



# **The Performance Evaluation Process**



## **Employee Guide**



# **Index**

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# Things you can do to get ready

- Make sure your goals are correct here:
  - Sometimes our goals have changed throughout the year and we are unable to complete them.
  - You can add comments and edit goals throughout the year.
  - You should be discussing the progress of goals throughout the year during one-on-ones.
- You want to make sure you are evaluating the most accurate goals.
- It's best to edit a goal rather than cancel because the cancelled goals will still show up in the PEP.

## **Updating Goals Before the Self-Evaluation**

[Home](#)[Performance](#)[UNMJobs](#)[Recruiting Resources](#)

Overview

Job Responsibilities ...

Goal Evaluation

Self-Evaluation

2024 Goal Planning

Manager Evaluation

Performance Discussion

Acknowledgement an...

2023 Annual Performance Evaluation

Options

Lucy Lobo

1/1/2023 - 12/31/2023

25%

Goal Evaluation

**Employee:** Complete your self-evaluation of each of the goals listed below. You are required to select a drop-down rating for each goal. You can use the comment section to describe how goals were accomplished.

**Manager:** Complete your evaluation of each of Lucy Lobo's goals below. You can also enter comments to more fully explain your ratings. If you rated one or more goals Not Successful, you must enter an explanation in the comments area.

If the list of goals below is incomplete or any of the goals require modification, please choose "save and exit" and edit your goals before proceeding. Instructions for editing goals are [available on the PEP website](#).

Test 2023

Status : On Track

Start Date : 1/12/2023

Due Date : 12/31/2023

more...

Select

Select

Exceptional

Successful

Not Successful

Deferred/In Progress

Back

Save and Exit

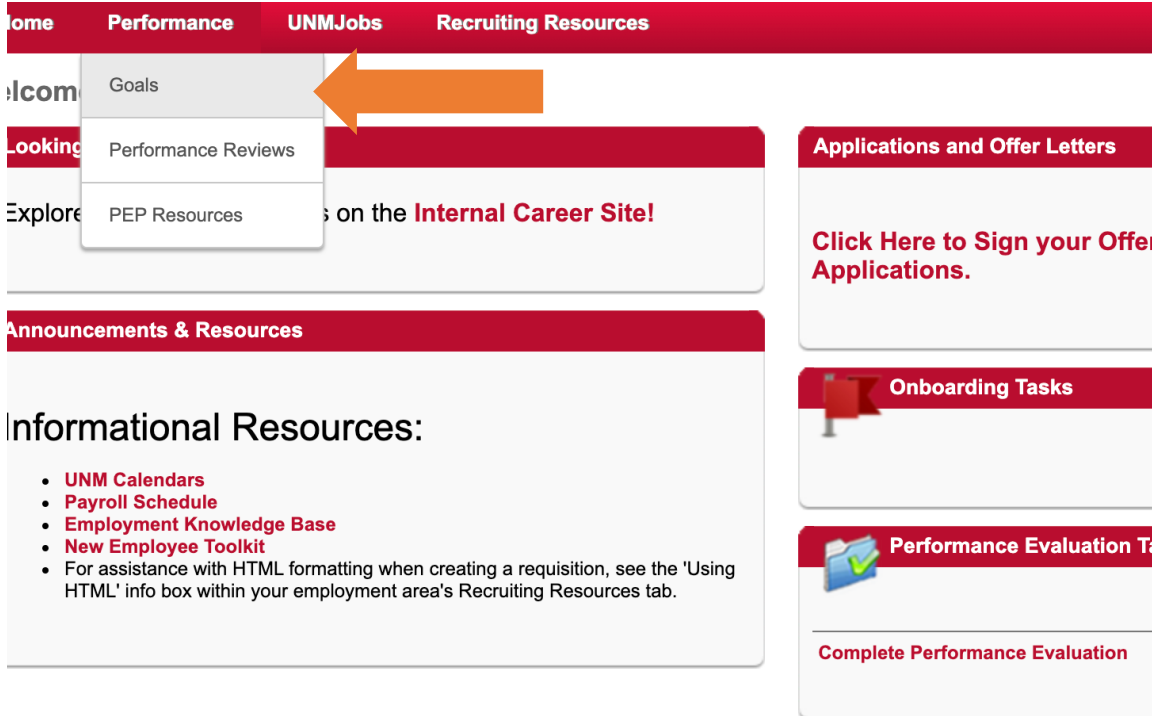
Save and Continue

This goal is no longer applicable. I cannot delete goals, so I need to add some comments to explain why I am cancelling the goal.

