



Employee 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 Employee completing an Performance Evaluation Process.

Goals

1 First log into [UNM Jobs](#) and click on the **"Enter your 2018 PEP Goals"** Link on the homepage. This will be the only time you will be entering in the goals before actually doing the Self-Evaluation.

(These are the goals you and your manager decided up earlier this year)

The screenshot shows the UNM Jobs homepage. At the top, the UNM logo and 'THE UNIVERSITY OF NEW MEXICO' are displayed. Below the logo is a navigation bar with links for Home, Performance, UNMJobs, and Recruiting Resources. The main content area is divided into several sections: 'Looking for a Job?' with links for Staff & Faculty and Students; 'Announcements & Resources'; and 'Informational Resources' with a list of links including UNM Calendars, Payroll Schedule, Employment Knowledge Base, and New Employees Toolkit. On the right side, there are two task panels: 'Onboarding Tasks' showing 'No Pending Actions' and 'Performance Evaluation Tasks' showing 'Enter 2018 PEP Goals' with a due date of 1/31/2019. An orange arrow points to the 'Enter 2018 PEP Goals' link. The footer features the Cornerstone logo.

Goals

2 This will take you to the task "Overview" screen.
Click on "Get Started" button to start adding goals

Enter Your 2018 PEP Goals Options ▾

Overview Enter 2018 PEP Goals

Lucy Lobo
1/1/2018 - 12/31/2018

0%

Changes need to be submitted to be finalized

Overview

Welcome to UNM's new online performance evaluation process!
To get started, we're going to enter the goals from last year's paper performance evaluation. Click the "get started" button below, and you'll be prompted to enter your previously approved goals into the system, which will serve as the basis for your 2018 performance evaluation.
Visit EOD's website to access job aids, FAQs, and other helpful information for this process!

Review Step Progression

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

Enter 2018 PEP Goals Due: 1/31/2019

Get Started

3 Click on "Add Goals"

Enter Your 2018 PEP Goals Options ▾

Overview Enter 2018 PEP Goals

Lucy Lobo
1/1/2018 - 12/31/2018

0%

Changes need to be submitted to be finalized

Enter 2018 PEP Goals Add Goals

Start by clicking the 'Add Goals' button. Enter a title and description for your first goal, then click 'Save'. Continue adding goals until all 2018 performance goals have been added to the system. If you need to change anything after you've saved a goal, you can do that by clicking the down arrow to the right of the goal's title and selecting 'Edit'.
Take a moment to review and confirm that all of your 2018 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.
If you participated in last year's pilot process, we've included the proposed goals from that review below. You can review and edit any of these goals as needed. If they look good, go ahead and click Submit.
Visit EOD's website to view a Job Aid for this process.

Goals

4 Enter your first goal. Make sure the start dates and due dates are **1/1/2018** and **12/31/2018**.

Enter the Goal Name and any description if necessary.

Click **Save** when finished.

Create Goals

Add your goal using the form below.

All fields marked "*" are required

Goal Name *

Goal Name

Goal Description

B I U S I_x i= :≡ ≡≡ ≡≡ ≡≡ ABC

Start Date 1/1/2018 Due Date * 12/31/2018

Cancel Save

5

Once you click **Save** you will see your goal on the Enter 2018 PEP Goals page. Continue to click the "add goals" button until you've entered all of your goals.

Once all of your 2018 goals have been added, click **Submit**.

6

Once you click **Submit,** you will see the following screen.

Don't worry, you can still edit your goals after submission.

Submit Review

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

Cancel Submit

edit any of these goals as needed. If they look good, go ahead and click Submit.

Goals

- 7 Your goals are always available to confirm submission or make modifications by navigating to: **Performance->Goals** on your UNM Jobs homepage.

Home Performance **UNMJobs** Recruiting Resources

Welcome Goals

Looking for Performance Reviews

Staff & Faculty: Search for jobs in the **CAREER CENTER!**
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.



- 8 On your **My Goals** page, you'll notice that goals that have been successfully submitted and are active are highlighted by a **green stripe** on the left side. You'll also notice the same drop-down arrow as before, which allows you to edit, copy, cancel, or view a history of changes made to each goal.

