



# **The Performance Evaluation Process**

## **Manager Guide**



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# Things you can do to get ready

- Make sure your employee's goals are correct:
  - Sometimes our goals have changed throughout the year and we are unable to complete them.
  - You can add comments and edit goals throughout the year.
  - You should be discussing the progress of goals throughout the year during one-on-one's.
- You want to make sure you are evaluating the most accurate goals.
- It's best to edit a goal rather than cancel because the cancelled goals will still show up in the PEP.

## **Updating Goals Before the Self-Evaluation**



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2024 Goal Planning

Manager Evaluation

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2023 Annual Performance Evaluation

Options

Lucy Lobo

1/1/2023 - 12/31/2023

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.

Test 2023

Status : On Track

Start Date : 1/12/2023

Due Date : 12/31/2023

more...

Select

Select

Exceptional

Successful

Not Successful

Deferred/In Progress

Font

Size

A

A

Back

Save and Exit

Save and Continue

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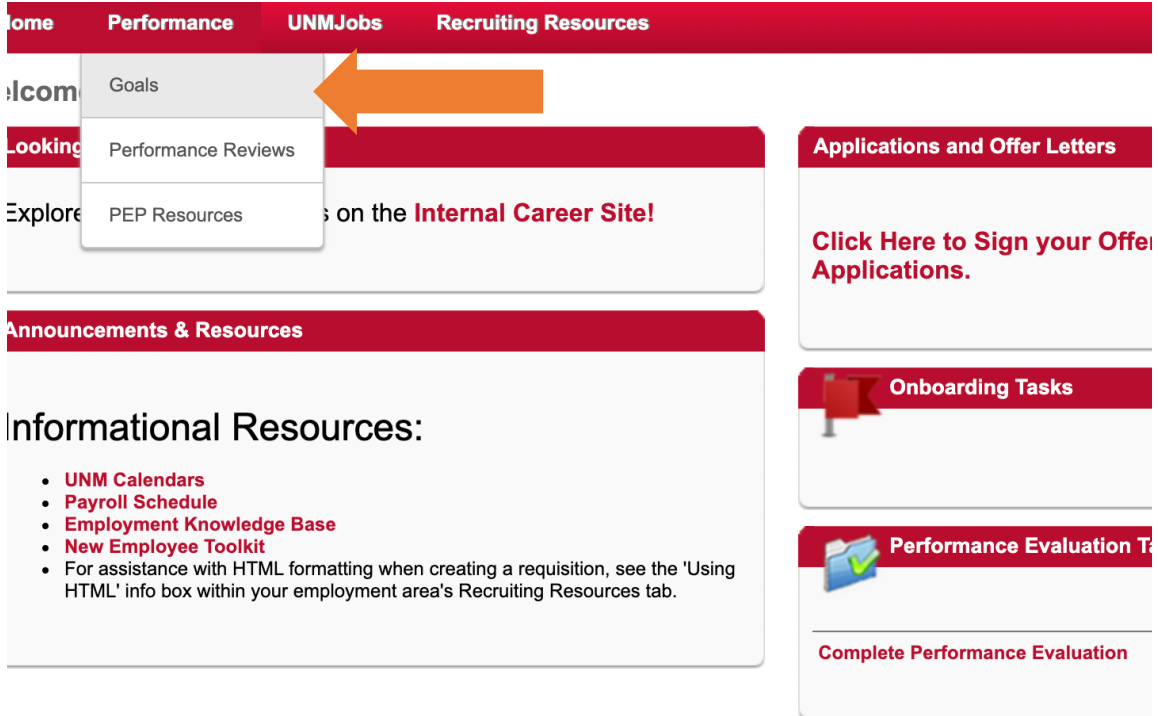
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This goal is no longer applicable. I cannot delete goals, so I need to add some comments to explain why I am cancelling the goal.



