



Staff Performance Management User Guide

UNT

FY 2023

8/1/22



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

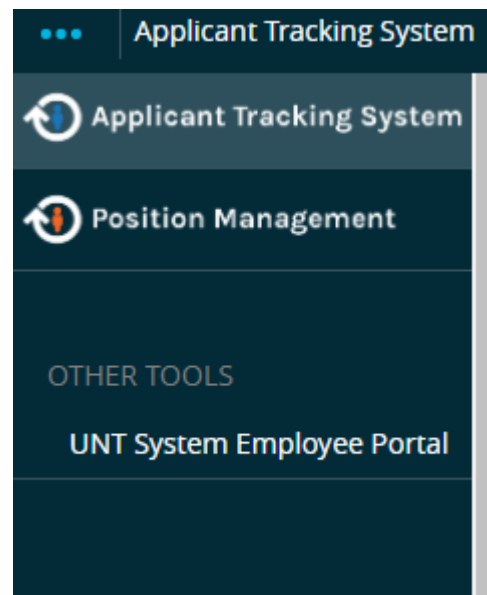
- Via employee portal login: <https://my.untsystem.edu>
 - Select the tile for Staff Performance Evaluations
- All supervisors and employees can access system but not everyone will have action items at the same time.



Also access via PeopleAdmin



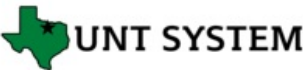
The employee portal can also be accessed through the PeopleAdmin System at <https://jobs.untsystem.edu/hr> by clicking on the **three dots** in the top left corner of the page and then selecting "UNT System Employee Portal"





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
UNT 2021 Staff Performance Evaluation Program for Emily	Supervisor Creates Plan	2021-03-31 Due in 2 months	Upcoming
UNT 2021 Staff Performance Evaluation Program for Julie	Supervisor Creates Plan	2021-03-31 Due in 2 months	Upcoming

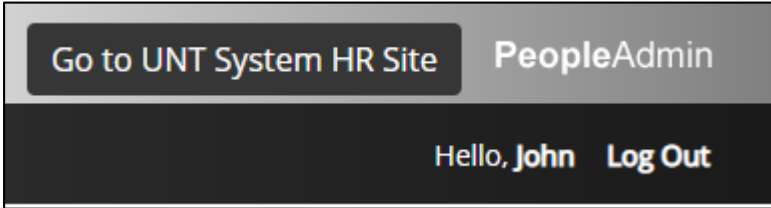
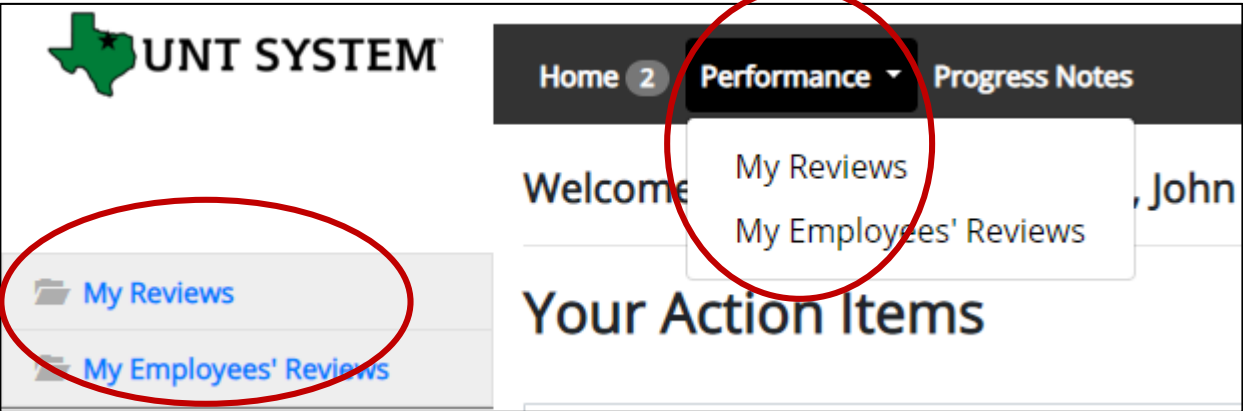
Showing 1 to 2 of 2 entries



Navigation (cont.)

The supervisor can view their own historical evaluations or their employee’s reviews by clicking “Performance” at the top of the page or by clicking “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 2nd 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. 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



Progress Notes Feature

Progress notes allow **both** the employee and supervisor to document achievements, kudos or coaching meetings throughout the year 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 notes between the employee or supervisor or they can remain private. 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 shared 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 System Enterprise employees by clicking “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 Croisdale	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 (*). [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?

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

Attachments 0

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

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 clicking “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

Required fields are indicated with an asterisk (*).

Individual Goals

* Goal

Develop and implement plan to manage l

☐ Remove Entry?

Add Entry

Save Draft

Save & Continue

- Goals that were entered during the prior year's performance evaluation process will automatically load. These goals can be edited or removed if changes have occurred.
- Click **Add Entry** to add goals or click **Remove Entry** to delete.
- Click **Save & Continue** to proceed to the Job Duties tab.