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5  
HUMAN  
RESOURCES

## 1. Click on Performance->Goals



The screenshot shows the top navigation bar with links: Home, Performance, UNMJobs, and Recruiting Resources. The Performance dropdown menu is open, showing options: Goals, Performance Reviews, and PEP Resources. An orange arrow points to the 'Goals' option. Below the navigation bar, there are sections for 'Applications and Offer Letters' with a link to sign offer applications, 'Onboarding Tasks', and 'Performance Evaluation Tools' with a link to complete performance evaluation. The 'Informational Resources' section lists links for UNM Calendars, Payroll Schedule, Employment Knowledge Base, and New Employee Toolkit, along with a note about HTML formatting for requisitions.

Home Performance UNMJobs Recruiting Resources

Goals  
Performance Reviews  
PEP Resources

Applications and Offer Letters

Click Here to Sign your Offer Applications.

Onboarding Tasks

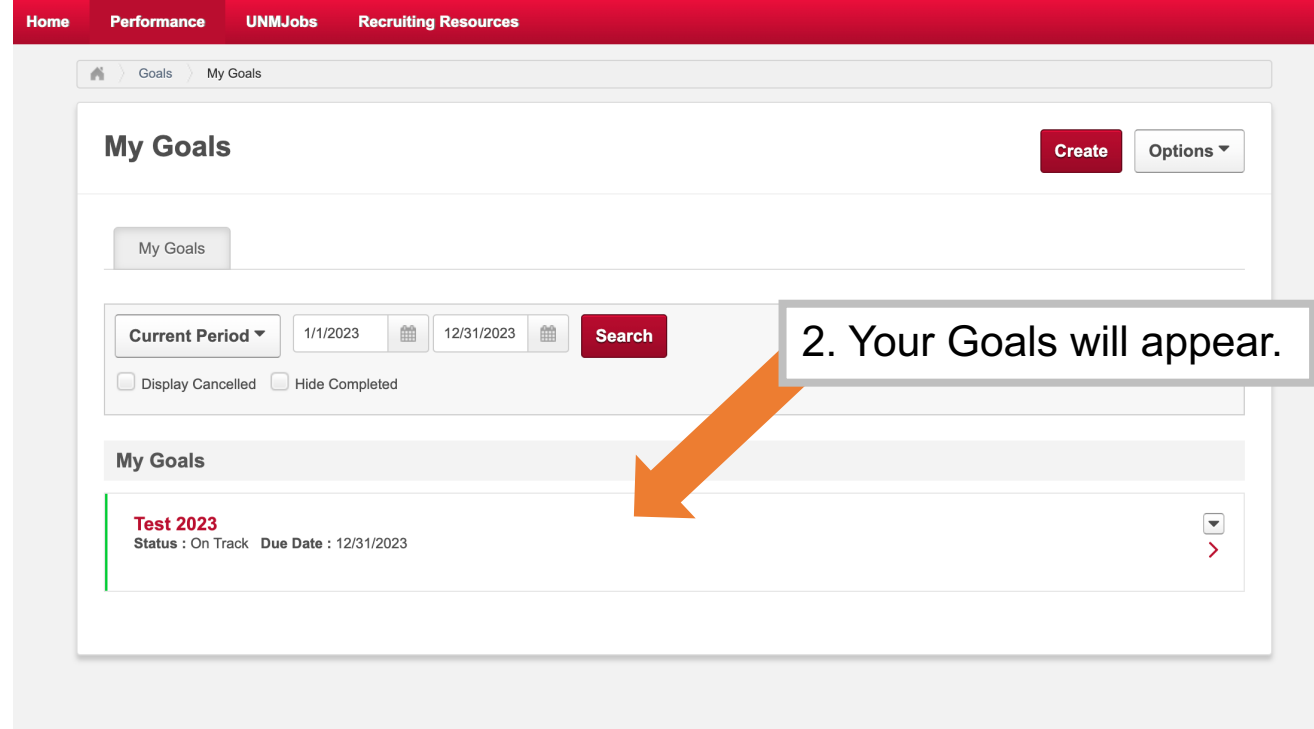
Performance Evaluation Tools

Complete Performance Evaluation

Informational Resources:

- UNM Calendars
- Payroll Schedule
- Employment Knowledge Base
- New Employee Toolkit

For assistance with HTML formatting when creating a requisition, see the 'Using HTML' info box within your employment area's Recruiting Resources tab.



The screenshot shows the 'My Goals' page. At the top, there's a 'Create' button and an 'Options' dropdown. Below this, there's a 'My Goals' tab. A search bar is present with a 'Current Period' dropdown, date pickers for '1/1/2023' and '12/31/2023', and a 'Search' button. There are also checkboxes for 'Display Cancelled' and 'Hide Completed'. Below the search bar, the 'My Goals' section displays a goal for 'Test 2023' with a status of 'On Track' and a due date of '12/31/2023'. An orange arrow points from the '2. Your Goals will appear.' text box to the goal entry.

Home Performance UNMJobs Recruiting Resources

Goals My Goals

My Goals

Create Options

