



# 2021 Performance Evaluation Training

**HR Agents Guide**



# Index

**Process Overview...Page 3**

**The Manager Evaluation of the Employee...Page 12**

**Performance Discussion Step...Page 23**

**Troubleshooting...Page35**

**Reports...Page 44**

# Process Overview

Home Performance UNMJobs Recruiting Resources

## 2020 Annual Performance Evaluation

Options ▾

**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

Cornerstone

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Left sidebar shows the tasks you have completed.

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

Home Performance UNMJobs Recruiting Resources

## 2020 Annual Performance Evaluation Options ▾

**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.**

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 ?\*

### 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 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

### 2020 Annual Performance Evaluation

Options ▾

**Lucy Lobo**  
11/1/2020 - 12/31/2020

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.

**Increase Popcorn Sales** ▾

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

Select ▾ ⓘ

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

ed: Successful Review: 2020 Annual Performance Evaluation Time: 11/10/2020 2:05 PM

Font Size A A

Back Save and Exit **Save and Continue**

- 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".



## Create Goals

Add your goal using the form below.

All fields marked "\*" are required

Goal Name \*

Goal Name

Enter your goal.

Goal Description

B I U S I\_x

Rich text editor area for Goal Description with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and undo.

Enter any comments.

Start Date

1/1/2021

Due Date \*

12/31/2021

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

Cancel

Save

Click "Save".

**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:

**B I U S x<sup>2</sup> I<sub>x</sub>** ☰ ☲ ☱ ☴ ☵ ☶ ☷ Font ▾ Size ▾ A<sup>-</sup> A<sup>+</sup>

🔍 ↩️ ⏪ ⏩ ✂️ 📄 📄 📄 📄 📄 📄

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.

## 2020 Annual Performance Evaluation

Options ▾

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

100%

### Submit Review

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

Cancel Submit

**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.

**Increase Popcorn Sales**

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

Successful

Comments:

Lucy Lobo (Manager) Rated: Successful Review: 2020 Annual Performance Evaluation Time: 11/10/2020 2:05 PM

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**

Search for jobs in the **CAREER CENTER!**  
or jobs on the **CAREER SITE!**

#### Resources

#### Resources:

Knowledge Base  
Toolkit  
HTML formatting when creating a requisition, see the 'Using HTML' info box within  
Recruiting Resources tab.

#### Onboarding Tasks

No Pending Actions

#### Performance Evaluation Tasks

	Due
Complete Performance Evaluation	3/17
Complete Manager Evaluation of Lucy Lobo	3/13

Click on "Complete Manager Evaluation" of your direct report.

## 2020 Annual Performance Evaluation

Options ▾

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



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



### 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  
Due: 2/15/2021
- Performance Discussion and Submission
- Employee Acknowledgement

Your current task is highlighted, and you can see completed tasks.

Reopen Step **Get Started**

Click "Get Started" to begin.

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

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



### 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
- Successful
- Not Successful

Rated: Successful Review: 2020 Annual Performance Evaluation Time: 11/9/2020 3:41 PM

Choose a rating from the dropdown.

**Productivity: Successfully completes regular assignments in a timely and efficient manner.**

Successful

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

You are able to see how your employee rated themselves.

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:



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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.

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

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



## 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.**

**Increase Popcorn Sales**

Status: On Track  
Start Date: 11/9/2020  
Due Date: 12/31/2020  
[more...](#)

Select 

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

Successful Review: 2020 Annual Performance Evaluation Time: 11/9/2020 3:41 PM

Choose a rating for goals from the dropdown.

You are able to see how your direct report rated themselves.

- Job Responsibilities E...
- Goal Evaluation**
- Self-Evaluation
- Manager Evaluation
- 2021 Goal Planning
- Performance Discussion
- Acknowledgement an...



1/1/2020 - 12/31/2020



## 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.

**Increase Popcorn Sales** [dropdown]

Status: On Track  
Start Date: 11/9/2020  
Due Date: 12/31/2020  
[more...](#)

Successful [dropdown] ⓘ

Comments:

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

[Rich text editor toolbar]

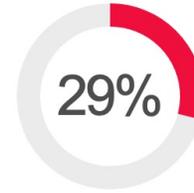
[Back] [Save and Exit] **Save and Continue**

Click "Save and Continue".

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



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



## 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

Here is how your direct report rated themselves.

### Overall Goal Rating (Self-Evaluation)

Successful

You can see any comments.

Employee Comments

Back

Save and Exit

Save and Continue

Click "Save and Continue".