## 1. Click on Performance->Goals



The screenshot shows the top navigation bar with links: Home, Performance, UNMJobs, and Recruiting Resources. The 'Performance' dropdown menu is open, showing 'Goals', 'Performance Reviews', and 'PEP Resources'. An orange arrow points to the 'Goals' option. Below the navigation bar, there are sections for 'Applications and Offer Letters', 'Onboarding Tasks', and 'Performance Evaluation Tools'. The 'Performance Evaluation Tools' section includes a link to 'Complete Performance Evaluation'.

Home Performance UNMJobs Recruiting Resources

Goals  
Performance Reviews  
PEP Resources

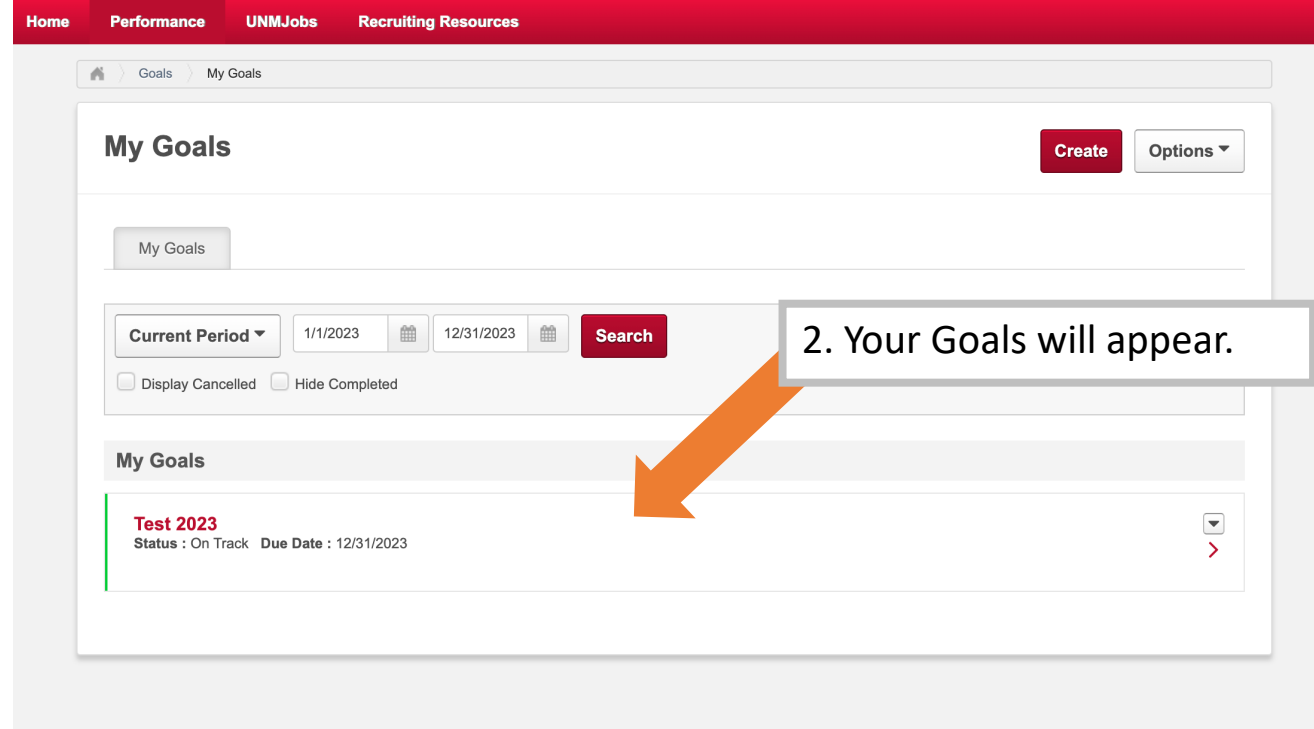
Applications and Offer Letters

Click Here to Sign your Offer Applications.