My Goals

Current Period 1/1/2023 12/31/2023 Search

☐ Display Cancelled ☐ Hide Completed

My Goals

Test 2023  
Status : On Track Due Date : 12/31/2023

2. Your Goals will appear.

## My Goals

Create

Options ▾

My Goals

Current Period ▾

1/1/2023



12/31/2023



Search

☐ Display Cancelled ☐ Hide Completed

### My Goals

#### Test 2023

Status : On Track Due Date : 12/31/2023



Edit  
Copy  
Cancel  
View History

Click the dropdown and "Edit".

## Edit Goals

Options ▾

Add your goal using the form below.

All fields marked "\*" are required

Goal Name \*

Test 2023

Goal Description

B I U S I<sub>x</sub> [List Icons] ABC

Start Date

1/12/2023



Due Date \*

12/31/2023



Comments



Lucy Lobo commented 3/13/2023 11:58 AM

Test comment 2



Add Comment

Enter any relevant comments and click "Submit". If you are deferring it to a future goal- be sure to update Due date to 12/30/2023

Cancel

Submit



Home Performance UNMJobs Recruiting Resources

Goals My Goals

### My Goals

Create Options

My Goals

Current Period 1/1/2023 12/31/2023 Search

☐ Display Cancelled ☐ Hide Completed

#### My Goals

**Test 2023**  
Status : On Track Due Date : 12/31/2023

Edit  
Copy  
Cancel  
View History

In some cases, it might make more sense to cancel a goal. To do this- click the dropdown and choose "Cancel".

[Home](#)[Performance](#)[UNMJobs](#)[Recruiting Resources](#)

[Home](#) > [Goals](#) > [My Goals](#)

# My Goals

CreateOptions

My Goals

Current Period

1/1/2023

12/31/2023

Search

☒ Display Cancelled☐ Hide Completed

## My Goals

Test 2023

Status : Cancelled Due Date : 12/31/2023



The cancelled goal will still appear on your PEP, but you will not be required to rate it.

# **The Self-Evaluation**

[Home](#) [Performance](#) [UNMJobs](#) [Recruiting Resources](#)

Left sidebar shows the tasks you have completed.

Overview

Job Responsibilities ...

Goal Evaluation

Self-Evaluation

2024 Goal Planning

Manager Evaluation

Performance Discussion

Acknowledgement an...

