



The Performance Evaluation Process



Employee Guide



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Things you can do to get ready

- Make sure your goals are correct here:
 - 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-ones.
- 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

- Overview
- Job Responsibilities ...
- Goal Evaluation
- Self-Evaluation
- 2025 Goal Planning
- Manager Evaluation
- Performance Discussion
- Acknowledgement an...

2024 Annual Performance Evaluation

Options ▾



Lucy Lobo
1/1/2024 - 12/31/2024



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 Crowd Wave Participation

Increase Crowd Wave Participation at the Pit.

Status : On Track
Start Date : 11/7/2024
Due Date : 12/31/2024
[more...](#)

Select

Comments :

B I U S x₂ x² I_x **Font** **Size** **A** **A**

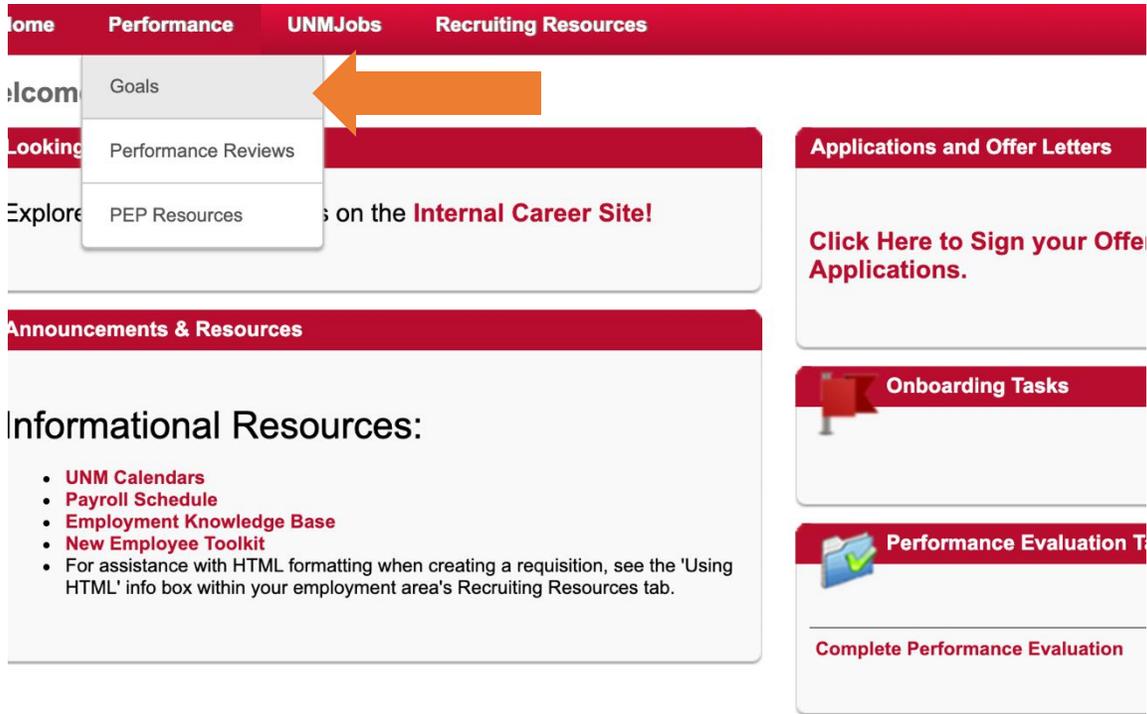
← → ✂ 📄 🗑 📧 📧

Back Save and Exit Save and Continue

This goal is no longer applicable.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



