



Performance Management User Guide

UNT System FY21

January 2021



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



How to Access Performance Module (cont.)

Applicant Tracking System

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

User Group:
Compensation

Home Postings Applicants Hiring Proposals Shortcuts

The employee portal can be accessed through the PeopleAdmin System by clicking on the three dots in the top left corner of the page and then selecting "UNT System Employee Portal"

Applicant Tracking System

Applicant Tracking System

Position Management

OTHER TOOLS

UNT System Employee Portal



Navigation

The home screen displays a list of items that require action. This includes tasks related to a supervisor's own evaluation and tasks related to the employees supervised.

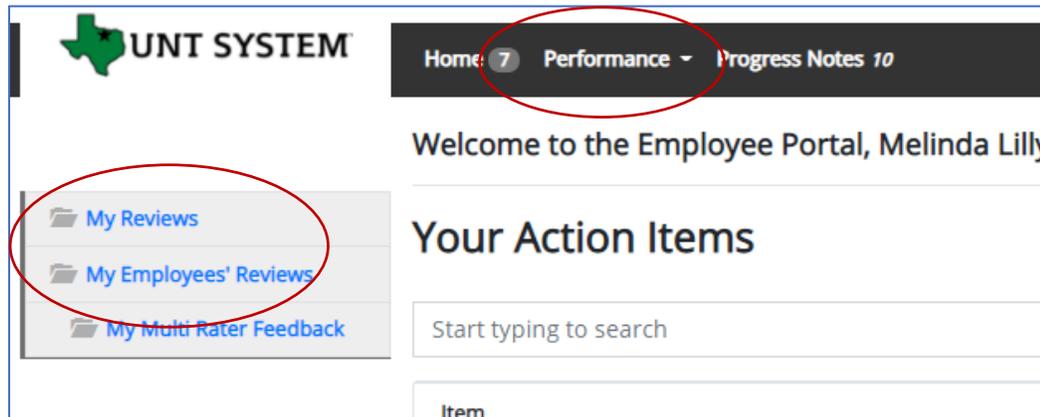
The screenshot shows the UNT System Employee Portal interface. At the top left is the UNT SYSTEM logo. To its right is a dark navigation bar with three tabs: 'Home 7', 'Performance', and 'Progress Notes 10'. The 'Home 7' tab is circled in red. Below the navigation bar, the user is greeted with 'Welcome to the Employee Portal, Melinda Lilly'. On the left side, there is a sidebar menu with three items: 'My Reviews', 'My Employees' Reviews', and 'My Multi Rater Feedback'. The main content area is titled 'Your Action Items' and contains a search box with the placeholder text 'Start typing to search'. Below the search box is a table with two columns: 'Item' and 'Description'.

Item	Description
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Abby Ogenche	Mid-Year Check In
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christle O'Quinn	Mid-Year Check In
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Darryllynn Williams	Supervisor Creates Plan
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Dorothy Cummings	Supervisor Creates Plan

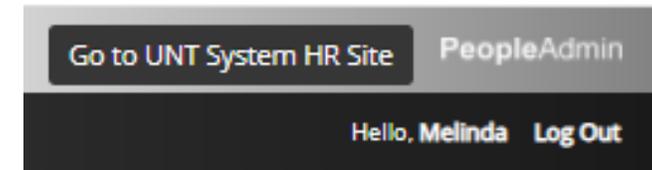


Navigation (cont.)

The supervisor can choose to view their own historical evaluations or the status of their employees reviews by either selecting “Performance” at the top of the page or 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





Evaluation Schedule FY21

1. Supervisor Creates Plan
2. Employee Acknowledges Plan
3. Mid-Year Check In
4. Self Evaluation
5. Supervisor Evaluation
6. Evaluation Review Meeting
7. Employee Acknowledges Evaluation



Progress Notes Feature

The screenshot shows the UNT System PeopleAdmin interface. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes 10'. The 'Progress Notes' link is circled in red. Below the navigation bar, there is a search bar and an 'Advanced' filter button. On the right side of the page, a blue button labeled 'Create Progress Note' is circled in red. The main content area shows a table with columns for Title, Shared, Program, Date, Type, Author, and Employee.

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

It is highly encouraged that supervisors add progress notes detailing review 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 by clicking “Attachments”

The screenshot shows the 'New Progress Note' form. It includes fields for Program (optional), Employee*, Step (optional), Type*, and Title*. The 'Share this Progress Note' checkbox is circled in red. There is also an 'Attachment' button and 'Create' and 'Cancel' buttons at the bottom.