2023 Annual Performance Evaluation

Options

Lucy Lobo

1/1/2023 - 12/31/2023

0%

Overview

Welcome to UNM's annual Performance Evaluation and Planning process!

Click the "Get Started" button below to begin. You can also use the links on the left hand side of the page to navigate to later sections in the evaluation.

Managers, if needed you can use the "Reopen Step" button below to send the self-evaluation back to your employee for editing.

Visit the PEP website for detailed instructions on reopening steps.

Job aids, FAQs, and additional materials to help you navigate this process are available by clicking here.

Review Step Progression

Self Evaluation

Due : 1/31/2024

Manager Evaluation

Performance Discussion and Submission

Employee Acknowledgement

Get Started

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The review will open to the Overview page. Click "Get Started" to begin.

## 2023 Annual Performance Evaluation

Options ▾



**Lucy Lobo**  
1/1/2023 - 12/31/2023

0%

### Job Responsibilities Evaluation

**Employee:** Complete your self-evaluation of each of the job responsibilities listed below. You can use the comment section to describe exceptional performance. If you selected "Not Successful" for any job responsibility, please address in the comments section.

**Manager:** Complete your evaluation of each of Lucy Lobo's job responsibilities below. If the employee was exceptionally successful in any area, please describe in the provided comment section. If you rated one or more job responsibilities Not Successful, you must enter an explanation in the comments area.

**Job Knowledge:** Demonstrates proficiency in knowledge and skills required of the job; contributes to the goals and mission of the department.

Select ▾ ? \*

✓ Select Select

Successful

Not Successful

completes regular assignments in a timely and efficient manner.

Select ▾ ? \*

**Quality of Work:** Ensures work is of proper quality; checks for accuracy.

Select ▾ ? \*

**Initiative:** Takes it upon oneself to complete regular tasks; seeks additional skills, information, and available resources to ensure high quality.

Select ▾ ? \*

**Continuous Improvement:** Participates in initiatives to improve work processes. Demonstrates flexibility in response to new or improved work processes.

Select ▾ ? \*

### Job Responsibilities Evaluation

- Choose "Successful" or "Not Successful" from the drop-down menu.



- Overview
- Job Responsibilities ...**
- Goal Evaluation
- Self-Evaluation
- 2024 Goal Planning
- Manager Evaluation
- Performance Discussion
- Acknowledgement an...

Required Training: Was the employee successful in completing all required University and job-specific training obligations?

Select

Supervisor Training Responsibility: Has employee's staff successfully completed all required University and job-specific training?. If employee is not a supervisor, please choose "successful."

Select

If employee performed exceptionally in any area(s) above, you may provide additional feedback here:

Comments:

Rich text editor with toolbar (Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Font, Size, Undo, Redo) and a large text area for comments.

If 'Not Successful' was selected for any of the above areas, enter comments addressing each area identified:

Comments:

Rich text editor with toolbar (Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Font, Size, Undo, Redo) and a large text area for comments.

Back

Save and Exit

Save and Continue

- If you feel you performed exceptionally in any of the areas- you can enter some additional feedback.

- If you gave yourself "Not Successful" for any are, be sure to enter feedback to justify the rating.

- Click "Save and Continue" to move onto the next section.

Home Performance UNMJobs Recruiting Resources

## 2023 Annual Performance Evaluation

Options ▾

**Lucy Lobo**  
1/1/2023 - 12/31/2023

25%

**Goal Evaluation**

**Employee:** Complete your self-evaluation of each of the goals listed below. You are required to select a drop-down rating for each goal. You can use the comment section to describe how goals were accomplished.

**Manager:** Complete your evaluation of each of Lucy Lobo's goals below. You can also enter comments to more fully explain your ratings. If you rated one or more goals Not Successful, you must enter an explanation in the comments area.

If the list of goals below is incomplete or any of the goals require modification, please choose "save and exit" and your goals before proceeding. Instructions for editing goals are [available on the PEP website](#).

Test 2023

Status : On Track  
Start Date : 1/12/2023  
Due Date : 12/31/2023  
[more...](#)

Select ▾ ?