Home Performance UNMJobs Reports Recruiting Resources

### 2020 Annual Performance Evaluation

Options ▾

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

57%

### 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** ▾

**New - Please Review**

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

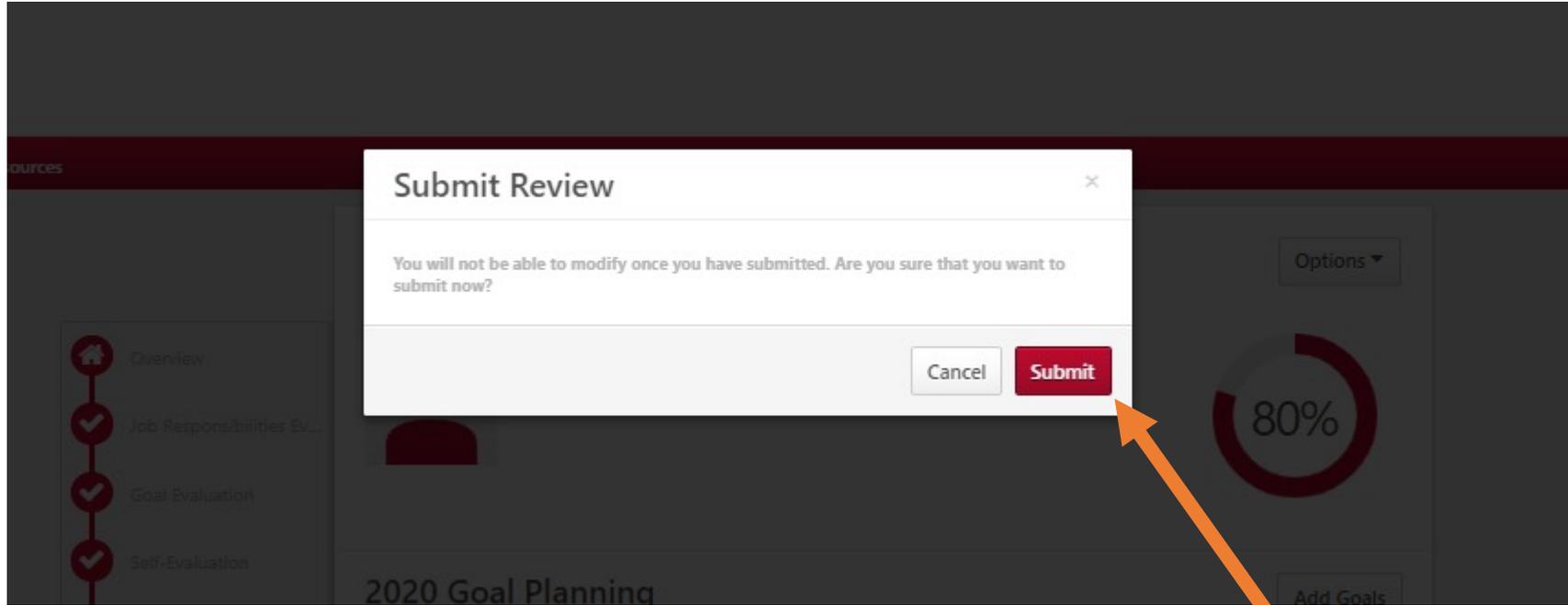
Comments:

**B I U S X<sup>2</sup> I<sub>x</sub>** [Rich Text Editor Icons] Font Size [A- A+]

Back Save and Exit **Submit**

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Review and click "Submit"



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

# 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
<a href="#">Complete Performance Evaluation</a>	1/31/2021
<a href="#">Complete Manager Evaluation of Lucy Lobo</a>	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

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



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



## 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"

# Print the Review before the Performance Discussion

## 2020 Annual Performance Evaluation



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

Options ▾

Add Co-Planners

Attachments

Print Review

Print Reviewee Version

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.

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

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



### 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 x<sub>2</sub> x<sup>2</sup> I<sub>x</sub>** [Rich Text Editor Icons] Font Size A A

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

Comments:

**B I U S x<sub>2</sub> x<sup>2</sup> I<sub>x</sub>** [Rich Text Editor Icons] Font Size A A

Back Save and Exit **Save and Continue**

Review the job responsibilities rating.

Enter any comments if you needed to.

Click "Save and Continue".



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



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



## 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.

**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

**B I U S x<sub>2</sub> x<sup>2</sup> I<sub>x</sub>** Font Size A A

Back Save and Exit Save and Continue

Review the Goal Evaluation and add any comments if necessary.

Click "Save and Continue".

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



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



## 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

Back

Save and Exit

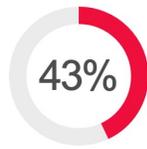
Save and Continue

After reviewing – Click “Save and Continue”.

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



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



## 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 x<sub>2</sub> x<sup>e</sup> I<sub>x</sub>** | **Font** | **Size** | **A-** **A+**

ABC |

- Back
- Save and Exit
- Save and Continue**

Review and click "Save and Continue".

