



UNT PeopleAdmin Performance Management Mid-Year Assessment

User Guide
September 2020



Who Will Utilize the People Admin Performance Management Tool?

- The PeopleAdmin (PA) performance management tool will be 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



Accessing the Performance Module

- Via employee portal link: <https://my.untsystem.edu>
 - Go to the PeopleAdmin section
 - Select the link for Staff Performance Evaluation
- Log-in with EUID and Password
- All supervisors and employees can access system



Access via Employee Portal

<https://my.untsystem.edu>

The screenshot displays the UNT SYSTEM Employee Portal interface. At the top left is the UNT SYSTEM logo. To its right are navigation buttons for Jobs, Well-Being, Forms, and Directory. Below these are tabs for Human Resources, Reports, and Student & Faculty tabs moved. The main content area is divided into three columns. The left column contains a sidebar with links for Email, Cypress, I-9 Form, Privacy Elections, Human Resources Reporting, Self Service Help, Personal Information, Payroll & Compensation, Manager Self Service, Time Reporting, and eLeave. The middle column features three main sections: Time Reporting (with links for Approve Time, Time & Labor WorkCenter, and My Timesheet), eLeave (with links for Request Leave, Approve Leave Requests, and Display Leave Requests), and ePAR: Payroll Action Request. The right column contains Learning & Development Portals (with links for UNT World Learning and UNT Bridge) and PeopleAdmin (with links for Applicant Tracking & Position Management and Staff Performance Evaluation). A red circle highlights the 'Staff Performance Evaluation' link in the PeopleAdmin section.



Access via PeopleAdmin

Applicant Tracking System

Welcome, Abby Ogenche [My Profile](#) [Help](#) [logout](#)

User Group:
Compensation

Home Postings Applicants Hiring Proposals Shortcuts

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"

Performance Management

- Applicant Tracking System
- Position Management
- Performance Management
- OTHER TOOLS
- Admin
- UNT System Employee Portal



Navigation

The screenshot shows the top navigation bar of the UNT System Employee Portal. The 'Home' link is circled in red. Below the navigation bar, the user is greeted with 'Welcome to the Employee Portal, Jon Rascon'. On the left, there are two menu items: '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:

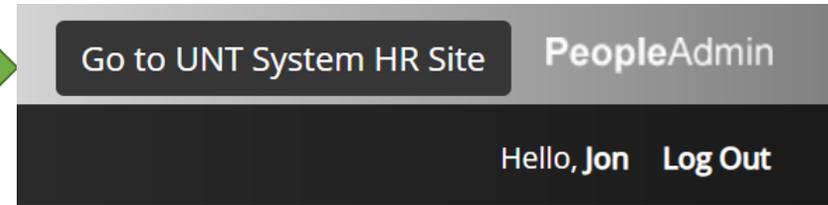
Item	Description	Due Date	Status
UNT System Admin (Multi-rater test) (Copy) for Ashley Barraza	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming
UNT System Admin (Multi-rater test) (Copy) for Craig Carter	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming
UNT System Admin (Multi-rater test) (Copy) for Denise Harpool	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming
UNT System Admin (Multi-rater test) (Copy) for James Doss	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming
UNT System Admin (Multi-rater test) (Copy) for Jill Roys	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming
UNT System Admin (Multi-rater test) (Copy) for Laura Scott	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming
UNT System Admin (Multi-rater test) (Copy) for Monica Madrid	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming
UNT System Admin (Multi-rater test) (Copy) for Rebecca Laduke	Supervisor Creates Plan	2020-07-03 Due in about 1 month	Upcoming

By clicking “Home” in the top banner at any time, you can get to your action items. This screen displays items that you need to take action on.

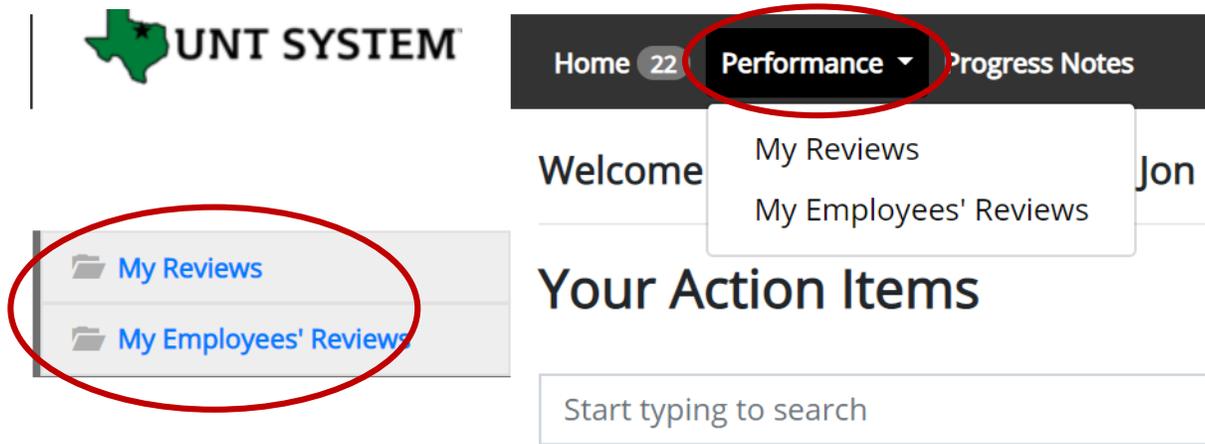


Navigation (cont.)