- ✓ Select
- Exceptional
- Successful
- Not Successful
- Deferred/In Progress

Back Save and Exit **Save and Continue**

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- For each goal choose the appropriate rating from the dropdown- “Exceptional” “Successful” “Not Successful” “Deferred in Progress.”
- You must choose a rating for each goal
- Enter any comments if necessary
- Click “Save and Continue”.

Click “Save and Continue”.

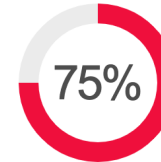
- Overview
- Job Responsibilities ...
- Goal Evaluation
- Self-Evaluation
- 2024 Goal Planning**
- Manager Evaluation
- Performance Discussion
- Acknowledgement an...

## 2023 Annual Performance Evaluation

Options ▾



**Lucy Lobo**  
1/1/2023 - 12/31/2023



## 2024 Goal Planning

Add Goals

**Employee:** Use this section to develop and propose your goals for the next year. Your manager will review and discuss these with you during your performance discussion. Start by clicking the 'Add Goals' button. Enter a title and description for your first goal, then click 'Save'. Continue adding goals until all new goals have been added to the system.

Take a moment to review and confirm that all of your new goals have been entered and are correct, then click the 'Submit' button. You will see another pop-up box asking you to confirm your submission - just click 'Submit' again, which will route your Self-Evaluation to your manager.

**Manager:** Review the goals that Lucy Lobo has proposed for the coming year below. You may edit, add, or delete goals as needed. Once all of Lucy Lobo's goals are finalized, click the "Submit" button below. This does not submit the final review, only advances the review to the next step in the process, the Performance Discussion.

Visit the PEP website for job aids and additional information on the remaining steps in the process.

Back

Save and Exit

Submit

### Future Goal Planning

- You will enter your future goals on this page.
- To add goals- click on “Add Goals”.

Do not click “Submit” until you have entered ALL of your Future goals.



Home Performance UNMJobs Recruiting Resources

## Create Goals

Add your goal using the form below.

All fields marked "\*" are required

**Goal Name \***

Goal Name

**Goal Description**

B I U S I<sub>x</sub> [List Icons] ABC

Start Date Due Date \*

1/1/2024 12/31/2024

Cancel Save

Enter your goal.

Enter any comments.

Make sure dates are 1/1/2024 - 12/31/2024.

Click "Save".

HomePerformanceUNMJobsRecruiting Resources

Overview

Job Responsibilities ...

Goal Evaluation

Self-Evaluation

2024 Goal Planning

Manager Evaluation

Performance Discussior

Acknowledgement an...

2023 Annual Performance Evaluation

Options

Lucy Lobo

1/1/2023 - 12/31/2023

100%

2024 Goal Planning

Add Goals

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Visit the PEP website for job aids and additional information on the remaining steps in the process.

Crowd Wave

New – Please Review

Status : On Track

Start Date : 1/1/2024

Due Date : 12/31/2024

more...

Comments :

B I U S x x I

Font

Size

A A

Back Save and Exit Submit

After you “Save” your goal – make sure you click “Add Goals” to enter more goals. Don’t click on “Submit” until you have entered in ALL your future goals.

Click “Submit” once you have entered in ALL your future goals.

PEP  
ONLINE

18  
NM  
HUMAN  
RESOURCES

**Submit Review** x

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel Submit

**Lucy Lobo**  
1/1/2023 - 12/31/2023

100%

### 2024 Goal Planning

**Employee:** Use this section to develop and propose your goals for the next year. Your manager will review and discuss these with you during your performance discussion. Start by clicking the 'Add Goals' button. Enter a title and description for your first goal, then click 'Save'. Continue adding goals until all new goals have been added to the system.

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Visit the PEP website for job aids and additional information on the remaining steps in the process.

**Crowd Wave**

**New -- Please Review**

Status : On Track  
Start Date : 1/1/2024  
Due Date : 12/31/2024  
more...

Comments :

The following screen will appear.