Home Performance UNMJobs Reports Recruiting Resources

### 2020 Annual Performance Evaluation

Options ▾

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

57%

### 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

New - Please Review

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

Comments:

Rich text editor toolbar with options: Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Font, Size, Text Color, Background Color.

Back Save and Exit 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".

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

### 2020 Annual Performance Evaluation

Options ▾

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

71%

#### Performance Discussion

Once the self-evaluation and manager evaluation are completed, you and Lucy Lobo should meet to review and discuss the performance evaluation and goal planning.

Using the calendar drop-down, specify the date the meeting will take place. Click "Save and Continue" to sign the evaluation.

**In Person Meeting Date:**

**Details of the meeting:**

**B I U S Ix**

Choose the meeting date from the dropdown calendar.

Enter comments from the meeting.

Click "Save and Continue"

Home Performance UNMJobs Reports Recruiting Resources

### 2020 Annual Performance Evaluation

Options ▾

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

86%

#### Acknowledgement and Submission

Once the evaluation discussion has occurred, the employee and manager may enter any final comments below and must sign this review, acknowledging the evaluation occurred. Signature denotes that you have read, discussed, and understand all comments in this review; however, does not necessarily indicate agreement. Please refer to UAP #3230, Section 4.5, for information on how the employee may indicate disagreement with the review's contents.

Self  
Pending Signature

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

Comment

**B I U S I** [Rich Text Editor Icons]

Back Save and Exit **Submit**

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“X” here

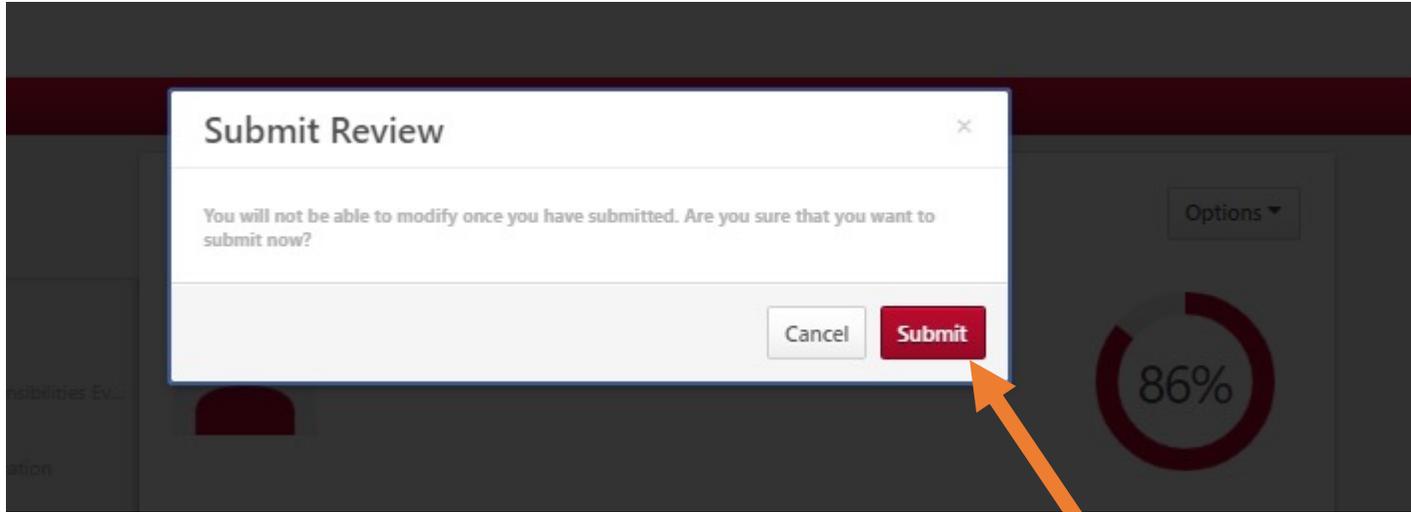


Click “Sign”



Enter any comments if necessary and click “Submit”