The supervisor can choose to view their own review(s) 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” link takes the user back to PeopleAdmin





Page Instructions

Each page in the Performance Management System contains an Instructions section that provides important navigation and other guidance for completing the steps of the evaluation process.

The screenshot displays the 'Supervisor Evaluation' page for Darryllynn Williams. The breadcrumb trail at the top reads 'Home 22 Performance ▾ Progress Notes 5'. The user is identified as 'Hello, Melinda'. The page title is 'Supervisor Evaluation for Darryllynn Williams'. A blue 'Actions' button is visible in the top right corner. The 'Instructions' section, highlighted by a green arrow, contains the following list of instructions:

- Complete each field on the form below to provide the employee feedback on their accomplishments, performance and development.
- Select the appropriate value for the employee's progress assessment.
- Utilize the "Attachments" link to attach any supporting information.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- Select Complete when all actions have been completed.

On the right side of the page, there is a sidebar with the following information:

- UNT Fall 2021 Performance Assessment (
- Review Status: C
- Evaluation Type:
- Program Timeframe to -
- Last Updated: All 11:38
- Co-reviewer: Adc



Co-Reviewer Feature

UNT SYSTEM Home 22 Performance ▾ Progress Notes 5 Hello, Melinda Log Out

Darryllynn Williams Supervisor Evaluation for Darryllynn Williams Actions ▾

Supervisor: Melinda Lilly
Position Description: HR Coordinator II
Department: UNT System Administration

Overview
Supervisor Evaluation
History
My Reviews
My Employees' Reviews
My Multi Rater Feedback

Instructions:

- Complete each field on the form below to provide the employee feedback on their accomplishments, performance and development.
- Select the appropriate value for the employee's progress assessment.
- Utilize the "Attachments" link to attach any supporting information.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- Select Complete when all actions have been completed.

Accomplishments, Feedback and Development Attachments 0

Required fields are indicated with an asterisk (*). Check spelling

Accomplishments, Feedback and Development Opportunities

UNT Fall 2020 Mid-Year Performance Assessment (V3)
Review Status: Open
Evaluation Type: Annual
Program Timeframe: 07/01/20 to -
Last Updated: August 17, 2020 11:38
Co-reviewer: [Add Co-reviewer](#)

Note: Multi-rater will not be used for Mid-Year Assessments

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 same 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 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. 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. The supervisor or co-reviewer may also add attachments by selecting the attachment link.



Progress Notes Feature

Progress notes allow **both** the employee and supervisor to document achievements, kudos or coaching meetings throughout the year as well as during the evaluation process.

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 notes with the employee or supervisor. Select “create” when complete



Beginning the Mid-Year Assessment

Going to "Home", a Supervisor can create and/or access reviews for all employees in their area of responsibility by selecting the link with the employee's name. Search by name and click on the action item listed for that employee.



Home 22 Performance ▾ Progress Notes 5

Hello, Melinda L

Welcome to the Employee Portal, Melinda Lilly

Your Action Items

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

Item	Description	Due Date	Status
UNT Fall 2020 Mid-Year Performance Assessment (V3) for Darrylynn Williams	Supervisor Evaluation	2020-11-17 Due in 2 months	Upcoming





Mid-Year Assessment Template

- The supervisor or co-reviewer will insert comments in each section of the mid-year template. When completing the mid-year assessment supervisors are encouraged to communicate with employees to gather accomplishments to document in the accomplishments section of the form.

Accomplishments, Feedback and Development

Required fields are indicated with an asterisk (*).

Accomplishments, Feedback and Development Opportunities

* Accomplishments - List primary accomplishments achieved by the employee

* Feedback - Provide feedback on overall performance.

* Development - Provide feedback on opportunities for growth and improvement

Mid-Year Assessment

* Mid-Year Progress Assessment - Select one from drop-down menu

Please select



Adding Attachments

Supervisor Evaluation for Darrylynn Williams

Actions ▾

Instructions:

- Complete each field on the form below to provide the employee feedback on their accomplishments, performance and development.
- Select the appropriate value for the employee's progress assessment.
- Utilize the "Attachments" link to attach any supporting information.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- Select Complete when all actions have been completed.

Accomplishments, Feedback and Development

Attachments 0

Required fields are indicated with an asterisk (*).

 [Check spelling](#)

Accomplishments, Feedback and Development Opportunities

* Accomplishments - List primary accomplishments achieved by the employee

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.