Onboarding Tasks

Performance Evaluation Tools

Complete Performance Evaluation



The screenshot shows the 'My Goals' page. At the top, there is a 'Create' button and an 'Options' dropdown. Below this, there is a 'My Goals' tab. A search bar is present with a 'Current Period' dropdown, date pickers for '1/1/2023' and '12/31/2023', and a 'Search' button. There are also checkboxes for 'Display Cancelled' and 'Hide Completed'. Below the search bar, the 'My Goals' section displays a goal for 'Test 2023' with a status of 'On Track' and a due date of '12/31/2023'. An orange arrow points from the '2. Your Goals will appear.' text box to the goal entry.

Home Performance UNMJobs Recruiting Resources

Goals My Goals

My Goals

Create Options

My Goals

Current Period 1/1/2023 12/31/2023 Search

Display Cancelled Hide Completed

My Goals

Test 2023  
Status : On Track Due Date : 12/31/2023

2. Your Goals will appear.

## My Goals

Create

Options ▾

My Goals

Current Period ▾

1/1/2023



12/31/2023



Search

☐ Display Cancelled ☐ Hide Completed

### My Goals

#### Test 2023

Status : On Track Due Date : 12/31/2023



Edit  
Copy  
Cancel  
View History

Click the dropdown and "Edit".

## Edit Goals

Options ▾

Add your goal using the form below.

All fields marked "\*" are required

Goal Name \*

Test 2023

Goal Description

B I U S I<sub>x</sub> [List Icons] ABC

Goal Description text area

Start Date

1/12/2023

Due Date \*

12/31/2023

Comments



Lucy Lobo commented 3/13/2023 11:58 AM

Test comment 2

Add Comment

Enter any relevant comments and click "Submit". If you are deferring it to a future goal- be sure to update Due date to 12/30/2023

Cancel

Submit

Home Performance UNMJobs Recruiting Resources

Goals My Goals

### My Goals

Create Options

My Goals

Current Period 1/1/2023 12/31/2023 Search

☐ Display Cancelled ☐ Hide Completed

#### My Goals

**Test 2023**  
Status : On Track Due Date : 12/31/2023

Edit  
Copy  
Cancel  
View History

In some cases, it might make more sense to cancel a goal. To do this- click the dropdown and choose "Cancel".

[Home](#)[Performance](#)[UNMJobs](#)[Recruiting Resources](#)

[Home](#) > [Goals](#) > [My Goals](#)

# My Goals

CreateOptions

My Goals

Current Period

1/1/2023

12/31/2023

Search

☒ Display Cancelled☐ Hide Completed

## My Goals

Test 2023

Status : Cancelled Due Date : 12/31/2023

>

The cancelled goal will still appear on your PEP, but you will not be required to rate it.



# **The Manager Evaluation of the Employee**

# The Manager's Role in the Evaluation

- You should be having regular one-on-one's with your employee throughout the year to discuss their performance.
- An “Unsuccessful” rating should not be a surprise to the employee- this should have been discussed in the one-on-one.
- Make sure to add comments if you gave an employee an “Unsuccessful” rating.
- You can also add comments if your employee was exceptional.



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## 2023 Annual Performance Evaluation

Options ▾

**Lucy Lobo**  
1/1/2023 - 12/31/2023

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

Manager Evaluation  
Due : 3/15/2024

Performance Discussion and Submission

Employee Acknowledgement

Reopen Step

Get Started

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

Click "Get Started" to begin.

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UNM  
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Performance Discussior

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### 2023 Annual Performance Evaluation

Options ▾

Lucy Lobo

1/1/2023 - 12/31/2023

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

Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

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

Select ▾

Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

Quality of Work: Ensures work is of proper quality; checks for accuracy.

Select ▾

Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

Initiative: Takes it upon oneself to complete regular tasks; seeks additional skills, information, and available resources to ensure high quality.

Select ▾

Choose a rating from the dropdown.

You can see how your employee rated themselves.

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Successful

**Lucy Lobo** ( Self ) Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

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 : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

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.

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### 2023 Annual Performance Evaluation

Options ▾

Lucy Lobo

1/1/2023 - 12/31/2023

20%

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Test 2023

Status : On Track

Start Date : 1/12/2023

Due Date : 12/31/2023

more...