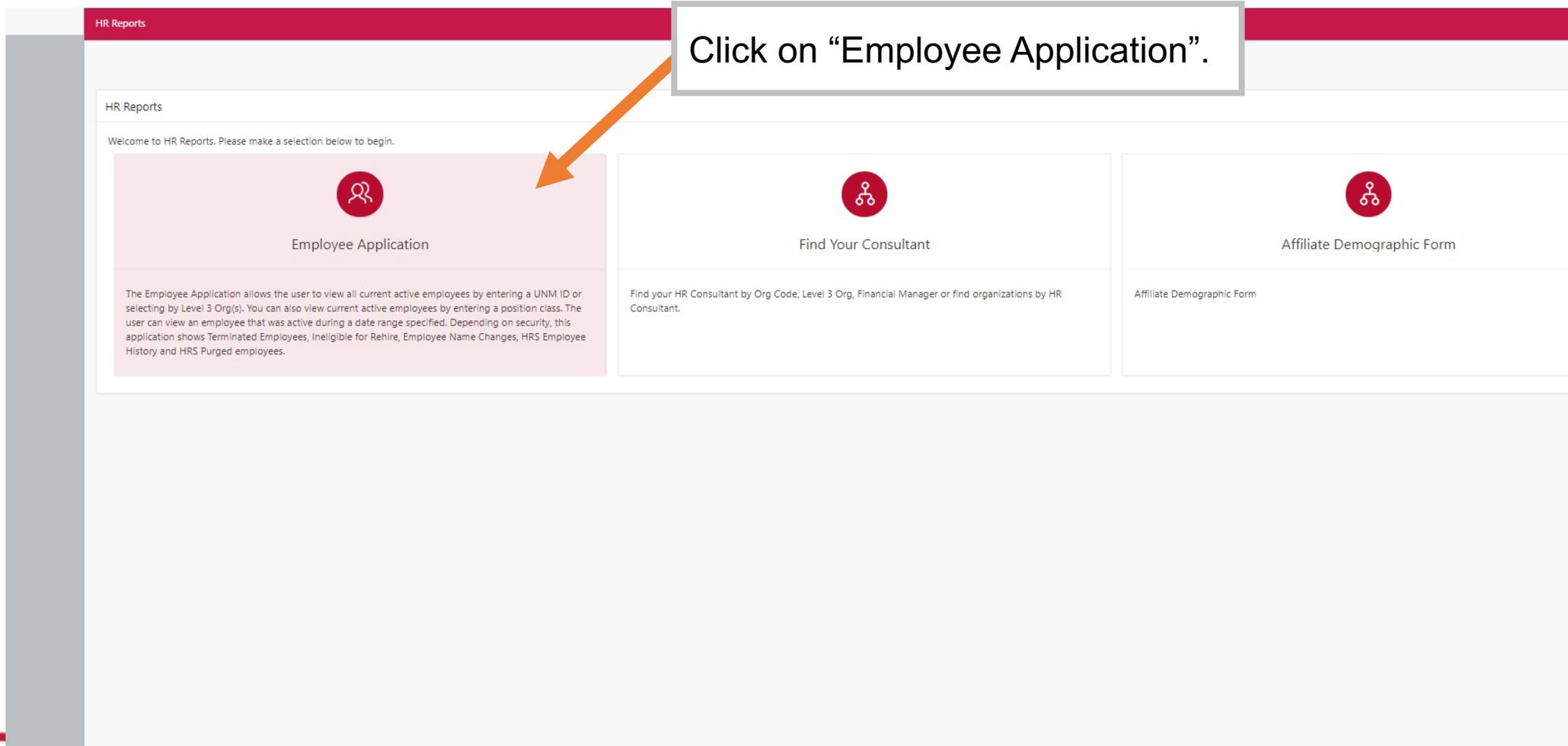
Remember- we can reopen the review- Click "Submit".

# 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



The screenshot shows the HR Reports dashboard. At the top, there is a red header bar with the text "HR Reports". Below this, a grey box contains the instruction "Click on 'Employee Application'.". An orange arrow points from this box to the "Employee Application" tile. The dashboard itself has a white background with a grey sidebar on the left. The main content area is titled "HR Reports" and includes a welcome message: "Welcome to HR Reports. Please make a selection below to begin." Below this message are three tiles: "Employee Application" (highlighted in pink), "Find Your Consultant", and "Affiliate Demographic Form". Each tile has a red circular icon with a white symbol. The "Employee Application" tile includes a detailed description of its functionality.

HR Reports

Click on "Employee Application".

HR Reports

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

**Employee Application**

The Employee Application allows the user to view all current active employees by entering a UNM ID or selecting by Level 3 Org(s). You can also view current active employees by entering a position class. The user can view an employee that was active during a date range specified. Depending on security, this application shows Terminated Employees, Ineligible for Rehire, Employee Name Changes, HRS Employee History and HRS Purged employees.

**Find Your Consultant**

Find your HR Consultant by Org Code, Level 3 Org, Financial Manager or find organizations by HR Consultant.