There is an option to share the progress note with the employee or supervisor. Click “create” when complete.



Beginning the Review Process

Step 1: Once logged in to the employee portal, 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

The screenshot shows the UNT System Employee Portal interface. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes 10'. A user greeting 'Hello, Melinda' is visible. Below the navigation bar, a welcome message reads 'Welcome to the Employee Portal, Melinda Lilly'. The main section 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 columns: 'Item', 'Description', 'Due Date', and 'Status'. The table lists five pending reviews for various employees. A large green arrow points to the first row of the table.

Item	Description	Due Date	Status
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Abby Ogenche	Mid-Year Check In	2021-04-30 Due in 3 months	Upcoming
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christle O'Quinn	Mid-Year Check In	2021-04-30 Due in 3 months	Upcoming
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Darrylynn Williams	Supervisor Creates Plan	2021-01-29 Due in 5 days	Upcoming
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Dorothy Cummings	Supervisor Creates Plan	2021-01-29 Due in 5 days	Upcoming
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Jayne Colavecchia	Supervisor Creates Plan	2021-01-29 Due in 5 days	Upcoming



Beginning the Review Process (cont.)

The supervisor can also access and view the status of their employees' evaluations by clicking "My Employees' Reviews" on the left side of the page. To begin the evaluation, click on each employee's name and create a plan. Notice the column labeled "Progress". The progress steps change color when you go through each step. The color key is across the top bar. *Please note that the disputed tab is not in use for this program*

The screenshot shows the 'Reviews Dashboard' interface. On the left sidebar, 'My Employees' Reviews' is highlighted with a red circle and a green arrow points to it. The main content area features a navigation bar with 'Home 7', 'Performance', and 'Progress Notes 10'. Below this is a search and filter section with 'Reset', 'Program: None', 'Employee Name' search, 'Group by: Program', and 'Advanced' options. A progress summary bar shows: All Reviews (14), Not Started (0), In Process (7), Complete (7), Overdue (0), and Disputed (0). The table below has columns for Last Name, First Name, Anniversary Date, Progress, Program, and Score. The 'Progress' column is circled in red. The table title is 'UNT System Administration Non-Supervisor FY21 Performance Evaluation Program 7'.

Last Name	First Name	Anniversary Date	Progress	Program	Score
Colavecchia	Jayne	2020-01-29	0/7	UNT System Administration Non-Supervisor FY21 Performance Evaluation Program	Unrated
Ogenche	Abby	2019-12-01	3/8	UNT System Administration Non-Supervisor FY21 Performance Evaluation Program	Unrated
Fredrickson	Stacie	2019-04-15	0/7	UNT System Administration Non-Supervisor FY21 Performance Evaluation Program	Unrated
Crosdale	Kareem	2019-05-13	0/7	UNT System Administration Non-Supervisor FY21 Performance Evaluation Program	Unrated
Cummings	Dorothy	2012-05-07	0/7	UNT System Administration Non-Supervisor FY21 Performance Evaluation Program	Unrated
Williams	Darrylynn	2018-03-26	0/7	UNT System Administration Non-Supervisor FY21 Performance Evaluation Program	Unrated
O'Quinn	Christle	2013-06-17	3/9	UNT System Administration Non-Supervisor FY21 Performance Evaluation Program	Unrated



Supervisor Creates Plan

The Supervisor is now able to create a plan for the selected employee. Click “Supervisor Creates Plan” to start. Notice additional details on the left and right menus include links to select a multi-rater and co-reviewer. Multi-rater allows the supervisor to invite feedback from others. Adding a co-reviewer allows the supervisor to identify another individual who can perform all the same evaluation steps as the supervisor. Please go to slides 12 and 13 for more information on the multi-rater and co-reviewer features.

The screenshot displays the UNT System HR interface for a performance evaluation. The main content area shows a list of tasks for the employee Jayne Colavecchia, with the first task, 'Supervisor Creates Plan', highlighted by a green arrow. The left sidebar contains navigation options, with 'Multi-rater Feedback' circled in red. The right sidebar shows evaluation details, with the 'Add Co-reviewer' link also circled in red.

