2020 Performance Evaluation Training

HR Agents Guide
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Process Overview
The review will open to the Overview page. Click “Get Started” to begin.
Job Responsibilities Evaluation

• Choose “Successful” or “Not Successful” from the drop-down menu.
• 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 area, be sure to enter feedback to justify the rating.

• Click “Save and Continue” to move onto the next section.
• 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”.
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.
Create Goals

Add your goal using the form below.

All fields marked "*" are required

Goal Name *

Goal Name

Goal Description

Enter your goal.

Enter any comments.

Make sure dates are 1/1/2020 12/31/2021.

Click “Save”.
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.
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.
The Manager Evaluation of the Employee
Click on “Complete Manager Evaluation” of your direct report.
Your current task is highlighted, and you can see completed tasks. Click “Get Started” to begin.
Choose a rating from the dropdown.

You are able to see how your employee rated themselves.
Click “Save and Continue” once you have rated the job responsibilities.

If your direct report was exceptional - you can enter comments. It is also recommended that if you rated any of the job responsibilities as “unsuccessful” - enter comments to justify the rating.
Click “Save and Continue”.
Here is how your direct report rated themselves.

You can see any comments.

Click “Save and Continue”.
Choose a rating from the dropdown.

Enter any comments if necessary.

Click “Save and Continue”
Review and click “Submit”
Click “Submit”
You will be able to reopen the review if needed.
Performance Discussion Step
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.

You are now on the Performance Discussion phase of the evaluation.

Click "Get Started"
Print the Review before the Performance Discussion

This is a great time to print the review for your employee. You can review the evaluation with the employee during the Performance Discussion to go over any comments, make any changes, add goals, or address any concerns.
Review the job responsibilities rating.

Enter any comments if you needed to.

Click “Save and Continue”.
Click “Save and Continue”.

Review the Goal Evaluation and add any comments if necessary.
After reviewing – Click “Save and Continue”.

Self-Evaluation

Select an overall self-evaluation rating for Job Responsibilities and 2020 Goal Evaluation. The next step is to begin goal planning for 2021.

Overall Job Responsibilities Rating (Self-Evaluation)

Successful

Overall Goal Rating (Self-Evaluation)

Successful

Employee Comments
Review and click “Save and Continue”.

Manager Evaluation

Select an overall rating for Job Responsibilities and 2020 Goal Evaluation. The next step is to review and complete goal planning for 2021.

Overall Job Responsibilities Rating (Manager)
- Successful

Overall Goal Rating (Manager)
- Successful

Manager Comments

[Text Editing Area]
Your direct report will have entered their 2019 goals during their self-evaluation.

Enter any comments related to the goal.

Click “Save and Continue”.
Choose the meeting date from the dropdown calendar.

Enter comments from the meeting.

Click “Save and Continue”
2020 Annual Performance Evaluation

Acknowledgement and Submission

I acknowledge that providing my electronic approval is equivalent to signing this document and understand that my electronic signature is binding.

Please enter any comments if necessary and click “Submit.”

Click “Sign” and enter any comments if necessary and click “Submit.”
Remember - we can reopen the review - Click “Submit”.
Trouble Shooting
Common Issues - Manager does not see employee’s review

• Make sure the manager is correct - remember the PEP goes to the “manager” not the “supervisor”.
How to update manager in HR Reports

Click on “Employee Application”.

Welcome to HR Reports. Please make a selection below to begin.

Employee Application

Employee Application allows the user to view all current active employees by entering a UHM ID or selecting by Level 3 Org. You can also view current active employees by entering a position code. This application shows Terminated Employees, Inactive for Refined Employee Name Changes, HRS Employee History and HRS Fugio employees.
Click “Reports To”.
Choose either All data or Staff only Data.

Select either Level 3 Org or View All Orgs.
Choose the Level 3 Org(s).
Select the Org(s).
Run the Report.
Check to make sure the manager is correct.

When there is a “yes” under mismatch, it usually indicates the wrong manager.

If the manager is not correct- Click “Update”.
You can search for the position or enter the position for the correct manager and click “Lookup Position”.
Make sure the position is correct.

Click "Update Manager Position".
Reports
Click “Reports” and then “Standard Reports”.

Welcome, Bonnie.

Staff & Faculty: Search for jobs in the CAREER SITE!

Students: Search for jobs in the CAREER SITE!

Informational Resources:
These are the Reports you will see
You can print/download up to 500 performance evaluation.
Bulk Report

1. Enter date Range.
2. Choose the Task.
3. Select the user criteria.
4. Choose which reviews.
5. Give the report a title.
Performance Review for single User
Performance Review report

1. Choose employee.
2. Choose the Review Task.
3. Report will download as a PDF that you can save or print.
Step Status Report.
Performance review step report

Choose user criteria.

Choose the task.

Choose how you want information displayed.
Print one or more Performance Reviews for a single user.
Performance Review Details Report

1. Date.

2. User criteria.

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