2021 Performance Evaluation Training

HR Agents Guide

Index

Process Overview

Left sidebar shows the tasks you have completed.

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

2020 Annual Performance Evaluation

Options ▾

- Overview
- Job Responsibilities E…
- Goal Evaluation
- Self-Evaluation
- 2021 Goal Planning
- Manager Evaluation
- Performance Discussion
- Acknowledgement an…

Lucy Lobo
1/1/2020 - 12/31/2020

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: 1/31/2021

Manager Evaluation

Performance Discussion and Submission

Employee Acknowledgement

Get Started

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Cornerstone

Job Responsibilities Evaluation

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

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

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

Comments:

B *I* U S x₂ x² Iₓ | ☰ ☱ | ☲ ☲ | ☰ ☰ ☰ ☰ | Font ▾ | Size ▾ | A▾ A▾

ABC | ↩ ↪ | ✂ ⎘ 📋 📋 📋 | ⊞ ☰

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

Comments:

B *I* U S x₂ x² Iₓ | ☰ ☱ | ☲ ☲ | ☰ ☰ ☰ ☰ | Font ▾ | Size ▾ | A▾ A▾

ABC | ↩ ↪ | ✂ ⎘ 📋 📋 📋 | ⊞ ☰

Overview

Job Responsibilities E…

Goal Evaluation

Self-Evaluation

2021 Goal Planning

Manager Evaluation

Performance Discussion

Acknowledgement an…

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.

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HUMAN RESOURCES

- 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".

2020 Annual Performance Evaluation

Options ▾

Lucy Lobo
1/1/2020 - 12/31/2020

50%

Changes have not been submitted and will not be finalized until submission

2021 Goal Planning

Add Goals

Employee: Use this section to develop and propose your goals for 2021. 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 2021 performance goals have been added to the system.

Take a moment to review and confirm that all of your 2021 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 2021 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.

Increase Crowd Wave

Status: On Track
Start Date: 1/1/2021
Due Date: 12/31/2021
more...

Cancel Goal

Comments:

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.

Create Goals

Add your goal using the form below.

All fields marked "*" are required

Goal Name *

[Goal Name] ← Enter your goal.

Goal Description

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[text editor area] ← Enter any comments.

Start Date   **Due Date** *

[1/1/2021]   [12/31/2021] ← Make sure dates are 1/1/2020 12/31/2021.

[Cancel] [**Save**] ← Click "Save".

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2020 Annual Performance Evaluation

Options ▼

Lucy Lobo
1/1/2020 - 12/31/2020

50%

Changes have not been submitted and will not be finalized until submission

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

Increase Crowd Wave

Status: On Track
Start Date: 1/1/2021
Due Date: 12/31/2021

more...

Cancel Goal

Comments:

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.

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UNM HUMAN RESOURCES

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

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."

Successful ▼ ❓*

👤 **Lucy Lobo** (Self) Rated: Successful Review: 2020 Annual Performance Evaluation Time: 11/9/2020 3:41 PM

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

Comments:

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

Comments:

Back   Save and Exit   **Save and Continue**

If your direct report was exceptional- you can enter comments. It is also recommended that if you rated any of the jobs responsibilities as "unsuccessful"- enter comments to justify the rating.

Click "Save and Continue" once you have rated the job responsibilities.

Goal Evaluation
Self-Evaluation
Manager Evaluation
2021 Goal Planning
Performance Discussion
Acknowledgement an…

14%

Job Responsibilities E…

Goal Evaluation

Self-Evaluation

Manager Evaluation

2021 Goal Planning

Performance Discussion

Acknowledgement an…

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 <u>must</u> 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.

Increase Popcorn Sales

Status: On Track
Start Date: 11/9/2020
Due Date: 12/31/2020

more…

Successful ▾ ❓ *

Comments:

👤 Lucy Lobo (Self) Rated: Successful Review: 2020 Annual Performance Evaluation Time: 11/9/2020 3:41 PM

Back   Save and Exit   **Save and Continue**

Click "Save and Continue".

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UNM HUMAN RESOURCES

Review and click "Submit"

Submit Review

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

Cancel   Submit

Options ▾

80%

Overview

Job Responsibilities Ev...

Goal Evaluation

Self-Evaluation

2020 Goal Planning   Add Goals

Click "Submit"
You will be able to reopen the review if needed.

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Performance Discussion Step

Welcome, Louie.

Looking for a Job?

Explore Career Opportunities on the **Internal Career Site!**

Announcements & Resources

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.