Goals > My Goals

My Goals Create Options

My Goals

Current Period 1/1/2018 12/31/2018 Search

Display Cancelled Hide Completed

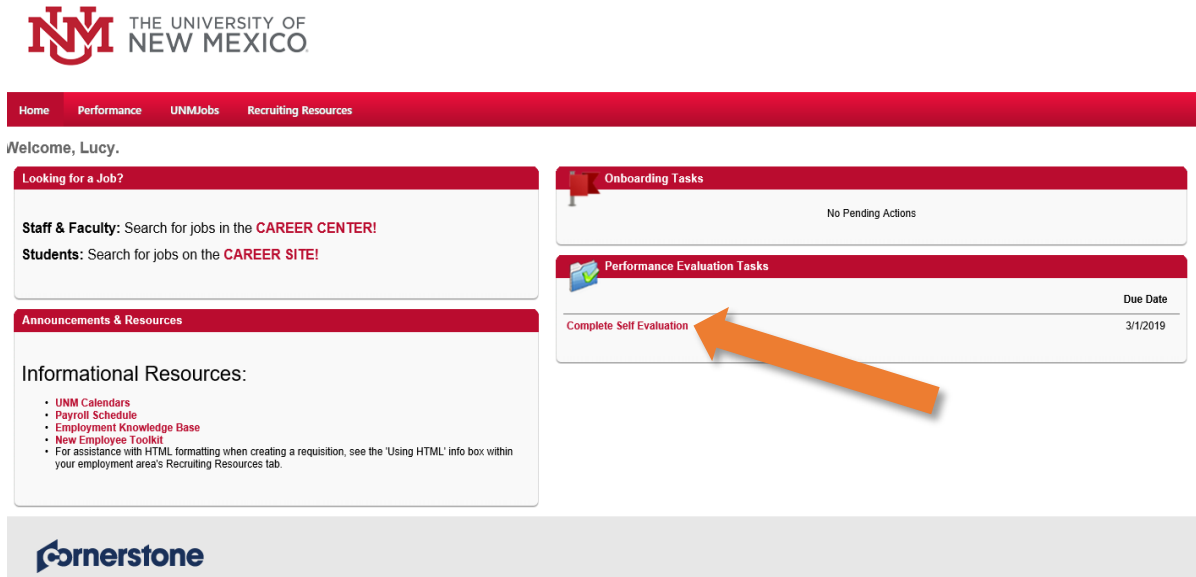
My Goals

- Increase average noise level in Pit by 15 decibels**
Status: On Track Due Date: 12/31/2018
- Increase sales of hot dogs by 15% at all lobo basketball and football games**
Status: On Track Due Date: 12/31/2018
- Increase t-shirt cannon accuracy by 25%**
Status: On Track Due Date: 12/31/2018