Home Performance UNMJobs Recruiting Resources

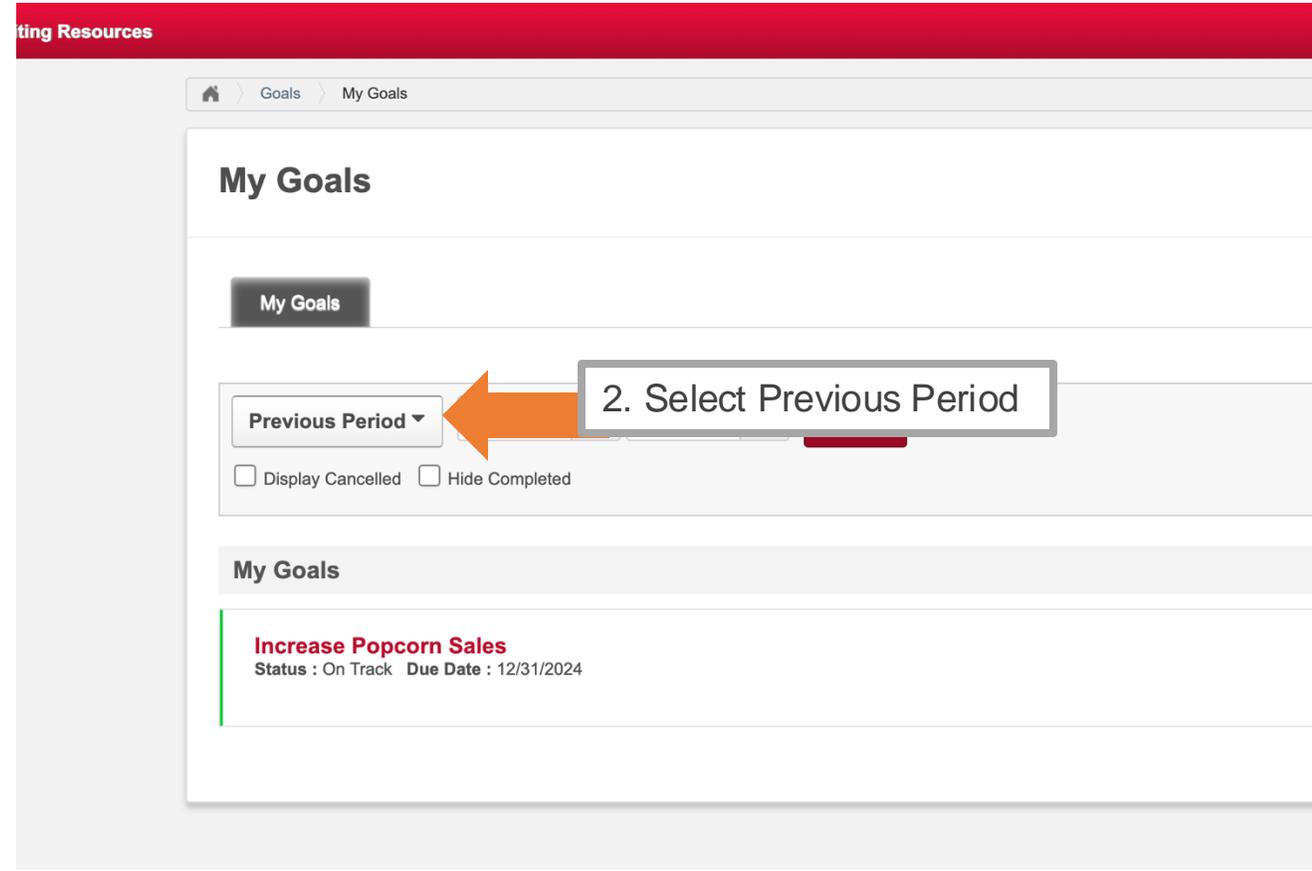
Goals
Performance Reviews
PEP Resources

Applications and Offer Letters
Click Here to Sign your Offer Applications.

Onboarding Tasks

Performance Evaluation Toolkit
Complete Performance Evaluation

- 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.



My Goals

Previous Period ▾

Display Cancelled Hide Completed

My Goals

Increase Popcorn Sales
Status : On Track Due Date : 12/31/2024

My Goals

Create Options

My Goals

Previous Period 1/1/2024 12/31/2024 Search

Display Cancelled Hide Completed

My Goals

- Increase Crowd Wave Participation**
Status : On Track Due Date : 12/31/2024
- Increase Popcorn Sales**
Status : On Track Due Date : 12/31/2024

Click the dropdown and "Edit".

- Edit
- Cancel
- Advance
- View History

Edit Goals

Options ▾

Add your goal using the form below.

All fields marked "*" are required

Goal Name *

Increase Crowd Wave Participation

Goal Description

B I U S I_x [List Icons] [ABC]

Increase Crowd Wave Participation at the Pit.

Start Date

11/7/2024 [Calendar Icon]

Due Date *

12/31/2024 [Calendar Icon]

Comments

[Add Comment](#)

Cancel

Submit

Enter any relevant comments and click "Submit". If you are deferring it to a future goal- be sure to update Due date to 12/30/2024

