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Navigating the SpartanTalent e-Performance Module

SpartanTalent is UNC Greensboro’s Human Resources Talent Solution Suite for managing recruitment, positions, and performance.

The ePerformance module in SpartanTalent is specifically used to maintain yearly performance plan and appraisal information. It can be used to find both current and past performance actions including performance plans, evaluations, approvals & acknowledgements, progress notes, etc.

Logging in and Accessing the Employee Portal

Log into SpartanTalent e-Performance Management at [https://spartantalent.uncg.edu/hr/sessions/new](https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.

Once logged in, click the ‘ePerformance’ link in the upper left-hand corner of your page.

Note, you can access this link from any module and log in as any user type.

Your Action Items

When you reach the UNC Greensboro Employee Portal, the first screen you will see is ‘Your Action Items’. This will be a list of items that require your attention. Note any ‘Due Date(s)’ indicated.

‘Item’ indicates the review type (Annual, Off-Cycle Review, etc.) ‘Description’ indicates the current process step and/or required action.
If you need to get back to ‘Your Action Items’ page, click the ‘Home’ button at the top of your screen.

Once you have completed the actions in ‘Your Actions Items’ they will no longer appear on this screen unless it is re-opened by a Human Resources administrator.

If you would like to review documents that you have completed and are no longer on ‘Your Action Items’ page, click ‘My Reviews’ to access the ‘Review Dashboard’

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Searching and Dashboard

You can search for reviews by going to the ‘Performance’ menu near the top left of your screen. Click ‘My Reviews’ to see past and current performance review cycles and actions documented in the Spartan Talent ePerformance system.

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When the screen below appears, you will be able to select from a list of past and current performance review cycles. You can also use the filters on the left- hand side to narrow search results.

Select the desired highlighted program you want to review of click the blue ‘View Review’ button to open the overview page.
The ‘Overview’ screen will show you all the performance tasks that will or have occurred in this cycle. It also lists the task owner, the date the task opened, the date the owner completed the task, and the due date of each task. The tasks for which you are the owner are in blue.

On the left side of the screen you can access any completed or open performance actions (‘Plan’, ‘Supervisor Evaluation’), and action ‘History’. There are also ‘Progress Notes’ at the top of your page that will allow you to keep notes throughout the year. Click the link to access the desired document.

You can also find your current job description by clicking the job title, under the name, in the top left corner of the screen. (See arrow)
The Performance Management module is used to; 1) **Create** a SHRA Performance Plan; 2) **Modify** an existing SHRA Performance Plan; and to 3) **Complete** a SHRA Appraisal.

**Employee Acknowledgement of Plan**

To acknowledge a SHRA Performance Plan, log into SpartanTalent ePerformance Management at [https://spartantalent.uncg.edu/hr/sessions/new](https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.

Once logged in, click the ‘Go to ePerformance’ link in the upper left-hand corner of your page

*Note, you can access this link from any module and log in as any user type.*

When you reach the UNC Greensboro Employee Portal, the first screen you will see is ‘Your Action Items’. This will be a list of items that require your attention. Note any ‘Due Date(s)’ indicated.
‘Item’ indicates the review type (Annual, Off-Cycle, etc.). ‘Description’ indicates the current process step and/or required action. To create a new, and/or modify an existing, performance plan, select the description title that reads ‘Employee Acknowledgement of Plan’.

Once selected, the Performance Plan will appear.

Click the ‘Actions’ button to print your Plan if you would like to have a paper copy of the documentation, otherwise it will always be available for viewing under your ‘My Reviews’ folder.

Review the performance expectations contained in your performance plan (Institutional, Individual and Talent Development Plan) and the evaluation methods that your supervisor plans to use to assess your performance throughout the cycle.

When you are done reviewing your performance plan information, type in any comments as necessary in the ‘comments’ box and click the ‘Acknowledge’ button at the bottom of the page. Choosing the
‘acknowledge’ button indicates that you have reviewed your performance plan and understand both your work expectations and the evaluation methods which will be used to assess your performance.

Note: Choosing ‘Acknowledge’ brings the Performance Plan review process to successful completion.

A blue box will appear informing you that your acknowledgement was recorded upon successful completion, the next step in your appraisal process will shift to your supervisor for your mid-year check.

Once you have acknowledged your performance plan, the following screen will appear. On this screen, you may review your Plan, your Approvals and Acknowledgements, and add Progress Notes.

You can get back to the print option by clicking the ‘Plan’ tile. When your plan opens, click the blue ‘Actions’ button in the top right corner of the page to reveal the ‘Print’ option.
To return to the SpartanTalent ePerformance Management site, click the ‘Go to the University of North Carolina at Greensboro HR Suite’ button in the top right-hand corner.

**Employee Acknowledgement of Mid-Year Check-In** To acknowledge a Mid-Year Check-In, log into SpartanTalent ePerformance Management at ([https://spartantalent.uncg.edu/hr/sessions/new](https://spartantalent.uncg.edu/hr/sessions/new)) using your UNCG login credentials.

