Stay on target with

ePerformance

UNC
GREENSBORO
Human Resources

UNCG

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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 ePerformance Management at (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.
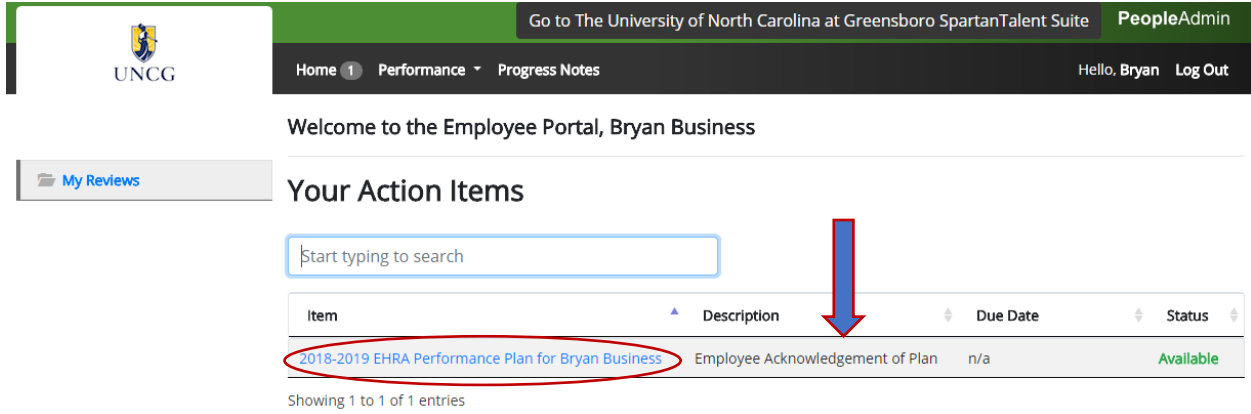
Once logged in, click the ' ePerformance' link in the upper left-hand corner of your page.

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'