My Goals

Create

Options ▾

My Goals

Previous Period ▾

1/1/2024



12/31/2024



Search

Display Cancelled Hide Completed

My Goals

Increase Crowd Wave Participation

Status : On Track Due Date : 12/31/2024



- Edit
- Cancel
- Advance
- View History

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

Increase Popcorn Sales

Status : On Track Due Date : 12/31/2024

My Goals

Create

Options

My Goals

Previous Period

1/1/2024



12/31/2024



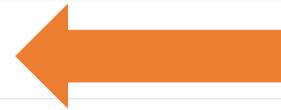
Search

Display Cancelled Hide Completed

My Goals

Increase Crowd Wave Participation

Status : Cancelled Due Date : 12/31/2024



Increase Popcorn Sales

Status : Cancelled Due Date : 12/31/2024



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

The Self-Evaluation

Home Performance UNMJobs Recruiting Resources

2024 Annual Performance Evaluation

Options ▾

Lucy Lobo
1/1/2024 - 12/31/2024

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: 1/31/2025
- Manager Evaluation
- Performance Discussion and Submission
- Employee Acknowledgement

Get Started

cornerstone

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Left sidebar shows the tasks you have completed.



- Overview
- Job Responsibilities ...
- Goal Evaluation
- Self-Evaluation
- 2025 Goal Planning
- Manager Evaluation
- Performance Discussion
- Acknowledgement an...

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

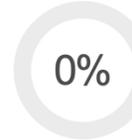


2024 Annual Performance Evaluation

Options ▾



Lucy Lobo
1/1/2024 - 12/31/2024



- Overview
- Job Responsibilities ...**
- Goal Evaluation
- Self-Evaluation
- 2025 Goal Planning
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- Acknowledgement an...

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.

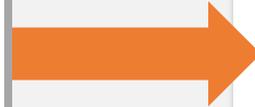
Select ▾ ? *

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.



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

Supervisor Responsibility: Did employee share their Engagement Survey results with their team? If employee is not a supervisor, please choose "successful."

Successful

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

Comments:

Rich text editor with toolbar (B, I, U, S, x, x², I, x) and a large text area for comments.

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

Comments:

Rich text editor with toolbar (B, I, U, S, x, x², I, x) and a large text area for comments.

Back Save and Exit Save and Continue

- 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

2024 Annual Performance Evaluation

Options ▾

Lucy Lobo
1/1/2024 - 12/31/2024

25%

- Overview
- Job Responsibilities ...
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- Self-Evaluation
- 2025 Goal Planning
- Manager Evaluation
- Performance Discussion
- Acknowledgement an...

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 Crowd Wave Participation

Increase Crowd Wave Participation at the Pit.

Status : On Track
Start Date : 11/7/2024
Due Date : 12/31/2024
more...

Select ▾ ⓘ

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

Font ▾ Size ▾ A- A+

Back Save and Exit Save and Continue

Version: 24.3.0.107
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- 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”.

2024 Annual Performance Evaluation

Options ▾



Lucy Lobo
1/1/2024 - 12/31/2024



- Overview
- Job Responsibilities ...
- Goal Evaluation
- Self-Evaluation
- 2025 Goal Planning**
- Manager Evaluation
- Performance Discussion
- Acknowledgement an...

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.

Back Save and Exit **Submit**

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.

Create Goals

Add your goal using the form below.

All fields marked "*" are required

Goal Name *

Enter your goal.

Goal Description

B I U S Ix [List Icon] [Table Icon] [Link Icon] [Image Icon] [ABC Icon]

Enter any comments.

Start Date

Due Date *

Make sure dates are 1/1/2024 - 12/31/2024.

Cancel

Save

Click "Save".

- Overview
- Job Responsibilities ...
- Goal Evaluation
- Self-Evaluation
- 2025 Goal Planning**
- Manager Evaluation
- Performance Discussion
- Acknowledgement an...

2024 Annual Performance Evaluation

Options ▾

Lucy Lobo
1/1/2024 - 12/31/2024



2025 Goal Planning

Add Goals

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Visit the PEP website for job aids and additional information on the remaining steps in the process.

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.

Increase Popcorn Sales

New – Please Review

Increase Popcorn Sales

Status : On Track
Start Date : 1/1/2025
Due Date : 12/31/2025
[more...](#)

Comments :

B I U S x² x³ I_x [Rich Text Editor Icons] Font Size A+ A-

Back Save and Exit **Submit**

Click "Submit" once you have entered in ALL your future goals.



Submit Review

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

Cancel Submit

Lucy Lobo
1/1/2024 - 12/31/2024

100%

2025 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.

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Visit the PEP website for job aids and additional information on the remaining steps in the process.

Increase Popcorn Sales

New - Please Review

Increase Popcorn Sales

Status : On Track
Start Date : 1/1/2025
Due Date : 12/31/2025
more...

Comments :

B I U S x₂ x² T_x Font Size A- A+

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.