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Melinda Lilly Supervisor	2021-01-19		2021-01-29
2 Employee Acknowledges Plan	Jayne Colavecchia			2021-01-29
3 Mid-Year Check In	Melinda Lilly Supervisor	2021-01-01		2021-04-30
4 Self Evaluation	Jayne Colavecchia	2021-01-01		2021-10-29
5 Supervisor Evaluation	Melinda Lilly Supervisor	2021-01-01		2021-10-29
6 Supervisor Schedules Meeting with Employee	Melinda Lilly Supervisor			2021-10-29
7 Employee Acknowledges Evaluation	Jayne Colavecchia			2021-10-29



Co-Reviewer Feature

The screenshot displays the 'Supervisor Evaluation' page for Jayne Colavecchia. The page includes a navigation menu on the left with options like 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Multi-rater Feedback', and 'Approvals & Acknowledgements'. The main content area shows instructions for the evaluation process, including a 'Performance Review' tab and a 'Future Objectives' tab. A right sidebar provides details about the 'UNT System Administration Non-Supervisor FY21 Performance Evaluation Program', including the review status (Open), evaluation type (Annual), and program timeframe. A green arrow points to the 'Add Co-reviewer' link in the right sidebar, and another green arrow points to the 'Attachments' link at the bottom right of the main content area.

The supervisor can review multi-rater and co-reviewer feedback or the employee's self evaluation by selecting the links on the left of the page

The supervisor can add a co-reviewer during the evaluation process. This function 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 an employee 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 will be notified 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.



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.

<input checked="" type="checkbox"/>	Name	Login	Department	Supervisor
<input checked="" type="checkbox"/>	Kareem Crodale	11239664	SYS	Melinda Lilly

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 (*). [Check spelling](#)

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?



Supervisor Creates Plan (cont.)

Step 1: The Supervisor enters objective(s) for each section listed. Example text is included for non-supervisors and supervisors. Click “Save Draft” if additional changes are needed or “Complete” when the plan is completed by clicking the buttons at the bottom of the screen. Once completed, the employee will then access the plan for review and acknowledgement. Page instructions are found in the light blue section at the top of the page.

New this year!

Objectives may be identified as an individual objective by entering (I) before the objective, or a team objective by entering (T) before the objective.

The screenshot shows the 'Plan for Jayne Colavecchia' page. At the top, there are navigation links for 'Go to UNT System HR Site' and 'PeopleAdmin', and a user greeting 'Hello, Melinda Log Out'. The main content area is titled 'Plan for Jayne Colavecchia' and includes an 'Instructions' section with a light blue background. Below this is a 'Business Acumen' section with a detailed description. A text area for entering objectives is labeled '* Individual or Team Objective(s)'. A green arrow points to this text area. At the bottom right, there are two buttons: 'Save Draft' and 'Complete', which are circled in red. The left sidebar shows navigation options like 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Multi-rater Feedback', 'History', 'My Reviews', 'My Employees' Reviews', and 'My Multi Rater Feedback'.



Employee Acknowledges Plan

Home [?](#) Performance [-](#) Progress Notes [1](#)

Welcome to the Employee Portal, Jayne Colavecchia

Your Action Items

Start typing to search

Item	Description	Due Date
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christle O'Quinn	Complete Multi-Rater Evaluation	n/a
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Jayne Colavecchia	Employee Acknowledges Plan	2021-01-29 Due in 4 days

Showing 1 to 2 of 2 entries

Step 2: The employee logs in to PeopleAdmin/Performance Management to review the plan created by the Supervisor. The employee will have a related action item on the home page. To initiate this step, the employee clicks the “Employee Acknowledges Plan” item.

Individual or Team Objective(s)
objective 4

Building Coalitions
Actively seeks peers or stakeholders to facilitate an open exchange of opinion from diverse groups and strengthen internal and external support; solicits feedback for improvement and shares ideas for best practices; collaborates, explains, advocates, and expresses facts and ideas in a convincing manner and negotiates with individuals and groups internally and externally, as appropriate; develops a professional network with other organizations and identifies the internal and external politics that affect the work of the organization.

Individual or Team Objective(s)
objective 4

Develop Self
Maintains an openness to continuous learning, shows initiative to participate in or lead new initiatives; seeks opportunities to learn and develop skills through formal and informal training and mentoring.

Individual or Team Objective(s)
objective 5

Comment [Check spelling](#)

[Acknowledge](#)

After reviewing the plan, the employee can enter comments and then click on the “Acknowledge” button at the bottom of the screen.