Applications and Offer Letters

Click Here to Sign your Offer Letter or Check the Status of your Applications.

Onboarding Tasks

No Pending Actions

Performance Evaluation Tasks

	Due Date
Complete Performance Evaluation	1/31/2021
Complete Manager Evaluation of Lucy Lobo	2/15/2021

Need Help?

UNMJobs Help for Hiring Coordinators, Departments, and Applicants:

UNMJobs Support Information

UNMJobs Feedback

Help with Online Performance Evaluations:

Visit the Performance Evaluation Website

Send an Email to Human Resources PEP

You will see the link reappear on your tasks. Click to continue with the review

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UNM HUMAN RESOURCES

Lucy Lobo
1/1/2020 - 12/31/2020

0%

Overview

Job Responsibilities E...

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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 | ✓ |

| Manager Evaluation | ✓ |

| Performance Discussion and Submission Due: 2/28/2021 | ✓ |

| Employee Acknowledgement | ✓ |

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

Reopen Step   **Get Started**

Click "Get Started"

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UNM HUMAN RESOURCES

Print the Review before the Performance Discussion

2020 Annual Performance Evaluation

Options ▾

- Add Co-Planners
- Attachments
- Print Review
- Print Reviewee Version

Lucy Lobo
1/1/2020 - 12/31/2020

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.

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UNM HUMAN RESOURCES

Lucy Lobo
1/1/2020 - 12/31/2020

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.

Successful ▼ ❓*

Lucy Lobo (Self) Rated: Successful Review: 2020 Annual Performance Evaluation Time: 11/9/2020 3:41 PM

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

Comments:

B I U S x₂ x² Iₓ   ☰ ☰ ≡ ≡ ≡ ≡ ≡ Font ▼ Size ▼ A▼ A▼

ABC ↩ ↪   ✂ ⎘ 📋 📄 📄   ▦ ≣

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

Comments:

B I U S x₂ x² Iₓ   ☰ ☰ ≡ ≡ ≡ ≡ ≡ Font ▼ Size ▼ A▼ A▼

ABC ↩ ↪   ✂ ⎘ 📋 📄 📄   ▦ ≣

Back   Save and Exit   Save and Continue

Review the job responsibilities rating.

Enter any comments if you needed to.

Click "Save and Continue".

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HUMAN RESOURCES

Job Responsibilities E…

Goal Evaluation

Self-Evaluation

Manager Evaluation

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Performance Discussion

Acknowledgement an…

Lucy Lobo
1/1/2020 - 12/31/2020

14%

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 <u>must</u> 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.

Increase Popcorn Sales

Status: On Track
Start Date: 11/9/2020
Due Date: 12/31/2020
more...

Successful ?*

Comments:

Lucy Lobo (Self) Rated: Successful Review: 2020 Annual Performance Evaluation Time: 11/9/2020 3:41 PM

Review the Goal Evaluation and add any comments if necessary.

Back   Save and Exit   **Save and Continue**

Click "Save and Continue".

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Lucy Lobo
1/1/2020 - 12/31/2020

43%

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

Comments:

| B | I | U | S | x₂ | x² | Iₓ | | Font ▼ | Size ▼ | A ▼ | A ▼ |

Back   Save and Exit   **Save and Continue**

Review and click "Save and Continue".

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Your direct report will have entered their 2019 goals during their self-evaluation.

Enter any comments related to the goal.

Click "Save and Continue".