- If you need to enter more goals, we can reopen your review.
- Make sure you click “Submit” or your manager will not receive your review.

## **Performance Discussion Step**

# Guidelines for the Performance Discussion

- Now that the performance evaluation has been submitted, the next step, the Performance Discussion is scheduled.
- Make sure your manager has printed a copy of the review before the discussion so the two of you can address any concerns, add comments, goals or change ratings.
- The Performance Discussion is a meaningful conversation between the manager and employee that will encourage growth and learning.
- It makes mutual expectations clear and sets goals for both parties.
- It maintains open lines of communication.



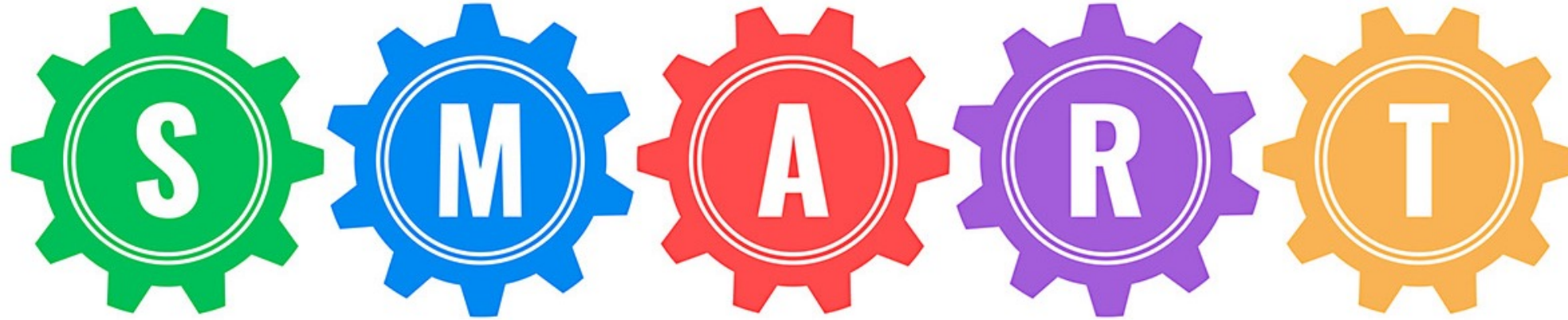
# The Performance Discussion

- Use this time to address any concerns you have.
- Speak positively.
- Listen.
- Ask questions about the feedback you are receiving if you need clarification.
- Address any areas you need support in to accomplish your goals.

# Things to think about before the discussion

- What could you be doing differently?
- What new skills and knowledge do you need to become more of an asset?
- What goals does your manager have for you?
- How can you be more helpful to your team?
- What challenges does your manager predict over the next year?

# Guide to SMART Goals



- ✓ Specific
- ✓ Measurable
- ✓ Achievable
- ✓ Results-Focused
- ✓ Time Bound





- Specific- your goal should be clear and specific.



- It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines.



- Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you closer to it..



- Your goals need to measure actual outputs or results, not activities. These results could include: products, deliverables and accomplishments.



- Every goal needs a target date, so that you have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your longer-term goals.