Mid-Year Check In

Home 7 Performance - Progress Notes 10

Welcome to the Employee Portal, Melinda Lilly

Your Action Items

start typing to search

Item	Description
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Abby Ogenche	Mid-Year Check In
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christie O'Quinn	Mid-Year Check In

Step 3: The supervisor will login to complete the Mid-Year Check in with the employee. To initiate this step, select the desired employee listed on the home page and you will be taken to the next page to complete the Mid-Year Check In.

To complete this step, the supervisor will meet with the employee to review progress toward goals and objectives, enter a progress note to document the conversation, and then click “Complete” on the Mid-Year check in page.

Home 7 Performance - Progress Notes 10

Mid-Year Check In

Instructions:

- Meet with employee to review progress toward objectives.
- Add comments to Progress Notes before completing.
- Select Complete once the Mid-Year Check In is complete.

[Complete](#)



Employee Self Evaluation

Step 4: The employee completes a self evaluation of their performance related to their established objectives. Employees are notified by email of the due date. The action item appears on the home page. To initiate the self evaluation process, the employee will select the link on the home page for the Self Evaluation item.

Home 3 Performance ▾ Progress Notes 1

Welcome to the Employee Portal, Jayne Colavecchia

Your Action Items

Item	Description
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christle O'Quinn	Complete Multi-Rater Evaluation
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Jayne Colavecchia	Employee Acknowledges Evaluation
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Jayne Colavecchia	Self Evaluation



Employee Self Evaluation (cont.)

Home 3 Performance ▾ Progress Notes 1

Self Evaluation for Jayne Colavecchia

On the Self Evaluation screen, the employee will complete the required fields.



Performance Review

Required fields are indicated with an asterisk (*).

Business Acumen

Proficiently executes the functions of the job with accuracy and timeliness and in a manner that instills trust and accomplishes the organization's mission. Expands job knowledge and understanding of own work and work of others. Exhibits own responsibility in completing job tasks. Exhibits proactive customer support to internal and external customers. Identifies and removes roadblocks and initiates change. Understands the up and down-stream effects of inaccuracies or inefficiencies in own work. Troubleshoots and resolves issues. Effectively communicates and achieves outcomes. Uses technology to enhance processes and decision making.

Individual or Team Objective(s):

objective 1

* Comments

Results Driven

Achieves specific performance requirements expected of the employee during the appraisal period, focusing on measurable results from the strategic plan, departmental objectives, and measurable outputs and outcomes clearly aligned to organizational goals and objectives. The performance requirements must contain measurable results and quality indicators. The quality indicators, applicable measures of quantity, timelines, and/or cost-effectiveness may be included as appropriate.

Individual or Team Objective(s):

objective 2

* Comments



Employee Self Evaluation

The employee will select an overall rating value, add comments and then click the Complete button.

Overall Rating & Comments

Performance Rating Scale

Value	Definition
Unsatisfactory	Performance of established objectives and/or behaviors is deficient; rarely meets established objectives and/or behaviors, consistently fails to meet normal job requirements.
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.
Proficient/Meets Requirements	Performance meets established objectives and fully completes normal job requirements.
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.
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.

* Rating
Exceeds Requirements

* Comments

Remove Entry?

[Save Draft](#) [Complete](#)





Supervisor Evaluation

Step 5: The Supervisor evaluates the employee performance related to the established objectives. Supervisors are notified via email of the due date. To initiate the supervisor evaluation, click on the action item identified as the Supervisor Evaluation for each employee.

The screenshot shows the UNT System Employee Portal for Melinda Lilly. The page title is 'Your Action Items' and it includes a search bar. Below the search bar is a table with two columns: 'Item' and 'Description'. The table contains five rows of action items. The last row, 'Supervisor Evaluation' for Jayne Colavecchia, is circled in red. A green arrow points to the table.

Item	Description
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Abby Ogenche	Mid-Year Check In
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christle O'Quinn	Mid-Year Check In
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Darrylynn Williams	Supervisor Creates Plan
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Dorothy Cummings	Supervisor Creates Plan
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Jayne Colavecchia	Supervisor Evaluation



Supervisor Evaluation Tabs

The Supervisor will complete both the Performance Review tab and the Future Objectives tab. Instructions are provided in the blue area at the top of the page.