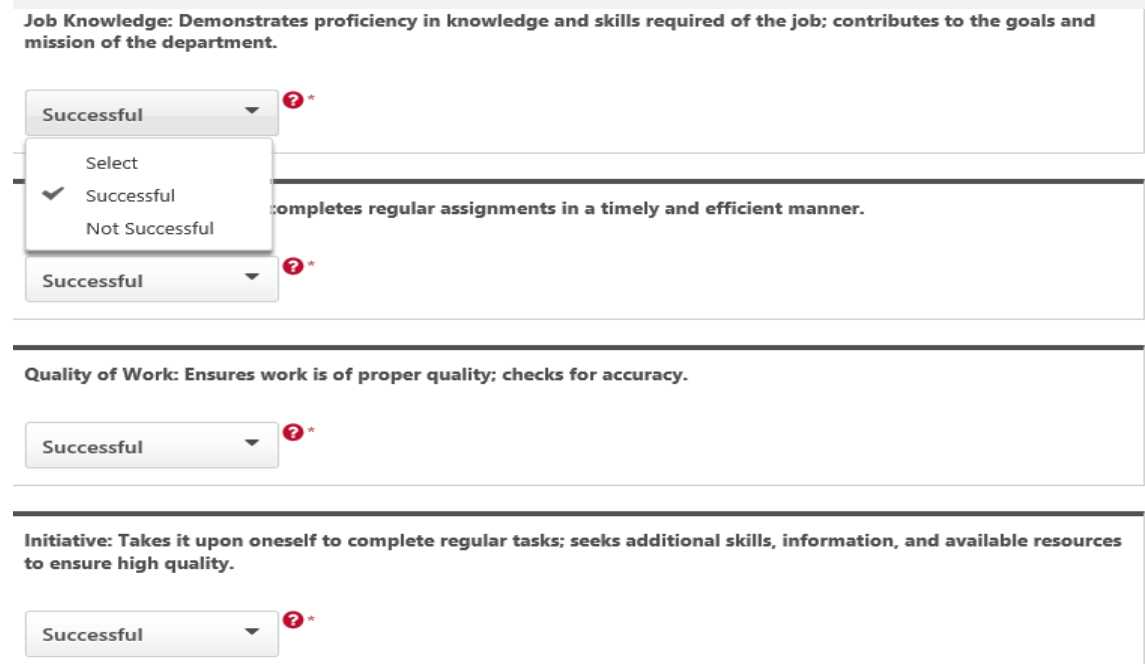
Edit
Copy
Cancel
View History

Self-Evaluation

1 The second part of the Performance Evaluation Process is the Self-Evaluation. Once your goals are submitted you will be assigned the task on your UNM Jobs homepage to **“Complete Self- Evaluation.”**



2 Use the dropdown menu and select **“Successful”** or **“Unsuccessful”** for each job responsibility. You can use the comment boxes to indicate exceptional performance in any job responsibility, as well as to provide additional detail on any “Unsuccessful” rating.



Click **“Submit”** and you will be taken to the Goal Evaluation.

Goal Evaluation

3

Before beginning this step, check to confirm that all of your 2018 goals are displayed on this page. If you do not see any goals, or need to make edits or additions, click "Save and Exit" and proceed to modify your goals.

If the listing of goals is correct, you're ready to proceed with your evaluation. For each goal, select a rating from the drop-down menu. Use the "Comments" box to enter information in support of the selected rating. Once all goals have been rated, click "Save and Continue."

Self-Evaluation

4

After completing your Job and Goal Evaluation, you will be prompted to select your overall ratings for Job Responsibilities and Goals.

Use the drop-down menus on this page to select overall ratings for Job Responsibilities and Goals. You can use the Employee Comments box to enter any general comments you would like included in the evaluation. When you have selected both ratings, click "Save and Continue" to proceed to the next step, 2019 Goal Planning.

The screenshot shows a web application interface for "Goal Evaluation". The browser address bar contains the URL: /ser/ReviewSection&s=18&t=33&r=1&tu=116597&u=142445&ret=%2FPEPM%2FReviews%2FUserReview.aspx. The page title is "Goal Evaluation".

On the left is a navigation sidebar with the following items: Overview, Job Responsibilities Ev..., Goal Evaluation (highlighted with a red checkmark), Self-Evaluation, 2019 Goal Planning, and Acknowledgement and....

The main content area contains instructions for both Employee and Manager. The Employee instruction says: "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." The Manager instruction says: "Complete your evaluation of each of Bonnie Minkus-Holmes'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."

The main goal being evaluated is "increase efficiency 10%". It has a status of "On Track", a start date of "11/19/2018", and a due date of "12/31/2018". Below the goal name is a dropdown menu currently set to "Successful".

