2021 Performance Evaluation Training

HR Agents Guide
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.
Make sure dates are 1/1/2020 12/31/2021.

Enter your goal.

Enter any comments.

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 jobs responsibilities as “unsuccessful”- enter comments to justify the rating.
Choose a rating for goals from the dropdown.

You are able to see how your direct report rated themselves.
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
You will see the link reappear on your tasks. Click to continue with the review.
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”.
Review the Goal Evaluation and add any comments if necessary.

Click “Save and Continue”.
After reviewing – Click “Save and Continue”.
Review and click “Save and Continue”. 
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”
"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

Click on “Employee Application”.

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 UHM ID or selecting by Level 3 Org. You can also view current active employees by entering a position code. The user can view an employee that was active during a date range specified. Depending on security, this application shows Terminated Employees, Inactive for Rehire, Employee Name Changes, HRS Employee History and HRS Fugio 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 Demographics Form
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”.
These are the Reports you will see

- Bulk Performance Review
  - Generates performance review printouts in bulk given 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
    - Displays 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
  - Defines a date range and job code 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.
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.
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

<table>
<thead>
<tr>
<th>Date Filters</th>
<th>User Criteria</th>
<th>Process Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Criteria:</td>
<td>Select</td>
<td>1. Date.</td>
</tr>
<tr>
<td>From:</td>
<td>To:</td>
<td>2. User criteria.</td>
</tr>
</tbody>
</table>
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