



Manager Job Aid

Performance Evaluation Process

Employee & Organizational Development
The University of New Mexico



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100%

PERFORMANCE EVALUATION & PLANNING
PEP ONLINE
UNMJOBS.UNM.EDU

The following steps are for a Manager completing an Employee Performance Evaluation.

Job Responsibilities Evaluation

- Once the employee has completed their Self-Evaluation you will have the task "**Complete Manager Evaluation of (employee's name)**" on your homepage of UNMJobs.



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Welcome, Louie.

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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
Enter 2018 PEP Goals	1/31/2019
Complete Self Evaluation	1/31/2019
Complete Manager Evaluation of Lucy Lobo	2/28/2019



Job Responsibilities Evaluation

- Once you click on the task you will be taken to the Overview screen.
- Click on **"Get Started"** to begin the process.

2018 Annual Performance Evaluation Options ▾

Larry Lobo
Human Resources Consultant
1/1/2018 - 12/31/2018

Lucy Lobo

0%

Overview

Welcome to UNM's new online 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: 2/27/2019
- Performance Discussion and Submission
- Employee Acknowledgement

Reopen Step **Get Started**

- You will complete the **Job Responsibilities Evaluation** first.
- For each responsibility, click on the dropdown menu to rate **"Successful"** or **"Unsuccessful."**

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

Successful

Rated: Successful Review: 2018 Annual Performance Evaluation Time: 11/8/2018 2:48 PM

Successful

Rated: Successful Review: 2018 Annual Performance Evaluation Time: 11/8/2018 2:38 PM

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

Successful

- Use the respective comment boxes to provide additional information regarding exceptional performance or to include details on any unsuccessful rating.
- Note that if you rate any job responsibility as unsuccessful, a comment is required.
- Click **"Save and Continue"** to proceed to the Goal Evaluation.

Goal Evaluation

- The next step is the **Goal Evaluation** for the 2018 goals. For each goal, use the dropdown menu to rate “**Exceptional,**” “**Successful,**” “**Not Successful.**” “**Deferred/In Progress.**”

The screenshot shows the 'Goal Evaluation' section of the 2018 Annual Performance Evaluation. A sidebar on the left contains navigation links: Overview, Job Responsibilities Ev..., Goal Evaluation (highlighted), Self-Evaluation, Manager Evaluation, 2019 Goal Planning, Performance Discussion, and Acknowledgement and... The main content area shows a progress indicator of 100% and a 'Goal Evaluation' section. It includes instructions for employees and managers, a list of goals, and a dropdown menu for rating. The selected goal is 'Increase average noise level in Pit by 15 decibels'. The rating is set to 'Exceptional'. Below the goal, there are two comments: one from Louie Lobo (Manager) and one from Lucy Lobo (Self), both rating the goal as 'Exceptional'.

- Use the comments box to add additional information or to justify a “**Not Successful**” rating.
- Click “**Save and Continue**” to proceed to the overall evaluation.

Self-Evaluation

The screenshot shows the 'Self-Evaluation' section of the 2018 Annual Performance Evaluation. A sidebar on the left contains navigation links: Overview, Job Responsibilities Ev..., Goal Evaluation, Self-Evaluation (highlighted), Manager Evaluation, 2019 Goal Planning, Performance Discussion, and Acknowledgement and... The main content area shows a progress indicator of 100% and a 'Self-Evaluation' section. It includes instructions for selecting an overall self-evaluation rating for Job Responsibilities and 2018 Goal Evaluation. The selected rating for 'Overall Job Responsibilities Rating (Self-Evaluation)' is 'Successful'. Below this, there is a section for 'Overall Goal Rating (Self-Evaluation)'.

- The Self-Evaluation screen displays the employee’s self-evaluation overall ratings.
- Click “**Save and Continue**” to proceed to the manager evaluation page and enter your overall ratings.

Manager Evaluation

- Use the dropdown menus to choose “**Successful**” or “**Not Successful**” for the overall Job Responsibilities and Goal ratings.
- Remember to use the comments box to add information or to justify a “**Not Successful**” rating.
- Click “**Save and Continue**” to proceed to 2019 Goal Planning.