Successful ▾

Select

Exceptional : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:13 AM

✓ Successful

Not Successful

Deferred/In Progress

Font ▾

Size ▾

A ▾ A ▾

Back

Save and Exit

Save and Continue

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Choose a rating for goals from the dropdown.

You can see how your direct report rated themselves.

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Lucy Lobo

1/1/2023 - 12/31/2023

20%

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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](#).

Test 2023

Status : On Track

Start Date : 1/12/2023

Due Date : 12/31/2023

more...

Successful

Comments :

Lucy Lobo ( Self ) Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:13 AM

B I U S x<sub>2</sub> x<sup>2</sup> I<sub>x</sub>

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Save and Exit

Save and Continue

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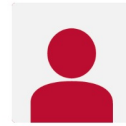
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Click "Save and Continue".

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- Goal Evaluation
- Self-Evaluation**
- Manager Evaluation
- 2024 Goal Planning
- Performance Discussion
- Acknowledgement an...

## 2023 Annual Performance Evaluation

Options ▾



**Lucy Lobo**  
1/1/2023 - 12/31/2023



### Self-Evaluation

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

#### Overall Job Responsibilities Rating (Self-Evaluation)

Successful ▾

#### Overall Goal Rating (Self-Evaluation)

Successful ▾

#### Employee Comments

Back

Save and Exit

Save and Continue

Here is how your direct report rated themselves.

You can see any comments.

Click "Save and Continue".



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Lucy Lobo

1/1/2023 - 12/31/2023

80%

2024 Goal Planning

Add Goals

**Employee:** Use this section to develop and propose your goals for the next year. 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 new goals have been added to the system.

Take a moment to review and confirm that all of your new 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 the coming year 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.

Crowd Wave

New -- Please Review

Status : On Track

Start Date : 1/1/2024

Due Date : 12/31/2024

more...

Comments :

B I U S x x I x

Font

Size

A A

Back

Save and Exit

Submit

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

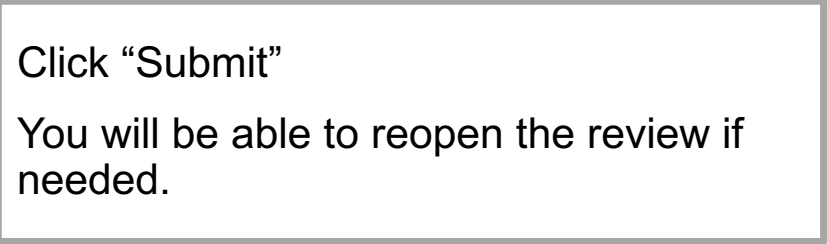
Enter any comments related to the goal.

Click "Submit".

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# **Performance Discussion Step**

# Guidelines for the Performance Discussion

- *Now that the performance evaluation has been submitted, the next step, the Performance Discussion is scheduled*
- *The Performance Discussion is a meaningful conversation between the manager and employee that will encourage growth and learning*
- *It makes mutual expectations clear and sets goals for both parties*
- *It maintains open lines of communication*



# The Performance Discussion

- Shift your mindset from evaluator to coach.
- You should be having “regular” one on ones with your direct reports.
- Listen with curiosity instead of certainty.
- Ask a lot of questions
  - Clarifying to deepen understanding – “tell me more about\_\_\_\_\_”
  - Open ended to explore options- “What have you done so far about\_\_\_\_\_?”
  - Insightful to generate creative thinking- “Think about a time when\_\_\_\_\_was working, how can we get back to that?”