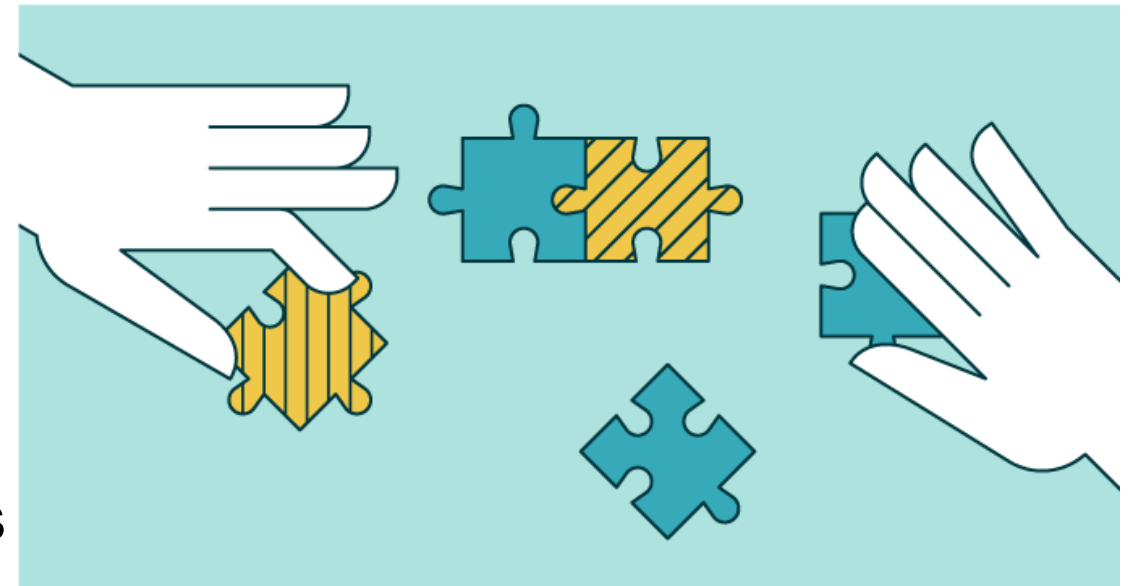
# Two Types of Feedback

- Reinforcing
  - Highlights behaviors
  - Builds confidence
  - Inspires team members
  - Creates a culture of respect
- Redirecting
  - Raises awareness
  - Highlights impact
  - Clarifies expected behaviors
  - Communicates belief



# What is Effective Feedback?

- Spirit of improvement
- Moves an individual or team forward
- Non judgmental
- Continuous and in the moment
- Honest and conversational
- Inquisitive
- Specific
- Descriptive not critical
- Mainly focused on building strengths



# Seeking Feedback Guidelines

- Declare your intent
  - Let the other person know why you want feedback. Your intent is typically to learn, develop, and get better as a leader.
- Ask for specific feedback
  - Avoid asking questions that won't generate useful information. Generic question like "How am I doing?" won't give you any specific insight. Instead, try the following:
    - I've been working on \_\_\_\_\_. How could I get better?
    - What, specifically, do we need to do better with respect to \_\_\_\_\_(system/structure/process)?

# Seeking Feedback Guidelines

- Listen empathically.
  - Listen to understand, not to explain or defend yourself.
- Acknowledge the feedback.
  - “Thanks for the feedback. Let me think about how I can apply it.”
  - “I am grateful for your specific observations. They are very helpful. This is what I plan to do.”
- Evaluate the feedback.
  - Use good judgement to determine what to do with the feedback.
- Commit to action.
  - Make commitments carefully and keep them at all costs. Say what you are going to do and then do it.



# Feedback Cautions

- Don't use generic language
  - Vague or extreme statements may sound insincere.
- Don't make assumptions
  - Feedback that's based on wrong assumptions is not valid. Ensure you have the facts about a situation to give accurate feedback.



# Signing and Acknowledgement

- You will get the link to complete your evaluation once your manager has signed and acknowledged it.
- Click on the link and you can click through to the sign and acknowledge page.
- Once you sign and acknowledge the process is complete.

# What if I don't agree with my PEP?

- If you refuse to sign your review remember:
  - Signing is not agreement- **it is just acknowledging you were given the opportunity.**
- If you still do not want to sign- discuss this with your HR Consultant.



# Trouble Shooting

# Common Issues

- My manager did not receive my evaluation and I submitted it-
  - Have your manager verify they are listed as the “Manager” in UNM Jobs.
  - Are you sure you submitted it? Double check that the task is gone from your UNM Jobs tasks and that you clicked “Submit”.
- I accidentally clicked submit and I had more 2022 goals to enter
  - Have your manager or contact PEP to have your evaluation reopened and you can go back in and add more goals.

## Contact:

Email: [pep@unm.edu](mailto:pep@unm.edu)

Web: [unmjobs.unm.edu](http://unmjobs.unm.edu)