Once logged in, click the ‘Go to ePerformance’ link in the upper left-hand corner of your page

*Note, you can access this link from any module and log in as any user type.*

Once your Supervisor has ‘Approved’ the Mid-Year Check-In for you, you will see ‘Employee Acknowledgement of Mid-Year Check-In’ in ‘Your Action Items’. This indicates that it is time to
acknowledge that you and your supervisor had a Mid-Year meeting. During this meeting you and your employee will discuss the expectations contained within the Performance Plan, as well as the method(s) of evaluation you intend to use to conduct your assessment of work performance.

Note: You are not to ‘Acknowledge’ this step until ‘After’ the Mid-Year Check-In meeting took place.

Once you open your Mid-Year Check-In, if no revisions have been made, and you have had your meeting with your supervisor, you will have the opportunity to ‘Print’ or ‘Acknowledge’ the Mid-Year Check-In. Note: There is no need to print your Plan as it will always be available for viewing in the ‘My Reviews’ folder. However, if you wish to have a hard copy you can find the option under your blue ‘Actions’ button. After you have acknowledged the Mid-Year Check-In, the next task in the appraisal process will go to your immediate supervisor.
To return to the SpartanTalent ePerformance Management site, click the ‘Go to the University of North Carolina at Greensboro HR Suite’ button in the top right-hand corner.

**Employee Acknowledgement of Appraisal**

To acknowledge your SHRA Annual Performance Appraisal, log into SpartanTalent ePerformance Management ([https://spartantalent.uncg.edu/hr/sessions/new](https://spartantalent.uncg.edu/hr/sessions/new)) using your UNCG login credentials.

Once logged in, click the ‘**Go to ePerformance**’ link in the upper left-hand corner of your page

**Note, you can access this link from any module and logged in as any user type.**

When you reach the UNC Greensboro Employee Portal, the first screen you will see is ‘**Your Action Items**’. This will be a list of items that require your attention. Note any ‘Due Date(s)’ indicated.

‘**Item**’ indicates the review type (Annual, Off-Cycle Review, etc.) ‘**Description**’ indicates the current process step and/or required action. To review your supervisor’s evaluation of your performance, select the description title that reads ‘**Employee Acknowledgement of Appraisal**’. 
When you choose ‘Employee Acknowledgement of Appraisal’ the following screen will appear. You will see your overall rating on the right-hand side of your screen. If you have overall ratings of ‘Exceeding Expectations’ and have a disciplinary action on file, the highest overall rating you can achieve is ‘Meeting Expectations’

In the blue box there is information about the acknowledgement process as well as your grievance rights with regards to your evaluation.

When you have completed a review of your evaluation information, type any comments as necessary in the ‘Comments’ box and click the ‘Acknowledge’ button at the bottom of the page. Choosing the ‘Acknowledge’ button indicates that you have reviewed your evaluation and the documented work assessment has been discussed with you.

Note: Choosing ‘Acknowledge’ brings the Evaluation review process to successful completion.

Once you have acknowledged your evaluation, the screen below will appear. On this screen, you may review your Plan, your Approvals and Acknowledgements, and add Progress Notes.

If you would like to print your appraisal you can click on the ‘Approvals & Acknowledgements’ link on the left of the navigation page. On the next screen, choose ‘Employee Acknowledgement of Appraisal’ and print.
Congratulations!

You have successfully completed all required process steps associated with the ePeformance evaluation process. To return to the SpartanTalent ePerformance Management site, click the ‘Go to the University of North Carolina at Greensboro HR Suite’ button in the top right-hand corner.

Using Progress Notes

At any time after you have acknowledged your performance plan, you may use the Progress Notes functionality to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching. Progress Notes are your personal records to assist with completion of the performance evaluation process. They are confidential and are not viewable by your supervisor unless you choose to share your notes with them. However, all documented items should be professional and performance-related.

To add Progress Notes, log into SpartanTalent ePerformance Management at (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.

Once logged in, click the ‘Go to ePerformance’ link in the upper left-hand corner of your page.

Note, you can access this link from any module and log in as any user type.
Once you are in your employee portal you will see ‘Your Action Items’ please note if you have anything time sensitive in your portal that you have to address. You will see your ‘Progress Notes’ tab at the top of your screen. Click it to bring up your progress notes entry window.

Your Progress Note screen looks like the image below. To create a new Progress Note, choose the blue ‘Create Progress Note’ box to begin.
The progress notes box will ask you what program you wish to create the progress note for such as EHRA or SHRA. Required fields are ‘Employee’, as you can only enter your name just choose yourself. ‘Type’ of progress note, ‘Title’ of your progress note (great job on..., thanks for the help on..., Etc.), and the ‘Comments’ will allow you to enter your feedback.