Supervisor Evaluation for Jayne Colavecchia

Instructions:

Tab 1 - Performance Review:

- Scroll down the page and enter comments for all objectives.
- At the bottom of the page, select the applicable overall performance rating for this review period.
- Insert comments reflecting overall performance.
- Select "Save Draft" if you wish to review or edit information before finalizing.
- If you would like to add supporting documents, please select the "Attachments" link.
- Select "Save and Continue" to move to the next section or select "Save Draft" if you wish to review or edit information before finalizing.

Tab 2 - Future Objectives:

- Enter individual or team performance objectives for the next review period. Enter a minimum of three and a maximum of five objectives.
- Select "Complete" when all actions have been completed and you are ready to finalize the supervisor evaluation.

Performance Review **Future Objectives**



Performance Review

Home 7 Performance ▾ Progress Notes 10

Supervisor Evaluation for Jayne Colavecchia

The supervisor and/or co-reviewer will enter required comments for each objective. When completing the evaluation, supervisors are encouraged to review the self evaluation, progress notes and any collected multi-rater feedback to aid in the evaluation process.



Performance Review | [Future Objectives](#)

Required fields are indicated with an asterisk (*).

Business Acumen

Proficiently executes the functions of the job with accuracy and timeliness and in a manner that instills trust and accomplishes the organization's mission. Expands understanding of own work and work of others. Exhibits own responsibility in completing job tasks. Exhibits proactive customer support to internal and external customers. Troubleshoots and initiates change. Understands the up and down-stream effects of inaccuracies or inefficiencies in own work. Troubleshoots and resolves issues. Efforts lead to positive outcomes. Uses technology to enhance processes and decision making.

Individual or Team Objective(s):

objective 1

*** Comments**

Results Driven

Achieves specific performance requirements expected of the employee during the appraisal period, focusing on measurable results from the strategic plan, departmental goals and outcomes clearly aligned to organizational goals and objectives. The performance requirements must contain measurable results and quality indicators, applicable measures of quantity, timelines, and/or cost-effectiveness may be included as appropriate.

Individual or Team Objective(s):

objective 2

*** Comments**



Performance Review (cont.)

The supervisor will select an overall performance rating for the review period, enter comments and select “Save & Continue” to complete the next step of Future Objectives or “Save Draft” to return later.

Overall Rating & Comments

Performance Rating Scale

Value	Definition
Unsatisfactory	Performance of established objectives and/or behaviors is deficient; rarely meets established objectives and/or behaviors, consistently fails to meet normal job requirements.
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.
Proficient/Meets Requirements	Performance meets established objectives and fully completes normal job requirements.
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.
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.

* Rating
Highly Accomplished

* Comments

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





Future Objectives

The supervisor will enter three to five individual or team objectives for next year's evaluation. To add additional objectives, select "Add Entry". Select "Save Draft" if additional edits are needed, or "Complete" once all objectives are entered.

Performance Review | **Future Objectives** | Attachments 0

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

Future Objectives

Please enter individual or team objectives for next year's evaluation. Enter a minimum of three and a maximum of five objectives. Click on "Add Entry" to add additional objectives as needed. Click on "Remove Entry" if any objectives need to be deleted.

* Individual or Team Objective

Indicate Individual Objectives with an (I) and Team Objectives with a (T)

Remove Entry?

[Add Entry](#) [Save Draft](#) [Complete](#)



Supervisor Schedules Meeting

Home 7 Performance - Progress Notes 10

Welcome to the Employee Portal, Melinda Lilly

Your Action Items

Start typing to search

Item	Description
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Abby Ogenche	Mid-Year Check In
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christle O'Quinn	Mid-Year Check In
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Darryllynn Williams	Supervisor Creates Plan
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Dorothy Cummings	Supervisor Creates Plan
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Jayne Colavecchia	Supervisor Schedules Meeting with Employee

Step 6: The supervisor will schedule a meeting with the employee to review the supervisor evaluation. If the overall evaluation score is Unsatisfactory, the supervisor will need to consult with System HR before scheduling the employee meeting.

To initiate this step, the supervisor will click on “Supervisor Schedules Meeting with Employee”



Supervisor Schedules Employee Meeting

New This Year! Once the meeting is scheduled and the supervisor clicks “Complete”, the evaluation document is released to the employee. This gives the employee the ability to review the feedback prior to the meeting and help facilitate the discussion.