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
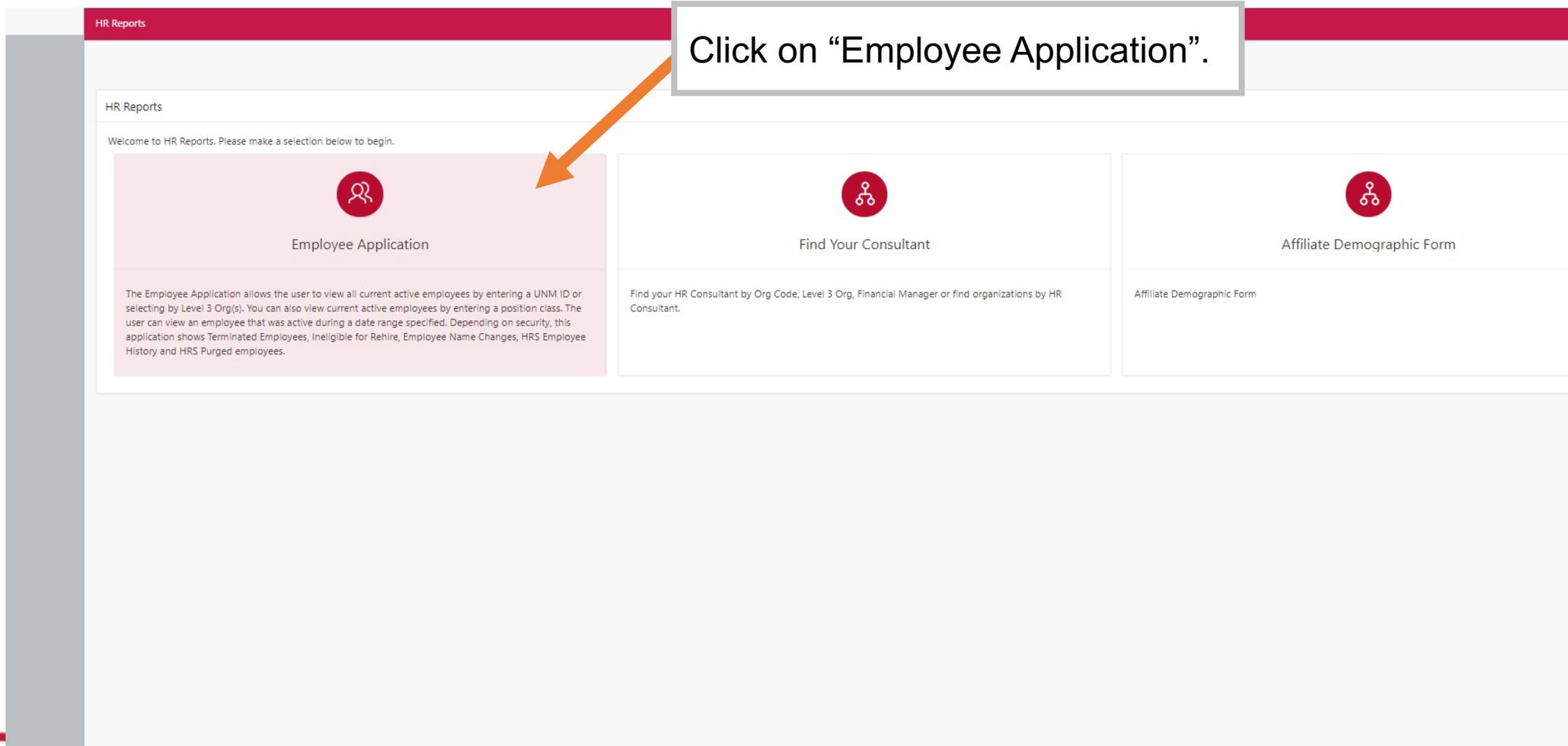
Click on "Employee Application".

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".

Reports To Update Form ×

Update Reports To Position

Position: S06730

Current Manager Position: S04325

Current Manager: Rodriguez

Change Manager Position

Search New Manager Position:

[Lookup Position]

You can search for the position or enter the position for the correct manager and click "Lookup Position".

Reports

Reports

Click "Reports" and then "Standard Reports".

These are the Reports you will see

Standard Reports

You can print/download up to 500 performance evaluation.

Bulk Report

USER CRITERIA

User Criteria: The availability criteria that you select will only include employees who meet the foll...

Select Criteria
- Select Criteria
- Employment Area
- Position Class
- Hiring Department
- Group
- Position Number
- Job Suffix
- Contract Type
- Labor Index
- Labor Account
- Supervisor
- Job Change Reason
- IPEDS Primary Function
- Primary Activity
- Employee Group
- Users

ADVANCED

Which performance reviews wou...

○ Performance reviews for ...ed within the date filters.

○ Performance reviews for ...mance review period.

Print Preferences ○ Employe

PROCESS REPORT

Report Title:
(If no report title is entered, the title of the report will default to...

📄 Process Report

Home   Performance   UNMJobs   Reports   Recruiting Resources

On Wednesday, November 13, 2019 from 3:00 PM MST to 7:00 PM MST, your portal will be briefly unavailable due to a software update.

Reports >

Bulk Performance Reviews

Report Criteria

Define a date range or specific Performance Review Task and download one or more performance reviews for the selected users. When defining a date range, you may select to print al... ...ning a specific Task, you may select to print all ...ted today will not be included as the review is not recorded yet in the data warehouse. You may select to print all reviews in either the Manager view or the Employee view. Note that there is a limit of 500...