Clicking on the ‘Share this Progress Note’ will allow you to share your progress note with your supervisor if you choose, if you choose not to share the Progress Note it will remain invisible to the Supervisor and are only for your records.

You may also choose to support your Progress Note with any supporting attachments or documents.
(Note: Progress Notes are not intended to serve as a formal disciplinary action – only documentation of performance-related issues and/or discussions. Formal disciplinary action must be initiated outside of this system and with the involvement of your Human Resources Business Partner).

When you are finished with adding your comments or supporting documentation, click the ‘Create’ button at the bottom of the screen and you will see that your comments have been saved and will either be private to you or shared with your Supervisor.

You may refer to your Progress Notes at any time by choosing the Progress Note drop down box and then highlighting the note you choose to review below.

Once you have chosen the Progress Note, you can ‘Edit’ or ‘Delete’ the note at any time you wish.
To return to the SpartanTalent ePerformance Management site, click the ‘Go to the University of North Carolina at Greensboro HR Suite’ button in the top right-hand corner.

### Off-Cycle Reviews

Off-Cycle reviews are any performance reviews that specifically tell an employee how they would be rated at a specific time in the cycle that is not the annual performance appraisal. Off-Cycle reviews include transfer, employee requested, management driven, and other summary performance appraisals that are used to help keep the employee on track with meeting their goals and clearly state their current rating.

To view your Off-Cycle Review, log into SpartanTalent ePerformance Management at [https://spartantalent.uncg.edu/hr/sessions/new](https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.

Once logged in, click the ‘Go to ePerformance’ link in the upper right-hand corner of your page.

**Note**, you can access this link from any module and log in as any user type.
When you reach the UNC Greensboro Employee Portal, the first screen you will see is ‘Your Action Items’. This will be a list of items that require your attention.

To acknowledge the Off-Cycle Review for the performance cycle, select the description title that reads ‘Employee Acknowledges Off-Cycle Review’ or click the blue ‘View’ button corresponding to the appropriate process step.

Once the Off-Cycle Review is selected, the following screen will appear. Here you will view the following information.

![Image of Employee Portal](image-url)
When you are done reviewing your Off-Cycle Review information, type in any comments as necessary in the ‘comments’ box and click the ‘Acknowledge’ button at the bottom of the page. Choosing the ‘acknowledge’ button indicates that you have reviewed your Off-Cycle comments and understand both your work expectations and the evaluation methods which will be used to assess your performance.

Clicking ‘Acknowledge’ will send this task back to your immediate supervisor for additional entries if they choose to log them throughout the year.

Note: There is one mandatory ‘Off-Cycle’ review due and that is the ‘Mid-Year Check-In’. You may request additional Off-Cycle reviews provided it has been longer than 60 days from your last review.

**Quarterly Probationary Review**

The ‘Probationary Quarterly Review’ is a required Off-Cycle review for new employees (probationary and time limited). The manager/supervisor must conduct quarterly performance reviews during the first 12 months of employment.

If the performance plan has not been established by Oct. 1 for a probationary or time limited employee, during the employee’s first performance appraisal cycle, then the employee shall have an extended performance cycle and shall receive a first annual performance appraisal at the end of the next cycle.

To view your Probationary Quarterly Review, log into SpartanTalent ePerformance Management at [https://spartantalent.uncg.edu/hr/sessions/new](https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.

Once logged in, click the ‘Go to ePerformance’ link in the upper left-hand corner of your page

**Note**, you can access this link from any module and log in as any user type.
When you reach the UNC Greensboro Employee Portal, the first screen you will see is ‘Your Action Items’. This will be a list of items that require your attention.

To view your Probationary Quarterly Review for the performance cycle, select the description title that reads ‘Probationary Quarterly Review’.

Once you have selected ‘Probationary Quarterly Review’ you can read the Quarterly Review notes given by your Supervisor. You will have the option at the bottom of the review to enter comments if you choose to do so or you can simply ‘Acknowledge’ the review.

Note: By clicking ‘Acknowledge’ will close out the process for this review. Once closed it can only be re-opened by an HR Administrator.

Probationary Employees: To align with State policy, SHRA probationary employees must receive quarterly performance reviews (4 in total with the first one to align within the first 90 days of employment) in addition to the standard annual performance appraisal for the cycle ending March 31. These reviews do not require individual or overall ratings, just brief written comments.

It is not recommended that you ‘Acknowledge’ the Probationary quarterly review if you have not had communication with your supervisor prior to submission.
To return to the SpartanTalent ePerformance Management site, click the ‘Go to the University of North Carolina at Greensboro HR Suite’ button in the top right-hand corner.

This concludes the training for SHRA Employees for ePerformance. If you have any questions not covered in this training, please contact the Human Resource office at 336-334-5009 or you may submit a query by following: https://uncg.qualtrics.com/jfe/form/SV_7Wlup1FY03m69w1