plan and return to complete it at a later time.

**\*Note:** Click *Apply* to refresh any job duties that may have been updated in the position description.



# Step 2: Employee Acknowledge Plan

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.



[Home](#) **5** [Performance](#) [Progress Notes](#)

Welcome to the Employee Portal, R

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

Your Action Items

Start typing to search

Item	Description
UNT 2022 Staff Performance Evaluation Program for Rick	Employee Acknowledges Plan





## 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.

Home 2 Performance **Progress Notes**

**Plan** for Rick

See page 10 of this guide for details on the Progress Notes feature.

**Instructions:**

- Meet with employee to review progress toward goals and job duties/competencies.
- Enter comments to provide feedback related to mid-year progress.
- The Progress Notes feature may also be utilized to capture additional comments and to add related attachments.
- Select "Acknowledge" once the Mid-Year Check In is complete.



## Step 4: Employee Self Evaluation (optional)

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.

• Individual Goals • Job Duties & Competencies

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

### Individual Goals

Goal:

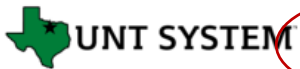
Work on unofficial committee that is in the beginning

Comments



# 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.



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

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

[My Reviews](#)

[My Employees' Reviews](#)

Welcome to the Employee Portal, John

### Your Action Items

Start typing to search

Item	Description		
<a href="#">UNT 2021 Staff Performance Evaluation Program for Emily</a>	<b>Supervisor Evaluation</b>	2021-02-01 Due in 5 days	Upcoming
<a href="#">UNT 2021 Staff Performance Evaluation Program for Julie</a>	Supervisor Creates Plan	2021-03-31 Due in 2 months	Upcoming







# Supervisor Evaluation – Individual Goals Tab

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.

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.
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.

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

### Individual Goals

For each Individual Goal listed, select the appropriate rating on the rating scale or enter the rating value in the box at the end of the rating scale. If rating selected is other than 3 - Proficient/Meets Requirements, enter comments providing justification for the selected rating.

Goal:

goal 1

\* Rating

1 2 3 4 5

Comments

Goal:

goal 2 test

\* Rating

1 2 3 4 5

Comments

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



# Supervisor Evaluation – Job Duties Tab

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.



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.
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.

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

**Job Duties**

For each Job Duty listed, select the appropriate rating on the rating scale or enter the rating value in the box at the end of the rating scale. If rating selected is other than 3 - Proficient/Meets Requirements, enter comments providing justification for the selected rating.

Description of Job Duty:

this is job duty 1

\* Rating

1 2 3 4 5

Comments

Description of Job Duty:

this is job duty 2

\* Rating

1 2 3 4 5

Comments



# Supervisor Evaluation - Next Evaluation's Goals Tab

The supervisor will enter goals for next year's evaluation. Click "Add Entry" to add additional goals as needed.

Click Complete to continue.

Individual Goals

Job Duties & Competencies

Next Evaluation's Goals

Attachments 0

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

Check spelling

Next Evaluation's Goals

Please enter goals for next year's evaluation. Click on "Add Entry" to add additional goals as needed. Click on "Remove Entry" if any goals need to be deleted. There must be at least one entry for this section.

\* Goal

Goal 1

☐ Remove Entry?

Add Entry

Save Draft

Complete



# 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.

Home 4 Performance ▾ Progress Notes

Hello, Brandi Log Out

The Supervisor Evaluation has been marked as completed.

Supervisor Evaluation for Tara L. [REDACTED]

Actions ▾

Instructions:

- Review the evaluation document and ratings to confirm the entered data and resulting score. The overall rating can be located in the right-hand section of the page.
- If revision is needed, select "Return for Revision".
- Schedule time to meet and discuss the evaluation with the employee. If the overall evaluation score is Unsatisfactory (1.0 - 1.4), please consult with Campus HR before meeting with the employee.
- Once the review meeting is complete, select "Acknowledge".

UNT 2022 Staff Performance Evaluation Program

Review Status: Open

Overall Rating: 3.79

Evaluation Type: Annual

Program Timeframe: 10/01/21 to -

Return

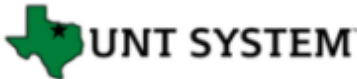
Acknowledge





# 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".



Home 4 Performance Progress Notes

Welcome to the Employee Portal,

My Reviews

My Employees' Reviews

Your Action Items

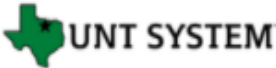
Start typing to search

Item	Description
UNT 2022 Staff Performance Evaluation Program for Ta	Supervisor Meets with Employee and Finalize Rating



# 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.



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

Welcome to the Employee Portal, Stac

[My Reviews](#)

### Your Action Items

Start typing to search

Item	Description	Due Date
<a href="#">UNT 2021 Staff Performance Evaluation Program for [redacted]</a>	Self Evaluation	2021-04-30 Due in about 2 months
<a href="#">UNT 2021 Staff Performance Evaluation Program for [redacted]</a>	Employee Acknowledgment of Supervisor Evaluation	2021-05-31 Due in 3 months

Showing 1 to 2 of 2 entries



# Employee Acknowledges Evaluation (cont.)

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.

Home

Performance

Progress Notes

Go to UNT System HR Site

PeopleAdmin

Supervisor Evaluation for St

Instructions: Review the evaluation results and next year's goals. 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.

Actions

UNT 2021 Staff Performance Evaluation Program

Review Status: Open

Overall Rating: 3.4

Evaluation Type: Annual

Program Timeframe: 07/01/20 to -

Last Updated: March 08, 2021 11:40

Last Completed Step: Supervisor Meets with Employee

Supervisor: Dr

Position Description: HR Representative I

Department: UNT System Administration

Overview

Plan

Supervisor Evaluation

Self Evaluation

Approvals & Acknowledgements

My Reviews

Individual Goals

For each Individual Goal listed, select the appropriate rating on the rating scale or enter the rating value in the box at the end of the rating scale. If rating selected is other than 3 - Proficient/Meets Requirements, enter comments providing justification for the selected rating.

Goal:

goal 1

Rating

3.0

Comments

comments

Goal:

goal 2 test

Acknowledge



## 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](mailto:Jayne.Colavecchia@untsystem.edu) or [Aidee.Vaidya@untsystem.edu](mailto:Aidee.Vaidya@untsystem.edu)
- UNT Campus HR Team
  - Setting goals, performance concerns, discussions about unsatisfactory ratings
  - Email: [HRAdministration@untsystem.edu](mailto:HRAdministration@untsystem.edu)
  - Phone: 940-565-2281
- Performance Management Web Page  
<https://hr.untsystem.edu/performance-management>