The screenshot shows a web application interface for a Manager Evaluation. On the left is a vertical navigation menu with icons and labels: Overview, Job Responsibilities E..., Goal Evaluation, Self-Evaluation, **Manager Evaluation** (highlighted with a red bar), 2019 Goal Planning, Performance Discussion, and Acknowledgement an... At the top right, there is a user profile for Louie Lobo (1/1/2018 - 12/31/2018) and a circular progress indicator showing 60%. The main content area is titled "Manager Evaluation" and contains the following sections:

- A sub-header: "Select an overall rating for Job Responsibilities and 2018 Goal Evaluation. The next step is to review and complete goal planning for 2019."
- A form field: "Overall Job Responsibilities Rating (Manager)" with a dropdown menu set to "Successful".
- A form field: "Overall Goal Rating (Manager)" with a dropdown menu set to "Successful".
- A "Manager Comments" section with a rich text editor toolbar (including Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Table, and Table of Contents) and a large text area for entering comments.
- At the bottom right, there are three buttons: "Back", "Save and Exit", and "Save and Continue" (highlighted in red).

Goal Planning for 2019

- On this page, you will see your employee's proposed goals for 2019.
- To make changes to any of the proposed goals, click the arrow on the top right-hand side of the goal and choose edit. To create additional goals, click the "Add Goals" button.
- When you are finished adding/editing goals for 2019, click "**Submit**"

Employee: Use this section to develop and propose your goals for 2019. 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 2019 performance goals have been added to the system.

Take a moment to review and confirm that all of your 2019 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 2019 below. You may edit, add, or delete goals as needed. Once all of EMPLOYEE.FIRST.NAME'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.

Continue building on t-shirt cannon accuracy improvements

Additional increase of 10% over 2018 baseline.

Status: On Track
Start Date: 1/1/2019
Due Date: 12/31/2019

more...

Cancel Goal

Comments:

Back Save as Draft and Exit **Submit**

NOTE: Clicking "**Submit**" here does not actually submit your manager evaluation. The next step in the evaluation process is to schedule your performance discussion with your employee. In preparation for this, you can download a pdf version of the evaluation to review with your employee during the discussion.

Submit Review

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

Cancel **Submit**

Performance Discussion

After you have reviewed the 2019 goals for your employee, it is time to schedule the Performance Discussion. This is a great opportunity to have a meaningful conversation with your employee and make sure you both are on the same page in regards to goals and expectations. Approach this meeting as a conversation ready to listen and offer constructive feedback.

- Once this meeting has taken place, log back in to UNMJobs and click the link to "Complete Manager Evaluation of [Employee Name]."



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Cornerstone

- Click **"Get Started"** and proceed through the pages of the evaluation. You can make changes to any of your ratings or comments at this time, if necessary based on the outcome of your performance discussion with your employee.

2018 Annual Performance Evaluation Options ▾

Louie Lobo
1/1/2018 - 12/31/2018

14%

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Review Step Progression

- Self Evaluation ✓
- Manager Evaluation ✓
- Performance Discussion and Submission** ✓
Due: 2/28/2019
- Employee Acknowledgement ✓

Reopen Step **Get Started**

- When you get to the **"Performance Discussion"** page, select the date that the meeting occurred and enter any relevant comments or notes from the meeting.
- When you're finished, click **"Save and Continue."**

2018 Annual Performance Evaluation Options ▾

Louie Lobo
1/1/2018 - 12/31/2018

71%

Performance Discussion

Once the self-evaluation (if applicable) and your (manager) evaluation are completed, you and Louie Lobo should meet to review and discuss the performance evaluation and goal planning.
Using the calendar drop-down, specify the date the meeting occurred. You may use the comments area to summarize the discussion. Click "Next" to sign the evaluation and route it back to EMPLOYEE.FIRST.NAME for completion.

In Person Meeting Date:

November 2018

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Back Save and Exit **Save and Continue**

Acknowledgement and Submission

- The final step in the manager evaluation is to sign and submit.

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
Lucy Lobo Date:11/8/2018

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

Sign

Comment

B I U S Ix | **¶** **☰** **☲** **☱** **☴** **☵** **☶** **☷**

Back **Save as Draft and Exit** **Submit**

- Click the box next to- **“I acknowledge that providing my electronic approval is equivalent to signing this document....”**
- Click **“Sign”** and enter in any final comments you may have for the Performance Review.
- Once the manager submits, the employee will receive a notification that the manager evaluation is complete and the evaluation is ready for their signature. Once the employee signs the evaluation, the process is complete.