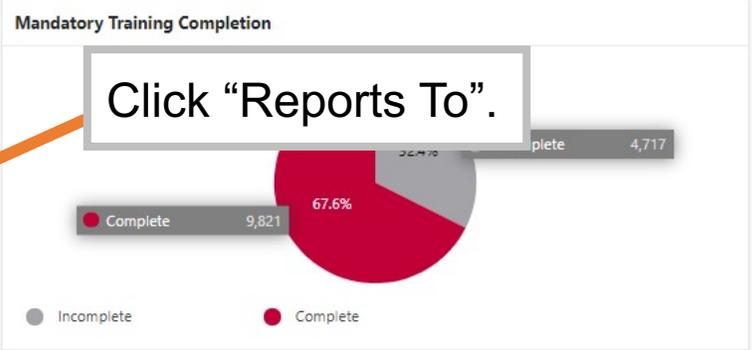
**Affiliate Demographic Form**

Affiliate Demographic Form

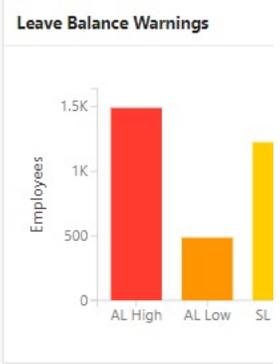
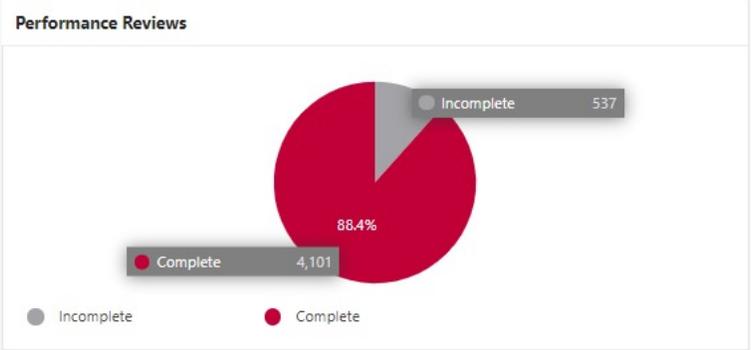
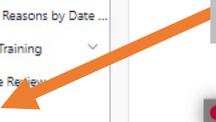
- Home
- Employee Application
- Dashboard
- Active Employees
- Archive
- Earnings Detail
- Employees By Date Range
- Employees Salary By Date Ra...
- Employee Overtime
- EPAF Reports
- ERB Exception
- Job Change Reasons by Date...
- Mandatory Training
- Performance Review
- Reports To
- Retirement Eligibility

## Employee Dashboard

Charts for: All Orgs



Click "Reports To".



## Reports To

### Reports Selection

This report shows the manager information that is associated with each active position. The report also shows the supervisor that is listed

Report type

Select Report Type:

Choose either All data or Staff only Data.

### Reports To Data

Q  Go Actions

- Level 3 Org
- Level 3 Org Desc
- Org
- Org Desc
- Highlight Mismatches

## Reports To

### Reports Selection

This report shows the manager information that is associated with each active position. The report a

Report type

Select Report Type:

Select either Level 3 Org or View All Orgs.

### Reports To Data

Q  Go Actions

- Level 3 Org
- Level 3 Org Desc
- Org
- Org Desc
- Highlight Mismatches

# Reports To

## Reports Selection

This report shows the manager information that is associated with each active position. The report also shows the manager information that is different from the person listed as the supervisor on the job record.

Report type: All Data

Select Report Type: Select by Level 3 Org

Select Level 3 Org(s):

- ADE Associate VP for Facilities Mgmt
- ADG VP Institutional Support Services
- ADH PPD Administration
- ADJ Information Technologies
- AEA VP Institutional Adv College
- AFA VP HSC Administration
- AFB HS Library and Informatics Center
- APC School of Medicine
- APD College of Nursing

Choose the Level 3 Org (s).

Select the Org(s).

Select Org(s):

- 730A Human Resources
- 730B1 HR Administration
- 730B2 HR Benefits
- 730B3 HR Client Services
- 730B4 HR Compensation
- 730B5 HR Service Center
- 730B6 HR Business Services
- 730C0 HR Labor & Employee Relations
- 730D HR Union & Training

ADF Human Resources HR

730B Human Resources Department

Run Report

Run the Report.

## Reports To Data

Go Actions

- Level 3 Org
- Level 3 Org Desc
- Org
- Org Desc
- Highlight Mismatches

Reports To

Select Org: 730A Human Resources

- 730B Human Resources Department
- 730B1 HR Administration
- 730B2 HR Benefits
- 730B3 HR Client Services
- 730B4 HR Compensation
- 730B5 HR Service Center
- 730B6 HR Business Services
- 730C1 HR Learning & Development Solutions

730E Employee Organizational Development

Run Report

Reports To Data

Q

Go Actions

- Level 3 Org
- Level 3 Org Desc
- Org
- Org Desc
- Highlight Mismatches**

Check to make sure the manager is correct.