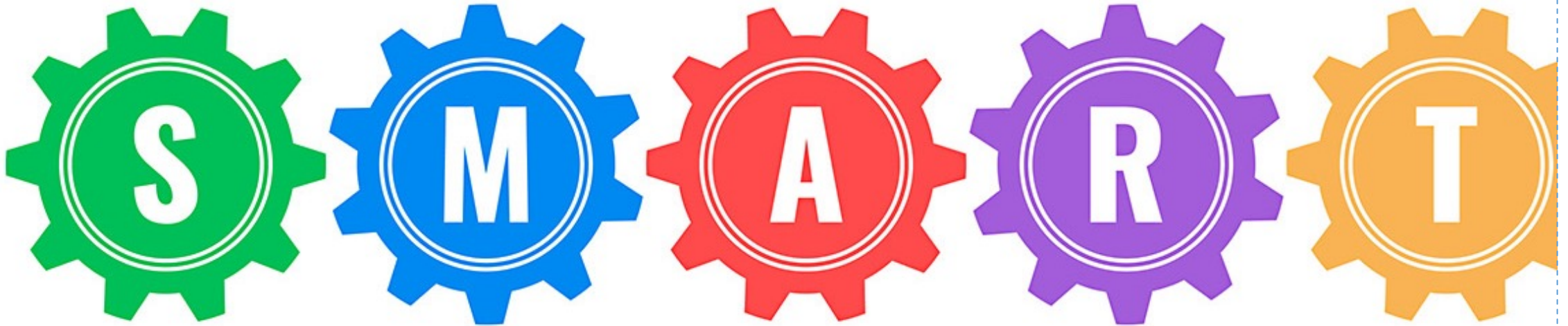
# Effective Questions to Ask During the Discussion

Asking the right questions is crucial- these questions can help keep you focused on the topics that are important for your employee's success.

- What accomplishments are you most proud of this year?
- What goals have you thought about?
- What development goals would you like to set?
- What obstacles are standing in your way if any?
- What impact has your performance had on the team? Organization?
- How can I improve as a manager? What support can I offer you?

# Guide to SMART Goals

- Specific
- Measurable
- Achievable
- Results-Focused
- Time Bound





- Specific- your goal should be clear and specific.



- It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines.



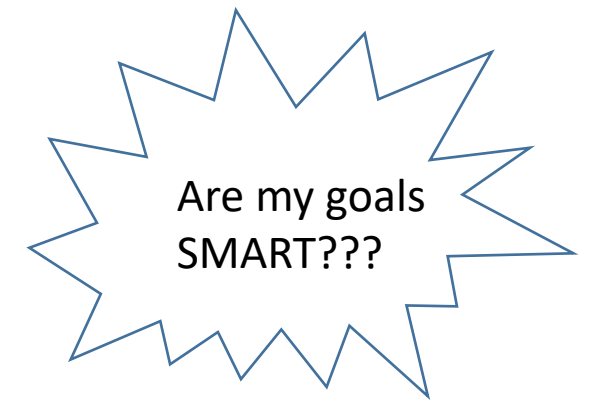
- Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you closer to it..



- Your goals need to measure actual outputs or results, not activities. These results could include: products, deliverables and accomplishments



- Every goal needs a target date, so that you have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your longer-term goals.



# Mindset of Feedback

## Common Mindset

- I give feedback so I can fix people's problems.

## Effective Mindset

- I give and seek feedback to elevate other and the team.





