PeopleAdmin Performance Management User Guide

UNT FY 2024 Performance Evaluation Program
How to Access Performance Module

• myhr.unt.edu

• Log-in with EUID and Password
You may also access the employee portal through the PeopleAdmin System at [https://jobs.untsystem.edu/hr](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.
The home page provides a list of items that require action. This will include tasks related to your own evaluation and for supervisors, this will also include tasks for those you supervise.
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.
Clicking on the My Employee’s Reviews link takes you to the Reviews Dashboard which lists all employees, along with what stage of the employee evaluation they are currently on. The available pre-filtered tabs are:

1. All Reviews
2. Not Started
3. In Process
4. Complete
5. Overdue

*Please note that the Disputed tab will not be used*

Supervisors may also use the available search filters in order to more quickly locate employee evaluations.
To begin the performance process, the supervisor will navigate to the available action items list on the performance management home page.
The supervisor meets with the employee to review progress since the beginning of the performance period, provide feedback and make any adjustments to goals or job duties. Utilize the progress notes feature (see appendix) to document additional details. Click Complete to indicate that the first performance check in is complete and these are the agreed upon goals and job duties for the review period.
The employee accesses the task listed on their home page in the performance management system. They will review goals, job duties and progress notes, add comments and click the acknowledge button.
Performance Check-Ins

Supervisors are required to have periodic meetings with employees to provide feedback and review progress towards achieving goals and job duties.

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 page. The supervisor will select the relevant link for the specific employee.
Supervisors will review goals and job duties and utilize the progress notes feature (see appendix) to document progress. Once the supervisor has met with the employee and reviewed progress, they will select the acknowledge button to indicate that the check in has taken place. Comments may also be entered into the comment box.
Self-Evaluation

After the last performance check-in has concluded, the next step is for the employee to complete a self-evaluation. The self evaluation is optional. Managers will notify staff if they require a self-evaluation.

The employee will select the relevant task link from the list of actions to complete the self evaluation.
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 multi-rater feedback to aid in the evaluation process.
The supervisor will select ratings and enter comments as required for individual goals and job duties on the respective tabs. They will click the complete button to move to the next step.
After clicking the complete button, a rating will display at the top of the page. If the supervisor needs to make revisions, they can click the actions button, then return. Upon completion the supervisor will then meet with the employee.
The supervisor will have an action item listed on their home page to meet with the employee and finalize the rating. Click the action item for the specific employee.
Review Meeting (cont.)

The supervisor will conduct the review meeting. Click the return button if revisions are needed. Click the acknowledge button once the meeting is held to complete this step in the process.
Once the review meeting has concluded, the employee will select the final task on their home page and click the acknowledge button. Employees may enter comments if desired.
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.
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.
Additional Reviewers

• The system allows for feedback from other UNT Enterprise 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 Enterprise employees (customers, peers, etc.) on the employee’s performance. The multi-rater has no access to read or edit the employee’s evaluation.
Multi-Rater Feedback

A supervisor can request performance feedback from other UNT Enterprise 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.

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 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.
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 button or they may select the complete button to conclude the multi-rater feedback.
To view the Multi-Rater feedback, the supervisor will select the employee’s name from the left menu under the Multi-Rater feedback drop-down list.

The supervisor will then be able to see any comments made by the multi-Rater.

Multi-rater comments are only visible to the supervisor and the multi-rater, employees are not able to access these comments.
Co-Reviewer

Adding a co-reviewer allows the supervisor to identify another individual who can perform all the same evaluation steps as the supervisor. This function can be utilized if another reviewer is to have full feedback capabilities to the employee’s evaluation. The co-reviewer has the ability to perform all the same steps as the supervisor.

To add a co-reviewer, the supervisor will click on the “Add Co-reviewer” link.

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.

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.
Rating Structure

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.

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.

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

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.
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 notes button.

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

Supporting documents may also be added by clicking the attachment button.

Click the create button to add the progress note.
Progress Notes (cont.)

Clicking on the progress notes link also allows you to view any progress note(s) created by or shared with the individual.
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 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
  - Technical assistance, i.e. navigation, re-open tasks
  - Email: Jayne.Colavecchia@ untsystem.edu or Aidee.Vaidya@ untsystem.edu
- UNT HR Team
  - Guidance related to goal setting, ratings or performance concerns
  - Email: HRA d ministration@ untsystem.edu
  - Phone: 940-565-2281