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.
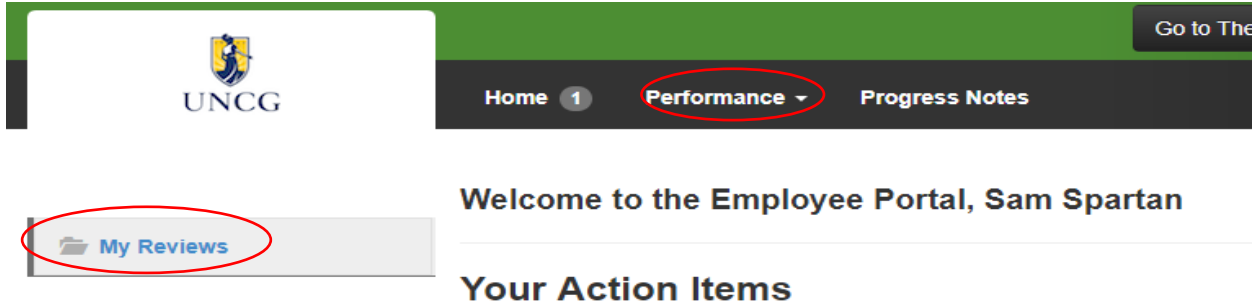
When the screen below appears, you will be able to select from a list of past and current performance review cycles. You can also use the filters on the left- hand side to narrow search results.
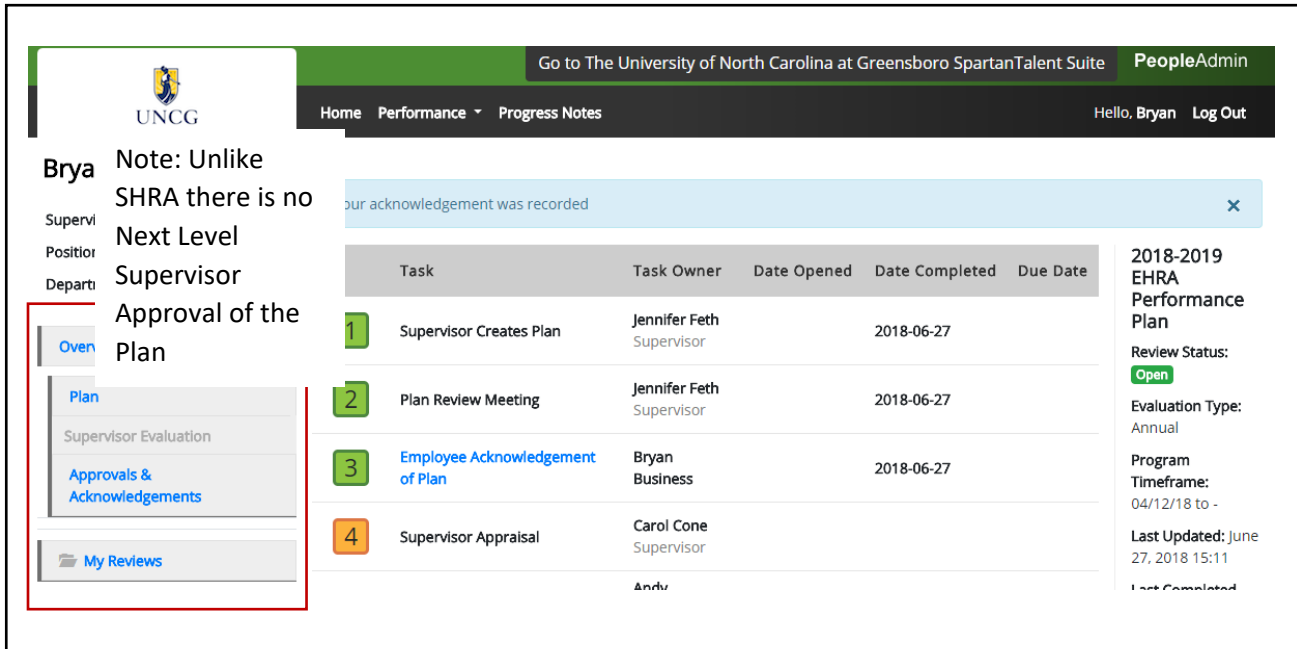
Select the desired highlighted program you want to review of click the blue **'View Review'** button to open the overview page.
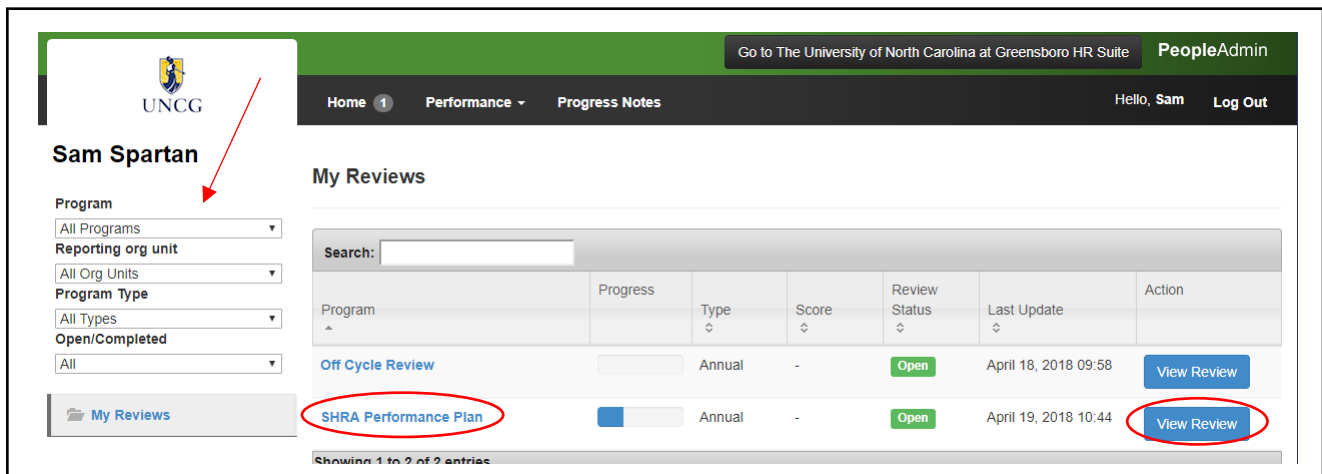
The **'Overview'** screen will show you all the performance tasks that will or have occurred in this cycle. It also lists the task owner, the date the task opened, the date the owner completed the task, and the due date of each task. The tasks for which you are the owner are in blue.