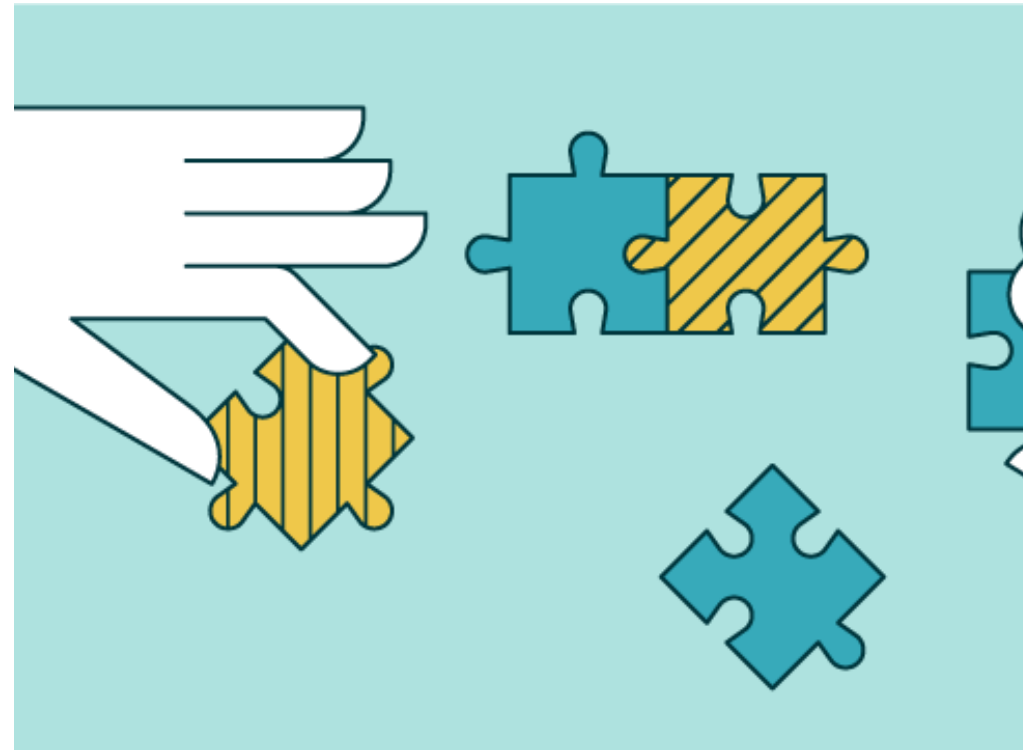
# Two Types of Feedback



- **Reinforcing**
  - Highlights behaviors
  - Builds confidence
  - Inspires team members
  - Creates a culture of respect
- **Redirecting**
  - Raises awareness
  - Highlights impact
  - Clarifies expected behaviors
  - Communicates belief

# What is Effective Feedback?

- Spirit of improvement
- Moves an individual or team forward
- Nonjudgmental
- Continuous and in the moment
- Honest and conversational
- Inquisitive
- Specific
- Descriptive not critical
- Mainly focused on building strengths



# Feedback guidelines

- Clarify the intent
  - Make sure your intent is to help the other person learn and grow. If your intent is not genuine, reconsider giving feedback.
- Share specific observations
  - Lay out the fact of what you've seen and the behaviors you have observed. Use "I" messages to do this.  
"I've observed that \_\_\_\_\_"  
"It appears to me \_\_\_\_\_"

# Feedback guidelines

- Describe the impact
  - State the impact on results. What outcomes has this behavior produced?
- Ask for/offer suggestions as needed
  - Explore ways to either repeat positive behaviors (reinforcing) or adopt new behaviors (redirecting).

# Feedback Cautions

- Don't use generic language
  - Vague or extreme statements may sound insincere.
- Don't make assumptions
  - Feedback that's based on wrong assumptions is not valid. Ensure you have the facts about a situation to give accurate feedback.



Welcome, Louie.

**Looking for a Job?**

Explore Career Opportunities on the [Internal Career Site!](#)

**Applications and Offer Letters**

[Click Here to Sign your Offer Letter or Check the Status of your Applications.](#)

**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](#)

**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
<a href="#">Complete Manager Evaluation of Lucy Lobo</a>	3/28/2024

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



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## 2023 Annual Performance Evaluation

Options ▾

**Lucy Lobo**  
1/1/2023 - 12/31/2023

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.

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[Job aids, FAQs, and additional materials to help you navigate this process are available by clicking here.](#)

#### Review Step Progression

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**Performance Discussion and Submission**  
Due : 3/28/2024

Employee Acknowledgement

Reopen Step

**Get Started**

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

Click "Get Started"

# Print the Review before the Performance Discussion

## 2023 Annual Performance Evaluation



**Lucy Lobo**

1/1/2023 - 12/31/2023

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.



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0%

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Successful

Lucy Lobo ( Self ) Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

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

Successful

Lucy Lobo ( Self ) Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

Quality of Work: Ensures work is of proper quality; checks for accuracy.