Level 3 Org : ADF, Level 3 Org Desc : Human Resources HR, Org : 730E, Org Desc : Employee Organizational Development

UNM ID	Employee	Position	Status	Position Title	Position Type	Manager Position	Update Manager Position	Manager UNM ID	Manager Name	Manager Position	Manager Status	Manager Position Title	Manager Position Type	Manager Manager Position	Manager Manager Status	Manager Manager Position Title	Manager Manager Position Type
101489840	O'Neill, Bryan C.	101489840	A	Technical Training Consultant	S	101489840	Update	101489840	Rodriguez, John G.	101489840	SE	Technical Training Consultant	S	101489840	SE	Technical Training Consultant	S
101489841	Minkus Holmes, Bonnie E.	S06730	A	Employee & Org Devt Consultnt	S	S00688	Update	101489840	O'Neill, Bryan C.	101489840	SE	Technical Training Consultant	S	101489840	SE	Technical Training Consultant	S
101489842	Rodriguez, John G.	101489842	A	Technical Training Consultant	S	101489842	Update	101489842	Rodriguez, John G.	101489842	SE	Technical Training Consultant	S	101489842	SE	Technical Training Consultant	S
101489843	Strommen, Susan C.	101489843	A	Technical Training Consultant	S	101489843	Update	101489843	Strommen, Susan C.	101489843	SE	Technical Training Consultant	S	101489843	SE	Technical Training Consultant	S

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: S04325  
Position:

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 To Update Form

Update Reports To Position

Position: S06730

Current Manager: S00688  
Position:

Current Manager: O'Neill

Change Manager Position

Search New Manager Position:  
S04325

Lookup Position

Go

Select Position	Position	Position Status	Position Title
<input checked="" type="checkbox"/>	S04325	A	Mgr,Employee & Org Devt

1 - 1

Authorization

By clicking on the **Update Manager Position** button, I authorize this change to be made immediately in the 'Reports To' field in Banner (NBAPOSN).

Note: All changes are tracked.

Update Manager Position

Make sure the position is correct.

Click "Update Manager Position".

# Reports

# Reports

Click "Reports" and then "Standard Reports".

The screenshot shows the UNMJobs portal navigation menu. The 'Reports' tab is highlighted, and a dropdown menu is open, showing 'Standard Reports', 'Custom Reports', 'Dashboards', and 'Reporting 2.0'. An orange arrow points from the text box above to the 'Standard Reports' option. A yellow notification banner at the top states: 'On Wednesday, November 13, 2019 from 3:00 PM to 4:00 PM, your portal will be briefly unavailable due to a software update.'

**Home** Performance UNMJobs **Reports** Admin Integration Suite Recruit Recruiting Resources

On Wednesday, November 13, 2019 from 3:00 PM to 4:00 PM, your portal will be briefly unavailable due to a software update.

Welcome, Bonnie.

**Looking for a Job?**

Staff & Faculty: Search for jobs in [UNMJobs](#) **TER!**

Students: Search for jobs on the [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.

**Onboarding Tasks**

No Pending Actions

**Performance Evaluation Tasks**

	Due Date
Complete Performance Evaluation	3/1/2020
Complete Performance Evaluation	3/1/2020

**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](#)

**Cornerstone**

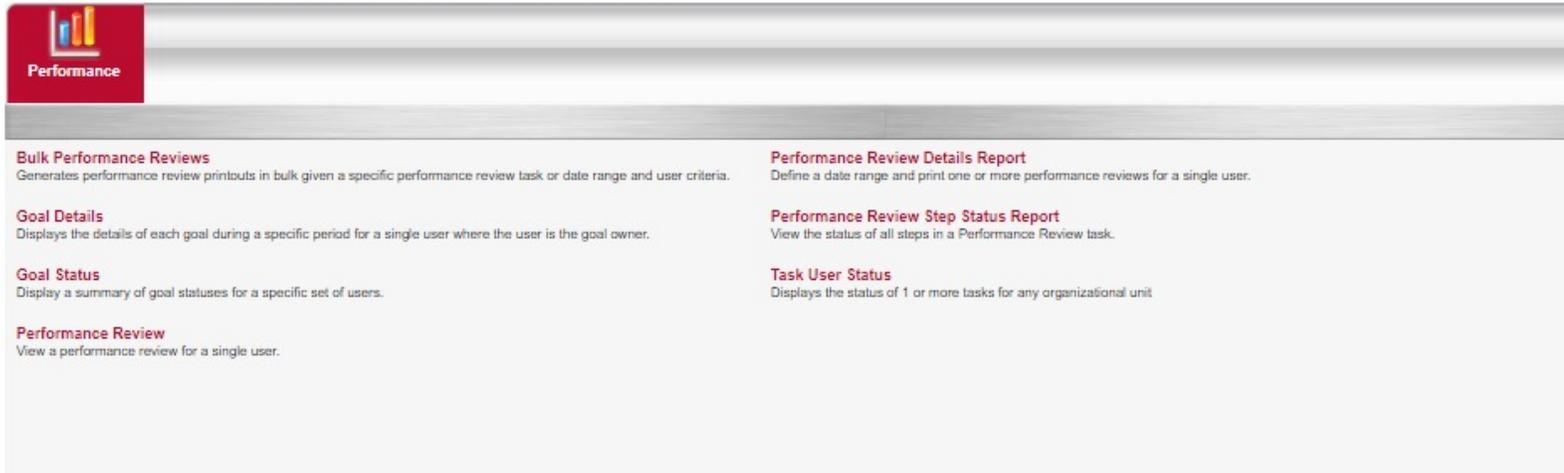
Powered by Cornerstone  
All Rights Reserved. Terms of Use