Performance Discussion Step

Guidelines for the Performance Discussion

- Now that the performance evaluation has been submitted, the next step, the Performance Discussion is scheduled.
- Make sure your manager has printed a copy of the review before the discussion so the two of you can address any concerns, add comments, goals or change ratings.
- 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

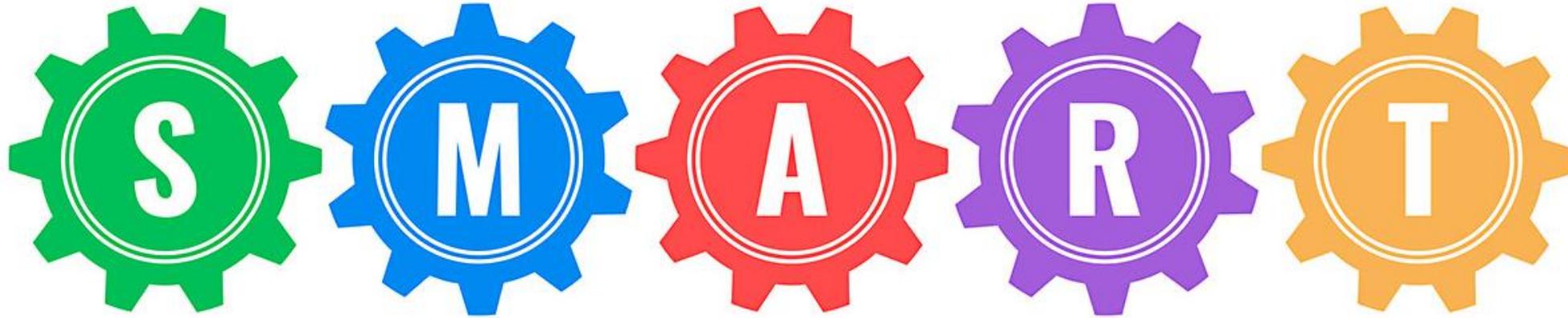
- Use this time to address any concerns you have.
- Speak positively.
- Listen.
- Ask questions about the feedback you are receiving if you need clarification.
- Address any areas you need support in to accomplish your goals.



Things to think about before the discussion

- What could you be doing differently?
- What new skills and knowledge do you need to become more of an asset?
- What goals does your manager have for you?
- How can you be more helpful to your team?
- What challenges does your manager predict over the next year?

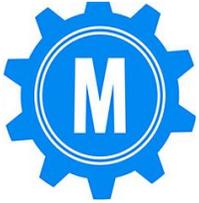
Guide to SMART Goals



- ✓ 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.



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
- Non judgmental
- Continuous and in the moment
- Honest and conversational
- Inquisitive
- Specific
- Descriptive not critical
- Mainly focused on building strengths



Seeking Feedback Guidelines

- Declare your intent
 - Let the other person know why you want feedback. Your intent is typically to learn, develop, and get better as a leader.
- Ask for specific feedback
 - Avoid asking questions that won't generate useful information. Generic question like "How am I doing?" won't give you any specific insight. Instead, try the following:
 - I've been working on _____. How could I get better?
 - What, specifically, do we need to do better with respect to _____(system/structure/process)?

Seeking Feedback Guidelines

- Listen empathically.
 - Listen to understand, not to explain or defend yourself.
- Acknowledge the feedback.
 - “Thanks for the feedback. Let me think about how I can apply it.”
 - “I am grateful for your specific observations. They are very helpful. This is what I plan to do.”
- Evaluate the feedback.
 - Use good judgement to determine what to do with the feedback.
- Commit to action.
 - Make commitments carefully and keep them at all costs. Say what you are going to do and then do it.



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.



Signing and Acknowledgement

- You will get the link to complete you evaluation once your manager has signed and acknowledged it.
- Click on the link and you can click through to the sign and acknowledge page.
- Once you sign and acknowledge the process is complete.

What if I don't agree with my PEP?

- If you refuse to sign your review remember:
 - Signing is not agreement- **it is just acknowledging you were given the opportunity.**
- If you still do not want to sign- discuss this with your HR Consultant.

Trouble Shooting

Common Issues

- My manager did not receive my evaluation and I submitted it-
 - Have your manager verify they are listed as the “Manager” in UNM Jobs.
 - Are you sure you submitted it? Double check that the task is gone from your UNM Jobs tasks and that you clicked “Submit”.
- I accidentally clicked submit and I had more 2022 goals to enter
 - Have your manager or contact PEP to have your evaluation reopened and you can go back in and add more goals.

Contact:

Email: pep@unm.edu

Web: unmjobs.unm.edu