Successful

Lucy Lobo ( Self ) Rated : Successful Review : 2023 Annual Performance Evaluation Time : 11/21/2023 9:09 AM

Initiative: Takes it upon oneself to complete regular tasks; seeks additional skills, information, and available

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

Comments:

B I U S X \* I \_

Font

Size

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

Comments:

B I U S X \* I \_

Font

Size

Back

Save and Exit

Save and Continue

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Version: 23.3.0.155

Review the job responsibilities rating.

Enter any comments if you needed to.

Click "Save and Continue".

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Test 2023

Status : On Track

Start Date : 1/12/2023

Due Date : 12/31/2023

more...

Select

Comments :

Lucy Lobo ( Self )

Rated : Successful

Review : 2023 Annual Performance Evaluation

Time : 11/21/2023 9:13 AM

B I U S x x I x

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".

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## 2023 Annual Performance Evaluation

Options ▾



**Lucy Lobo**  
1/1/2023 - 12/31/2023



### Self-Evaluation

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

#### 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”.

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2023 Annual Performance Evaluation

Options

Lucy Lobo

1/1/2023 - 12/31/2023

43%

Manager Evaluation

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

Overall Job Responsibilities Rating (Manager)

Successful

Overall Goal Rating (Manager)

Successful

Manager Comments

Comments:

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Save and Exit

Save and Continue

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Review and click “Save and Continue”.

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Lucy Lobo

1/1/2023 - 12/31/2023

57%

### 2024 Goal Planning

Add Goals

**Employee:** Use this section to develop and propose your goals for the next year. 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 new goals have been added to the system.

Take a moment to review and confirm that all of your new 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 the coming year 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.

Crowd Wave

New - Please Review

Status : On Track

Start Date : 1/1/2024

Due Date : 12/31/2024

more...

Comments :

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Save and Exit

Save and Continue

Your direct report will have entered their 2022 goals during their self-evaluation.

Enter any comments related to the goal.

Click "Save and Continue".

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**Lucy Lobo**  
1/1/2023 - 12/31/2023

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 occurred. Click "Save and Continue" to sign the evaluation and discussion.

In Person Meeting Date:

March 2024

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	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
31	1	2	3	4	5	6

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Save and Exit

Save and Continue

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Choose the meeting date from the dropdown calendar.

Enter comments from the meeting.

Click "Save and Continue"

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Options ▾

Lucy Lobo

1/1/2023 - 12/31/2023

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.

Sign

Comment

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Save and Exit

Submit

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The diagram illustrates the workflow for completing the 2023 Annual Performance Evaluation. It features three orange arrows pointing to specific elements on the page:

- An arrow points from a box labeled **"X" here** to the **Acknowledgement and Submission** section in the left-hand navigation menu.
- An arrow points from a box labeled **Click "Sign"** to the **Sign** button located below the manager's signature area.
- An arrow points from a box labeled **Enter any comments if necessary and click "Submit"** to the **Submit** button at the bottom right of the form.

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Home Performance UNMJobs Reports Recruiting

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

### 2023 Annual Performance Evaluation

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Manager Evaluation

**Lucy Lobo**  
1/1/2023 - 12/31/2023

86%

**Acknowledgement and Submission**

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



# Trouble Shooting

# Common Issues- You don't get your employee's evaluation

- Make sure you check that you have your correct direct reports. If you do not see someone you supervise under you- contact your HR Consultant or PEP
- If the Supervisor is not correct- you will not receive the employee evaluation

# Reopen a step

- You may need to reopen a step for several reasons:
  - Employee needs to enter more goals.
  - Employee wants to add comments to their evaluation.
  - Employee wants to add information after the planning and discussion meeting.

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## Overview

Welcome to UNM's 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	✓
✓	Performance Discussion and Submission Due: 3/27/2022	✓
✓	Employee Acknowledgement	✓

Reopen Step

Get Started

After you click on "Complete Manager Evaluation" click on "Reopen Step" from the Overview Screen.

## Reopen Previous Review Step

You may only reopen 1 review step at a time. Only steps that have a status of Complete or Past Due will appear.

☐ Self Evaluation

Comment for reviewer

Cancel

Save

Choose step to reopen- You can only reopen one step at a time.