REVIEW FILTERS

- ⦿ Date Criteria: Select ▾ From: 1/1/2019 To: 12/31/2019
- ○ Task: Select Task

> 1. Enter date Range.

> 2. Choose the Task.

USER CRITERIA

User Criteria: The availability criteria that you select will only include employees who meet the following criteria: (User is or below Louie Lobo)
Select Criteria

> 3. Select the user criteria.

ADVANCED

Which performance reviews would you like to print?

- ⦿ Performance reviews for which the completion date is equal to or contained within the date filters.
- ○ Performance reviews for which the report date criteria overlaps the performance review period.

Print Preferences ⦿ Employee View ○ Manager View

> 4. Choose which reviews.

PROCESS REPORT

Report Title:
(If no report title is entered, the title of the report will default to Bulk Performance Reviews)

📄 Process Report

> 5. Give the report a title.

> 6. Process report.

Processed Reports

Report Name	Create Date	Last Run	Output	Options

PEP ONLINE

UNM HUMAN RESOURCES

Performance Review for single User

Performance Review report

Performance Review

Report Criteria

View a performance review for a single user.

ADVANCED FILTERS

Employee Reviewed: `Select Employee`

Performance Review Task: `Select Task`

OUTPUT

🖶 Print Performance Review

cornerstone

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.

Reports

Click on a report category to view those reports. You may search for any reports by title or description.
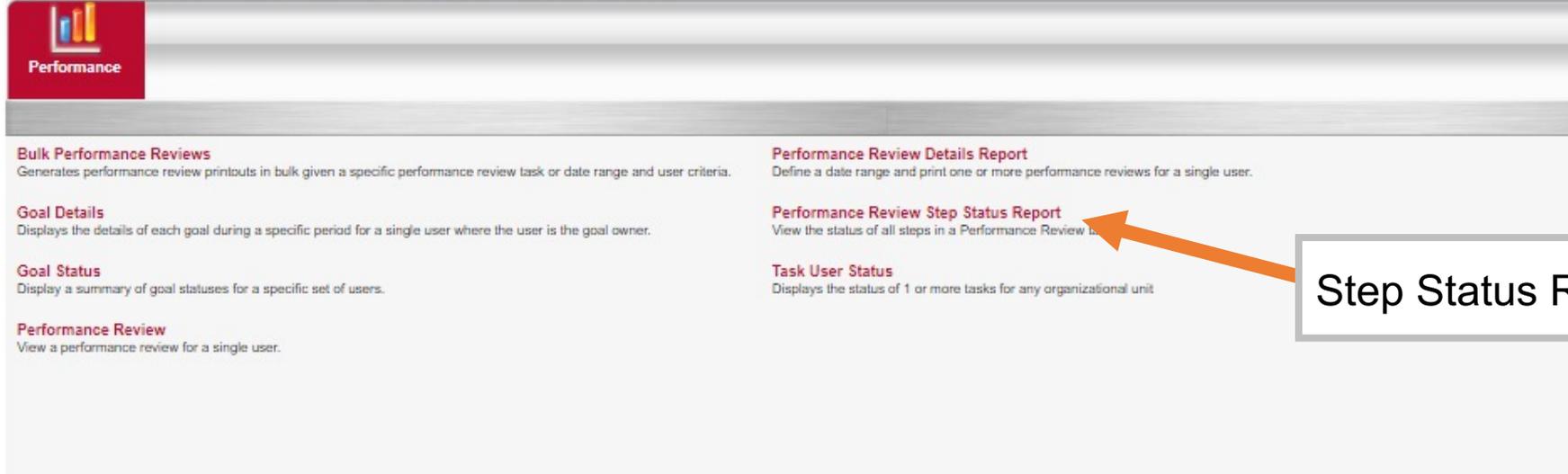
Performance

Print one or more Performance Reviews for a single user.

Bulk Performance Reviews
Generates performance review printouts in bulk given a specific performance review task or date range and user criteria.

Performance Review Details Report
Define a date range and print one or more performance reviews for a single user.

Goal Details
Displays the details of each goal during a specific period for a single user where the user is the goal owner.

Performance Review Step Status Report
View the status of all steps in a Performance Review task.

Goal Status
Display a summary of goal statuses for a specific set of users.

Task User Status
Displays the status of 1 or more tasks for any organizational unit

Performance Review
View a performance review for a single user.

Performance Review Details Report

Contact:

Email: **pep@unm.edu**

Web: **unmjobs.unm.edu**