# These are the Reports you will see

## Reports

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



**Performance**

- Bulk Performance Reviews**  
Generates performance review printouts in bulk given a specific performance review task or date range and user criteria.
- Goal Details**  
Displays the details of each goal during a specific period for a single user where the user is the goal owner.
- Goal Status**  
Display a summary of goal statuses for a specific set of users.
- Performance Review**  
View a performance review for a single user.
- Performance Review Details Report**  
Define a date range and print one or more performance reviews for a single user.
- Performance Review Step Status Report**  
View the status of all steps in a Performance Review task.
- Task User Status**  
Displays the status of 1 or more tasks for any organizational unit.

# Standard Reports

**Reports**  
Click on a report category to view those reports. You may see

**Performance**

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

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

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

**Performance Review**  
View a performance review for a single user.

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

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

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

You can print/download up to 500 performance evaluation.

# Bulk 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 all reviews 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 reviews per report.

**REVIEW FILTERS**

Date Criteria:  From:  To:   
 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)

**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

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

**Processed Reports**

Report Name	Create Date	Last Run	Output	Options
-------------	-------------	----------	--------	---------

1. Enter date Range.

2. Choose the Task.

3. Select the user criteria.

4. Choose which reviews.

5. Give the report a title.

6. Process report.

**USER CRITERIA**

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

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



# Performance Review for single User

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

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

**Performance**

- 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

# Performance Review report

The screenshot shows a web interface for generating a Performance Review report. It features a red header bar with the text "Report Criteria" and a sub-header "Performance Review". Below this, there is a section for "ADVANCED FILTERS" containing two dropdown menus: "Employee Reviewed: Select Employee" and "Performance Review Task: Select Task". An "OUTPUT" section contains a "Print Performance Review" button. Three callout boxes with arrows point to these elements: "1. Choose employee." points to the first dropdown, "2. Choose the Review Task." points to the second dropdown, and "3. Report will download as a PDF that you can save or print." points to the print button. The Cornerstone logo is visible at the bottom left of the interface.

Performance Review

**Report Criteria**

View a performance review for a single user.

**ADVANCED FILTERS**

Employee Reviewed:

Performance Review Task:

**OUTPUT**

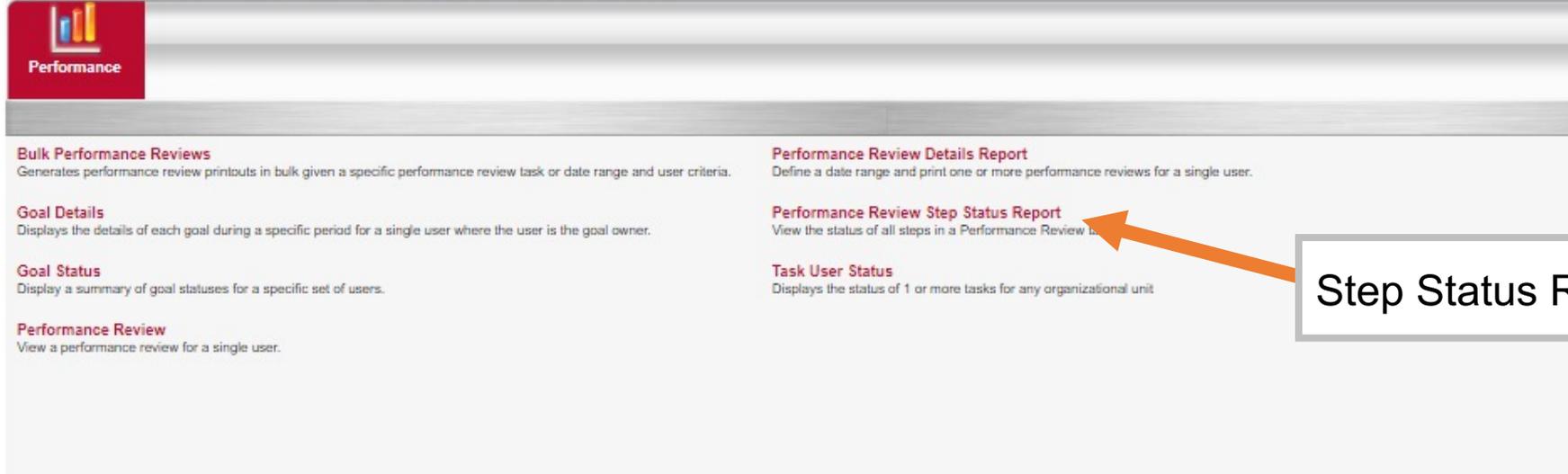
[Print Performance Review](#)