On the left side of the screen you can access any completed of 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)

Note: Unlike SHRA there is no Next Level Supervisor Approval of the Plan

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	Supervisor Creates Plan	Jennifer Feth Supervisor		2018-06-27	
2	Plan Review Meeting	Jennifer Feth Supervisor		2018-06-27	
3	Employee Acknowledgement of Plan	Bryan Business		2018-06-27	
4	Supervisor Appraisal	Carol Cone Supervisor			

2018-2019 EHRA Performance Plan

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: June 27, 2018 15:11

Performance Plan Process Steps
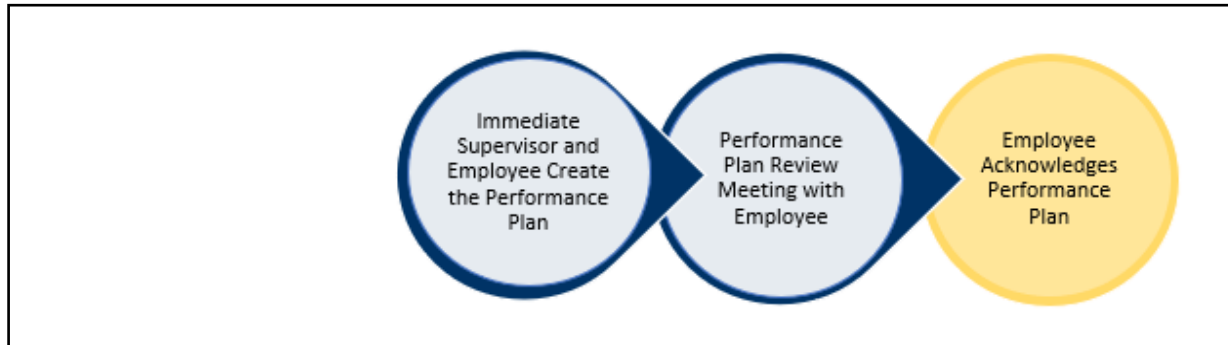
The Performance Management module is used to; 1) **Create** an EHRA Performance Plan; 2) **Modify** an existing EHRA Performance Plan; and to 3) **Complete** an EHRA Appraisal.

Employee Acknowledgement of Plan

To acknowledge an EHRA Performance Plan, log into SpartanTalent ePerformance Management at (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.
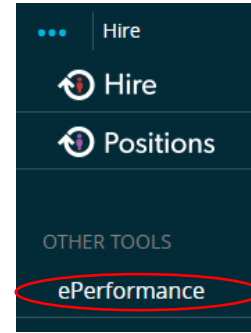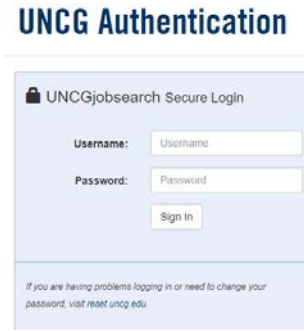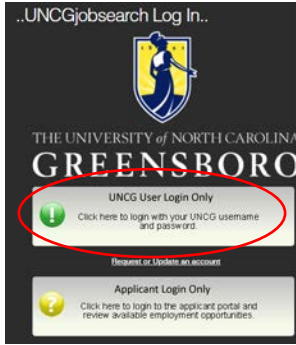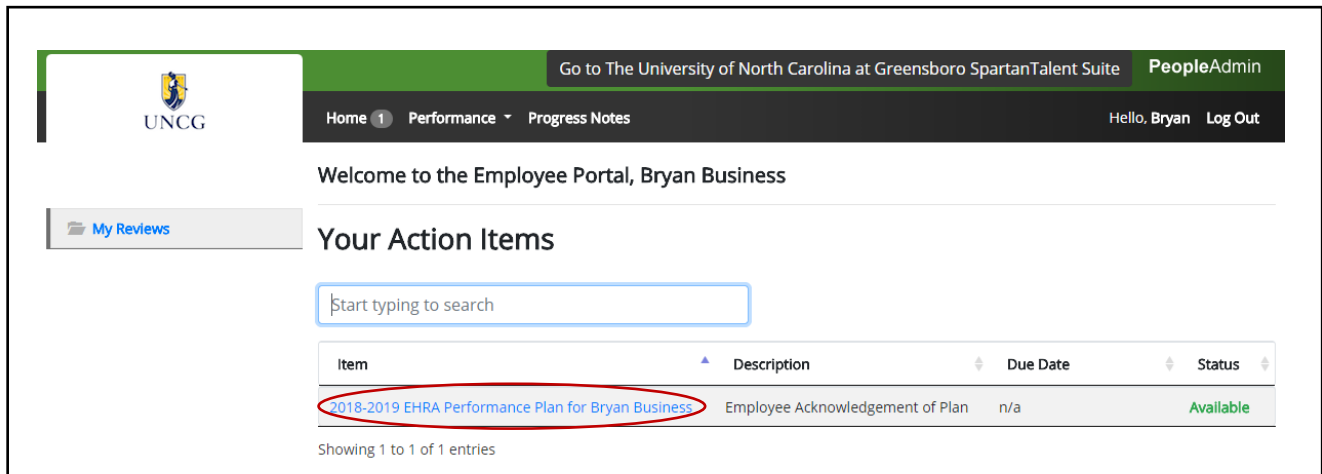
Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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