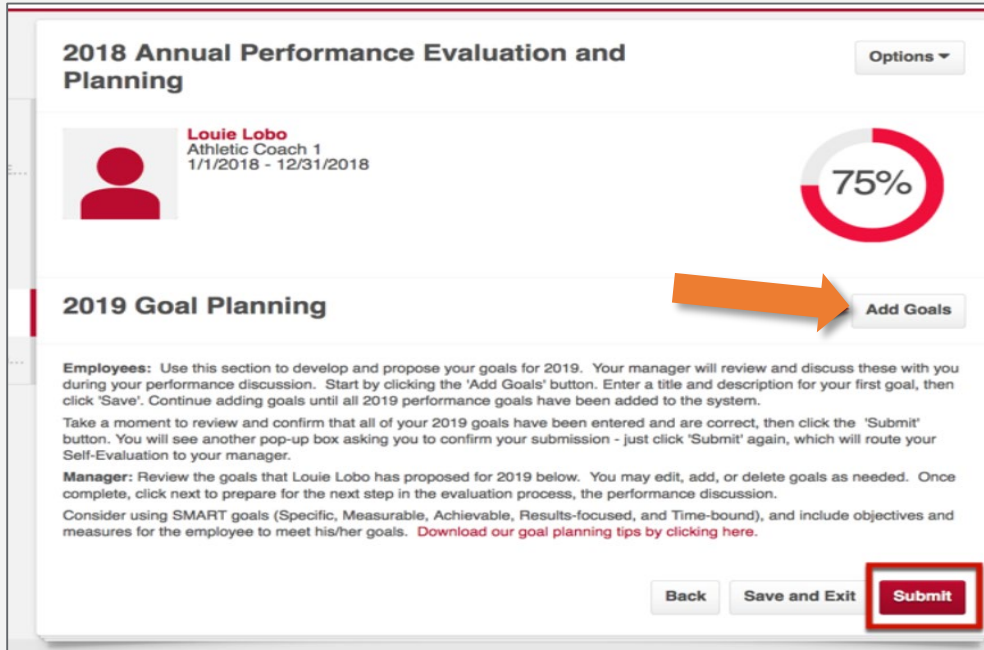
Below the dropdown is a "Comments:" section with a rich text editor toolbar (bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, font color, background color) and a large text area for entering comments.

At the bottom right of the page are three buttons: "Back", "Save and Exit", and "Save and Continue". An orange arrow points to the "Save and Continue" button.

NOTE: Before entering your 2019 goals, you should have met with your manager and discussed goals for the coming year before you complete this step.

2019 Goal Planning

5



2018 Annual Performance Evaluation and Planning Options ▾

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

75%

2019 Goal Planning Add Goals

Employees: 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 Louie Lobo has proposed for 2019 below. You may edit, add, or delete goals as needed. Once complete, click next to prepare for the next step in the evaluation process, the performance discussion. Consider using SMART goals (Specific, Measurable, Achievable, Results-focused, and Time-bound), and include objectives and measures for the employee to meet his/her goals. [Download our goal planning tips by clicking here.](#)

Back Save and Exit **Submit**

- The final step in the self evaluation process is to begin goal planning for 2019.
- Use the “Add Goals” button on this page to create proposed goals for 2019. Continue clicking Add Goals until all of your goals have been created.
- When all of your 2019 goals have been created, click “Submit” to complete your evaluation.
- Once submitted, your self-evaluation will route to your manager for review.

Performance Discussion and Acknowledgement

6

Once your manager completes their Manager Evaluation, they will schedule the **Performance Discussion**. After this meeting, your manager will finalize and electronically sign the review. You will receive an email notification once your manager signs the evaluation and it is now ready for your signature.

At this step, you will see a link on your homepage to complete your performance evaluation. Click "Get Started" to begin the process.

The screenshot shows a user interface for a performance evaluation system. On the left is a vertical navigation menu with five items: 'Overview' (selected), 'Job Responsibilities Ev...', 'Goal Evaluation', 'Self-Evaluation', and '2019 Goal Planning'. Below these is a partially visible 'Acknowledgement and...' item. The main content area features a header for 'Louie Lobo' with the period '1/1/2018 - 12/31/2018' and a circular progress indicator showing '80%'. Below the header is an 'Overview' section with a welcome message and instructions. A 'Review Step Progression' section lists four steps: 'Self Evaluation', 'Manager Evaluation', 'Performance Discussion and Submission', and 'Employee Acknowledgement' (which is highlighted with a red border and includes a 'Due: 3/1/2019' date). A 'Get Started' button is located in the bottom right corner.

Performance Discussion and Acknowledgement

7

You will have the opportunity to click through the entire evaluation and review the final version prior to signing. To sign, simply check the box next to Employee and click sign. You will see your name and a date stamp to confirm you successfully signed the review.

Once you have signed the review (1) and entered comments, click **“Submit&Sign”** (2) to complete the evaluation process.

Then **“Submit”** to complete the process.

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

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

Manager

Kevin Stevenson Date:11/21/2018

Comment

B I U S I_x | | | | | ABC

Back Save and Exit Submit

Refer to the FAQ's for more information on commonly asked questions