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

Individual Goals **Job Duties**

Job Duties

Refresh Job Duties from Director, Student Life Apply

Description of Job Duty

Collaborate with dean and associate deans to foster creativity and excellence in non-academic settings. Attend and actively participate in leadership meetings

Save Draft Complete

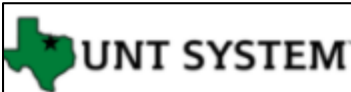
- Review job duties and click **Complete** to finalize the “Supervisor Reviews Plan” step
- Click **Save Draft** to save the plan and return to complete it at a later time.

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

Welcome to the Employee Portal, R

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

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 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

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

Required fields are indicated with an asterisk (*).

Individual Goals

Goal:

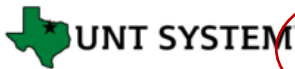
Work on unofficial committee that is in the beginning

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 previously established.



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
UNT 2021 Staff Performance Evaluation Program for Emily	Supervisor Evaluation
UNT 2021 Staff Performance Evaluation Program for Julie	Supervisor Creates Plan

UNT 2021 Staff Performance Evaluation Program for Emily	Supervisor Evaluation	2021-02-01 Due in 5 days	Upcoming
UNT 2021 Staff Performance Evaluation Program for Julie	Supervisor Creates Plan	2021-03-31 Due in 2 months	Upcoming



Supervisor Evaluation Tabs

The supervisor will complete 3 tabs (Individual Goals, Job Duties and Next Evaluation's Goals). Instructions are provided in the blue area at the top of the page.

Go to UNT System HR Site

PeopleAdmin

Home 6 Performance ▾ Progress Notes

Hello, Billy Log Out

Supervisor Evaluation

Actions ▾

Instructions:

Tab 1 - Individual Goals:

- If you would like to add attachments, please click the *Attachments* link below.
- Review the rating table below to understand the values for each rating score.
- Scroll down the page to enter a rating and comment for each established goal.
- Click *Save Draft* to review or edit information before finalizing.
- Once you have entered a rating and comment for each goal, click *Save & Continue* to move to the Job Duties tab.

Tab 2 - Job Duties:

- Scroll down the page and enter a rating and comments for each Job duty.
- Enter overall performance comments and click *Save & Continue* to move the Next Evaluation's Goals tab or click *Save Draft*.

Tab 3 - Next Evaluation's Goals:

- Enter established performance goals for the next review period.
- Click *Complete* when all actions have been completed.

Individual GoalsJob DutiesNext Evaluation's Goals

Attachments 0

UNT 2023 Staff Performance Evaluation Program (no competencies)

Review Status: Open

Overall Rating:

Evaluation Type: Annual

Program Timeframe: 05/23/22 to -

Last Updated: August 12, 2022 10:14

Last Completed Step: Employee Acknowledgement of Supervisor Evaluation

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

Acknowledgements

Supervisor Meet with Employee and Finalize Rating



Supervisor Evaluation – Individual Goals Tab

The supervisor will enter a rating and comment for each goal.

Click **Save Draft** to review or edit information before finalizing or click **Save & Continue** to proceed to the next 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 clicking **Save & Continue**. The supervisor may click **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

12345

1

Comments

Description of Job Duty:

this is job duty 2

* Rating

12345

1

Comments

Save Draft

Save & Continue



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 complete” will appear as seen below. 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 modifications.

Home 6 Performance ▾ Progress Notes

Hello, Billy Log Out

The Supervisor Evaluation has been marked as complete. ✕

Supervisor Evaluation f

Actions ▾

Instructions:

- Review the evaluation document and ratings to confirm the entered data and resulting score. The resulting rating can be located in the right-hand section of the page.
- If revision is needed, click **Return** at the bottom of the page or under the Action dropdown button. This will return to the supervisor.
- 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 your HR Business Partner before meeting with the employee.
- After the review discussion is held, click **Acknowledge**.

UNT 2023 Staff Performance Evaluation Program (no competencies)

Review Status: **Open**

Overall Rating: 2.85

Evaluation Type: Annual

Program Timeframe: 05/23/22 to -

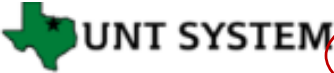
Return

Acknowledge



Step 6: Supervisor Meets with Employee & Finalize Rating

The next action for the supervisor is shown on their Home screen, “Supervisor Meets with Employee and Finalize Rating”. Click on the line and follow the steps in blue.



[Home](#) **6** [Performance](#) [Progress Notes](#)

Welcome to the Employee Portal, Bill

My Reviews

My Employees' Reviews

Your Action Items

Start typing to search

Item	Description	Due Date
UNT 2023 Staff Performance Evaluation Program (no compete	Supervisor Meet with Employee and Finalize Rating	2023-05-31 Due in 10 months



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

Go to UNT System HR Site

Welcome to the Employee Portal, !

My Reviews

Your Action Items

Start typing to search

Item	Description	Due Date
UNT 2021 Staff Performance Evaluation Program for	Self Evaluation	2021-04-30 Due in about 2 months
UNT 2021 Staff Performance Evaluation Program for !	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 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

Actions

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.

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 Team
 - System issues: log-in, employees not listed, navigation issues, re-open a task
 - Email: Jayne.Colavecchia@untsystem.edu or Aidee.Vaidya@untsystem.edu
- UNT Campus HR Business Partners (HRBP)
 - Setting goals, performance concerns, discussions about unsatisfactory ratings
 - Email: HRAdministration@untsystem.edu
 - Phone: 940-565-2281
- Performance Management Web Page
<https://hr.untsystem.edu/performance-management>