Mid-Year Rating

Accomplishments, Feedback and Development Opportunities

* Accomplishments - List primary accomplishments achieved by the employee

- Compensation project
- Performance project

* Feedback - Provide feedback on overall performance.

Great job on compensation project!

* Development - Provide feedback on opportunities for growth and improvement

Attend additional training for performance project.

Mid-Year Assessment

* Mid-Year Progress Assessment - Select one from drop-down menu

Please select
Please select
Progress Needed
On Track

Save Draft Complete

At the bottom of the page, the supervisor will select a mid-year rating of “On Track” or “Progress Needed”.

If a rating of “Progress Needed” is being recommended, click Save Draft and then contact Campus HR to review the recommendation prior to clicking Complete. After reviewing with HR, if the rating of “Progress Needed” is still appropriate, click Complete.

Once you click Complete, the employee will have access to the review information.



Employee Acknowledges Evaluation



Home 1 Performance ▾ Progress Notes Hello, Darrylynn L

Welcome to the Employee Portal, Darrylynn Williams

[My Reviews](#)

Your Action Items

Item	Description	Due Date	Status
UNT Fall 2020 Mid-Year Performance Assessment (V3) for Darrylynn Williams	Employee Acknowledge Feedback	2020-11-17 Due in 2 months	Upcoming

The employee can sign in to the Performance Module where they can view their Action Items, My Reviews and Progress Notes. The employee will click their action item, review the mid-year results and comments and click “Acknowledge” on the bottom of the page to acknowledge receipt of the feedback.



Supervisor Dashboard

Home 22 Performance ▾ Progress Notes 5 Hello, Melinda Log Out

Reviews Dashboard

Reset Program: None ▾ Employee Name Group by: Program ▾

All Reviews 23 Not Started 0 In Process 22 Complete 1 Overdue 11 Disputed 0

Last Name	First Name	Anniversary Date	Progress	Program	Score
UNT Cabinet Reports Performance Evaluation Program 3					
Crosdale	Kareem	2019-05-13	0/2 <input type="checkbox"/>	UNT Cabinet Reports Performance Evaluation Program	N/A
Ogenche	Abby	2019-12-01	0/2 <input type="checkbox"/>	UNT Cabinet Reports Performance Evaluation Program	N/A
Colavecchia	Jayne	2020-01-29	0/2 <input type="checkbox"/>	UNT Cabinet Reports Performance Evaluation Program	N/A
UNT Fall 2020 Mid-Year Performance Assessment (V3) 4					
Colavecchia	Jayne	2020-01-29	✓ <input checked="" type="checkbox"/> <input type="checkbox"/>	UNT Fall 2020 Mid-Year Performance Assessment (V3)	On Track
Williams	Darrylynn	2018-03-26	0/2 <input type="checkbox"/>	UNT Fall 2020 Mid-Year Performance Assessment (V3)	Unrated
Crosdale	Kareem	2019-05-13	0/2 <input type="checkbox"/>	UNT Fall 2020 Mid-Year Performance Assessment (V3)	Unrated

The dashboard provides an at-a-glance view of the evaluation process status. As steps are completed they change to green. View tabs for In Process, Complete or Overdue. The Disputed tab is not utilized for UNT performance.

The Advanced button allows 2nd level supervisors to drill down to view their entire organization.



Appendix



Steps of UNT 2020 Mid-Year Assessment

- **Supervisor Evaluation** – supervisor documents primary accomplishments and provides feedback on performance as well as opportunities for growth and improvement.
- **Employee Acknowledges Feedback** - employee acknowledges receipt of feedback
- **Eligibility** - Any employee starting on or before 7/31/2020
- **Program Dates** - 9/15 – 11/17
- **Evaluation period** - Provide performance feedback and reset goals since the 2019 annual evaluation, particularly since March 1st and the impact of the pandemic.



UNT Mid-Year Rating Structure

- **On Track**– Performance is on track to meet established goals and the employee fully completes job requirements.
- **Progress Needed**– Performance is inconsistent; meets some of the job requirements and goals of the position but needs to improve performance in other areas.

If an employee receives an overall score of “Progress Needed” please contact your Campus HR representative before submitting feedback to the employee.



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 will make up 60% of the evaluation score.
- Job Duties (or competencies if utilized) will make up 40% of the evaluation score.



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 Compensation and Performance Management Team
 - System issues: log-in, employees not listed, navigation issues, re-open a task
 - Email: HRComp@untsystem.edu
 - Phone: 1-855-878-7650, option 6
- UNT Campus HR Team
 - Performance management concerns, discussion about unsatisfactory ratings
 - Email: HRAdministration@untsystem.edu
 - Phone: 940-565-2281
- Performance Management Web Page <https://hr.untsystem.edu/performance-management>
- [UNT World Learning](#)
 - For recorded training, click on the *Learning Library* and scroll down to the Human Resources section. Search for institution specific training.