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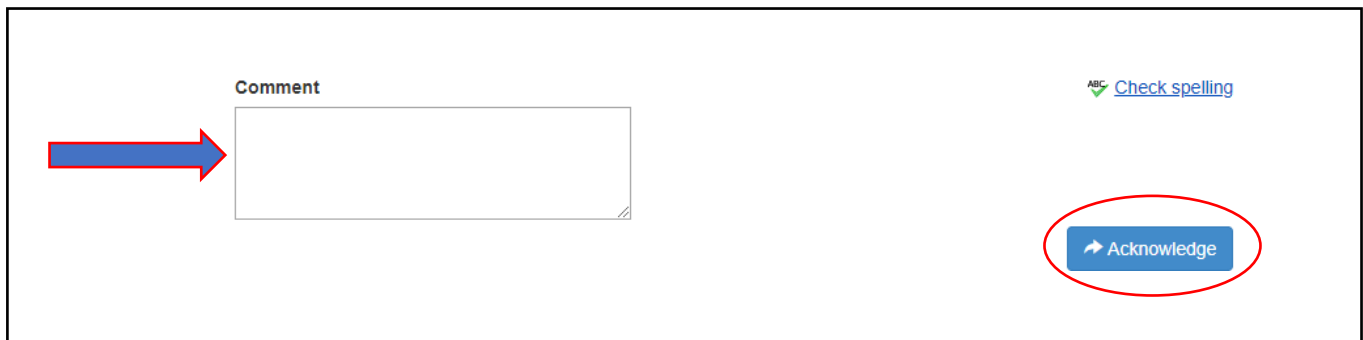
Click the **'Actions'** button to print your Plan if you would like to have a paper copy of the documentation, otherwise it will always be available for viewing under your **'My Reviews'** folder.

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.
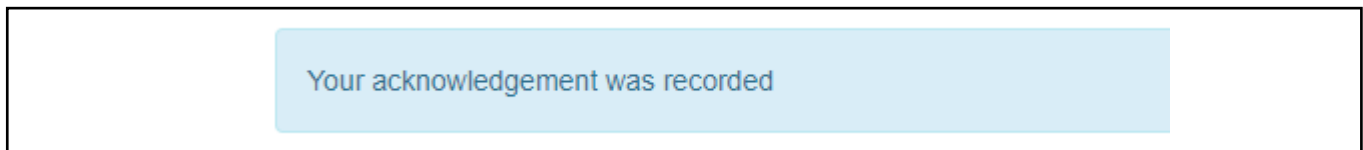