Cornerstone

1. Choose employee.
2. Choose the Review Task.
3. Report will download as a PDF that you can save or print.

## Reports

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



The screenshot shows a web interface for performance reports. At the top left, there is a red header with a bar chart icon and the word "Performance". Below this, there are several report categories listed in a grid. An orange arrow points from a callout box on the right to the "Performance Review Step Status Report" entry.

Report Category	Description
<b>Bulk Performance Reviews</b>	Generates performance review printouts in bulk given a specific performance review task or date range and user criteria.
<b>Goal Details</b>	Displays the details of each goal during a specific period for a single user where the user is the goal owner.
<b>Goal Status</b>	Display a summary of goal statuses for a specific set of users.
<b>Performance Review</b>	View a performance review for a single user.
<b>Performance Review Details Report</b>	Define a date range and print one or more performance reviews for a single user.
<b>Performance Review Step Status Report</b>	View the status of all steps in a Performance Review.
<b>Task User Status</b>	Displays the status of 1 or more tasks for any organizational unit.

Step Status Report.

# Performance review step 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 >

### Performance Review Step Status Report

**Report Criteria**  
View the status of all steps in a Performance Review task.

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

**ADVANCED FILTERS**  
Performance Review Task: [ ]  
Review Steps: Review steps will appear when a task is selected  
Display OU: None

**OUTPUT**  
Printable Version Export to Excel

**Callouts:**

- Choose user criteria. (points to the User Criteria dropdown)
- Choose the task. (points to the Performance Review Task input field)
- Choose how you want information displayed. (points to the Display OU dropdown)

### Performance Review Step Status Report

**Report Criteria**  
View the status of all steps in a Performance Review task.

**USER CRITERIA**  
User Criteria: The availability criteria that you select will only include employees who n  
Select Criteria  
All Users  
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 FILTERS**  
Performance Review Task: [ ]  
Review Steps: [ ]  
Display OU: [ ]

**OUTPUT**  
Printable Version Export to Excel

Cornerstone

**ADVANCED FILTERS**  
Performance Review Task: [ ]  
Review Steps: Review steps will appear when a task is selected  
Display OU: None

**OUTPUT**  
Printable Version Export to Excel

Cornerstone

**Dropdown Menu:**

- None
- Employment Area
- Position Class
- Cost Center
- Hiring Department
- Client Account
- Position Number
- Job Suffix
- Contract Type
- Labor Index
- Labor Account
- Supervisor
- Job Change Reason
- IPEDS Primary Function
- Primary Activity
- Employee Group

## Reports

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



### Bulk Performance Reviews

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

### Goal Details

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

### Goal Status

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

### Performance Review

View a performance review for a single user.

### Performance Review Details Report

Define a date range and print one or more performance reviews for a single user.

### Performance Review Step Status Report

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

### Task User Status

Displays the status of 1 or more tasks for any organizational unit.

Print one or more Performance Reviews for a single user.

# Performance Review Details Report

## Performance Review Details Report

### Report Criteria

Define a date range and print one or more performance reviews for a single user. You may select to print all reviews occurring during a defined date range, or only completed reviews for a defined date range. This report is asynchronous. When filtering for completed reviews only, reviews completed today will not appear in the print out as the review is not recorded yet in the data warehouse.

#### DATE FILTERS

Date Criteria:  From:  To:

1. Date.

#### USER CRITERIA

- Include Review data for inactive Users
- Include Review data for applicants, if available

User Criteria:

2. User criteria.

#### ADVANCED FILTERS

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.

#### PROCESS REPORT

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

[Process Report](#)

3. Process Report.

#### Select User

Search is limited to 1000 records only

Last Name:  First Name:  ID:  User Name:  Manager's Last Name:

Name	User ID	User Name	Manager
Lobo, Louie	louielobo123	louielobo	O'Neill, Bryan
Lobo, Lucy	lucylobo	lucylobo	Lobo, Louie

(2 Results)

### Processed Reports

Report Name	Create Date	Last Run	Output	Options
-------------	-------------	----------	--------	---------

## Contact:

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

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