You must put in comments explaining why you are reopening the step.

The reopened step will now appear on the users UNM Jobs homepage.

✓ Manager Evaluation ✓

Due: 3/13/2020

✓ Performance Discussion and Submission ✓

# Adding a Co-planner

- **What is it?**

- A way for managers to share the ability to rate or comment on their employee's performance evaluation with another person.
  - An employee may be very new in a department and it would be more appropriate for their previous manager to complete part of the review.
  - A manager could be away from the office on sabbatical.
  - An employee may report to a retired staff member or someone who is not on campus most of the time.
- Only one person can review a section on the review and employees and other planners can see who made which comments. So it is a good idea to maintain open communication with other co-planners to decide who will do which step.

# Adding a Co-Planner

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	1/31/2022
Complete Manager Evaluation of Lucy Lobo	3/27/2022

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](#)



Click on the employee evaluation.

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## 2021 Annual Performance Evaluation



Lucy Lobo

1/1/2021 - 12/31/2021

Changes need to be submitted to be finalized

### 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

**\*This step has been reopened.**  
You must complete this step before advancing to the next step.

✓

Self Evaluation

✓

✓

Manager Evaluation

✓

✓

Performance Discussion and Submission

Due: 3/27/2022

✓

✓

Employee Acknowledgement

✓

Get Started

Options

Add Co-Planners  
Attachments  
Print Review  
Print Reviewee Version

Click on the "Options" button and choose "Add Co-Planners".

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Lucy Lobo

1/1/2020 - 12/31/2020

100%

Changes need to be submitted to be finalized

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

\*This step has been reopened.  
You must complete this step before advancing to the next step.

Self Evaluation

Manager Evaluation  
Due: 2/15/2021

Performance Discussion and Submission

Employee Acknowledgement

Search for the person you wish to add as the Co-Planner and click "Save".

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# My employee refuses to sign the review

- Signing is not agreement.
- Signing signifies that you were given the opportunity.
- If an employee still will not sign and acknowledge- contact their HR consultant.

# **Standard Reports**

# Bulk Performance Reviews

You can print/download up to 500 performance evaluation.

## 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.

# Bulk Report

**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)

[Process Report](#)

**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

# Performance Review for single User

The screenshot shows the 'Reports' section of the PEP ONLINE system. A red navigation bar at the top contains links for Home, Performance, UNMJobs, Reports, and Recruiting Resources. Below the navigation bar, a yellow banner displays a system update notice: '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.' The 'Reports' section is titled 'Reports' and includes a sub-header: 'Click on a report category to view those reports. You may search for any reports by title or description.' A sidebar on the left, under the 'Performance' category, lists several report options. An orange arrow points from a white box labeled 'Performance Review' to the 'Performance Review' link in the sidebar.

**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.
- 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.

# Performance Review report

**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.

# Performance Review Step Status Report

## 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 square icon with a bar chart and the word "Performance" below it. Below this is a list of report categories. An orange arrow points from a white box labeled "Step Status Report" to the "Performance Review Step Status Report" entry in the list.

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 task.
<b>Task User Status</b>	Displays the status of 1 or more tasks for any organizational unit.



# 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 Louie Lobo)

[Select Criteria](#)

ADVANCED FILTERS

Performance Review Task:

Review Steps:

Display OU:

OUTPUT

[Printable Version](#) [Export to Excel](#)

Choose user criteria

Choose the task

Choose how you want  
information displayed

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 n

[Select Criteria](#)

ADVANCED FILTERS

Performance Review Task:

Review Steps:

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**Cornerstone**

ADVANCED FILTERS

Performance Review Task:

Review Steps:

Display OU:

OUTPUT

[Printable Version](#) [Export to Excel](#)

**Cornerstone**

# Performance Review Details Report

## 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: Select From: 1/1/2019 To: 12/31/2019

1. Date

#### USER CRITERIA

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

User Criteria: Select user

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:

Search

(2 Results)

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

Cancel

### Processed Reports

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

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

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