Home 7 Performance - Progress Notes 10

Supervisor Schedules Meeting with Employee

Instructions:

- Schedule a meeting to review the supervisor evaluation with the employee.
- If the overall evaluation score is Unsatisfactory, please consult with Human Resources before scheduling evaluation meeting with the employee.
- To facilitate the performance discussion, please share the evaluation document with the employee prior to the meeting by selecting “Complete”.

[↗ Complete](#)



Employee Acknowledges Evaluation

Step 7: The employee logs in to PeopleAdmin/Performance Management to review the Supervisor Evaluation document. The employee will have a related action item on the home page. To initiate this step, the employee clicks the action item with the description “Employee Acknowledges Evaluation”. After meeting with their supervisor, the employee will select the “Acknowledge” button to complete the evaluation process.

The screenshot shows the UNT System Employee Portal interface. At the top left is the UNT SYSTEM logo. A breadcrumb trail shows 'Home 2 Performance - Progress Notes 1'. Below this is a welcome message: 'Welcome to the Employee Portal, Jayne Colavecchia'. A sidebar on the left contains 'My Reviews' and 'My Multi Rater Feedback'. The main content area is titled 'Your Action Items' and features a search bar with the placeholder text 'Start typing to search'. Below the search bar is a table with two columns: 'Item' and 'Description'. The table contains two rows of action items. The second row, 'Employee Acknowledges Evaluation', is circled in red.

Item	Description
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Christle O'Quinn	Complete Multi-Rater Evaluation
UNT System Administration Non-Supervisor FY21 Performance Evaluation Program for Jayne Colavecchia	Employee Acknowledges Evaluation



Employee Acknowledges Evaluation (cont.)

Following the evaluation meeting with their supervisor, the employee can enter comments and select “Acknowledge” on the bottom of the page to complete the evaluation process.

Overall Rating & Comments

Performance Rating Scale

Value	Definition
Unsatisfactory	Performance of established objectives and/or behaviors is deficient; rarely meets established objectives and/or behaviors, consistently fails to meet normal job requirements.
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.
Proficient/Meets Requirements	Performance meets established objectives and fully completes normal job requirements.
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.
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.

Rating
Highly Accomplished

Comments
aljtjsefja

Future Objectives
Please enter individual or team objectives for next year's evaluation. Enter a minimum of three and a maximum of five objectives. Click on "Add Entry" to add additional objectives as needed. Click on "Remove Entry" if any objectives need to be deleted.

Individual or Team Objective
future objective 1

Individual or Team Objective
future objective 2

Individual or Team Objective
future objective 3

Comment

[Check spelling](#)

[Acknowledge](#)



Employee Acknowledges Evaluation (cont.)

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

The screenshot shows the 'Supervisor Evaluation' page for Jayne Colavecchia. The page includes a navigation bar with 'Home', 'Performance', and 'Progress Notes'. On the left, there is a sidebar with the employee's name 'Jayne Colavecchia', supervisor 'Melinda Lilly', and department 'UNT System Administration'. The main content area displays the 'Business Acumen' evaluation with a description: 'Proficiently executes the functions of the job with accuracy and timeliness and in a manner that instills trust and accomplishes the organization's mission. Expands job knowledge for greater understanding of own work and work of others. Exhibits own responsibility in completing job tasks. Exhibits proactive customer support to internal and external customers. Identifies roadblocks and initiates change. Understands the up and down-stream effects of inaccuracies or inefficiencies in own work. Troubleshoots and resolves issues. Effectively communicates outcomes. Uses technology to enhance processes and decision making.' Below this, there are sections for 'Individual or Team Objective(s):' (objective 1) and 'Comments' (good). At the bottom, there is a 'Results Driven' section. On the right side, there is a sidebar with 'Overall Rating', 'Evaluation Type', 'Program Timeframe', 'Last Updated', 'Last Completed', 'Acknowledges Evaluation', and 'Employee Acknowledgements'. A red circle highlights the 'Print' button in the 'Actions' menu.



Appendix



Features of Performance Module

- Supervisors can access performance 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.



Rating Structure

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



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 & Resources

- HR Compensation and Performance Management Team
 - System issues: log-in, employees not listed, navigation issues, re-open a task
 - Email: Melinda.lilly@untsystem.edu
 - Phone: 940-369-6345
- UNT System HR Team
 - Performance concerns, goal setting, discussions about unsatisfactory ratings
 - Email: hr@untsystem.edu
 - Phone: 214-571-2426
- Performance Management Web Page <https://hr.untsystem.edu/peopleadmin>