When you are done reviewing your performance plan information, type in any comments as necessary in the 'comments' box and click the **'Acknowledge'** button at the bottom of the page. Choosing the 'acknowledge' button indicates that you have reviewed your performance plan and understand both your work expectations and the evaluation methods which will be used to assess your performance.
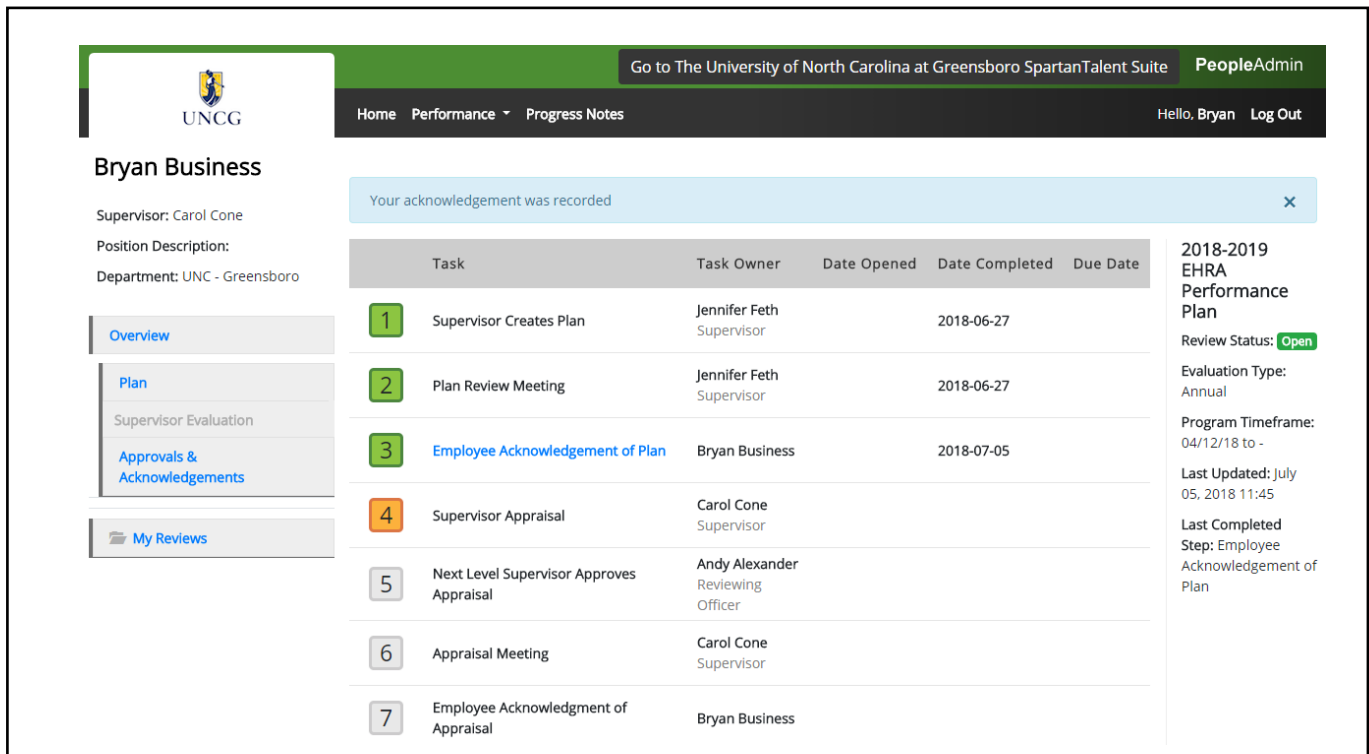
Note: Choosing **'Acknowledge'** brings the Performance Plan review process to successful completion.

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.

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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

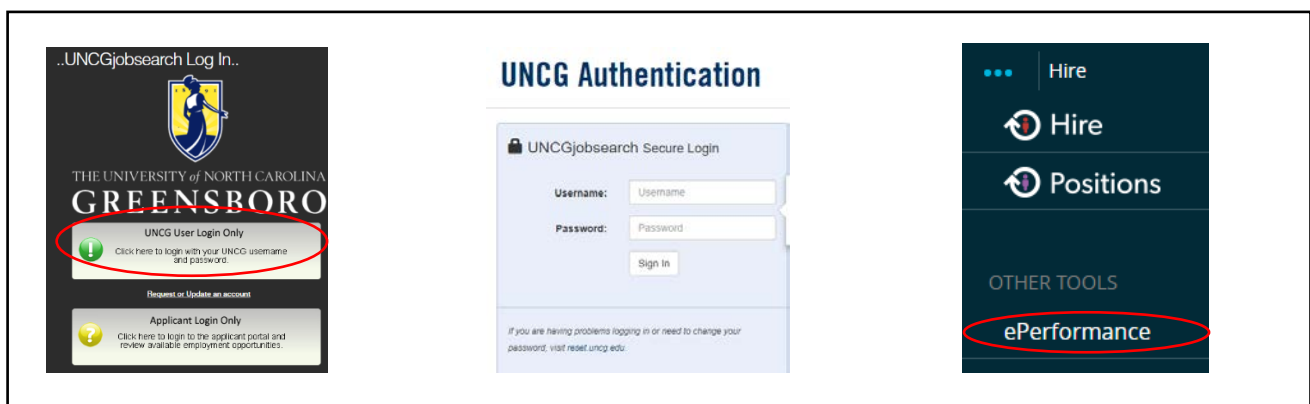To acknowledge your EHRA Annual Performance Appraisal, log into SpartanTalent ePerformance Management (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.
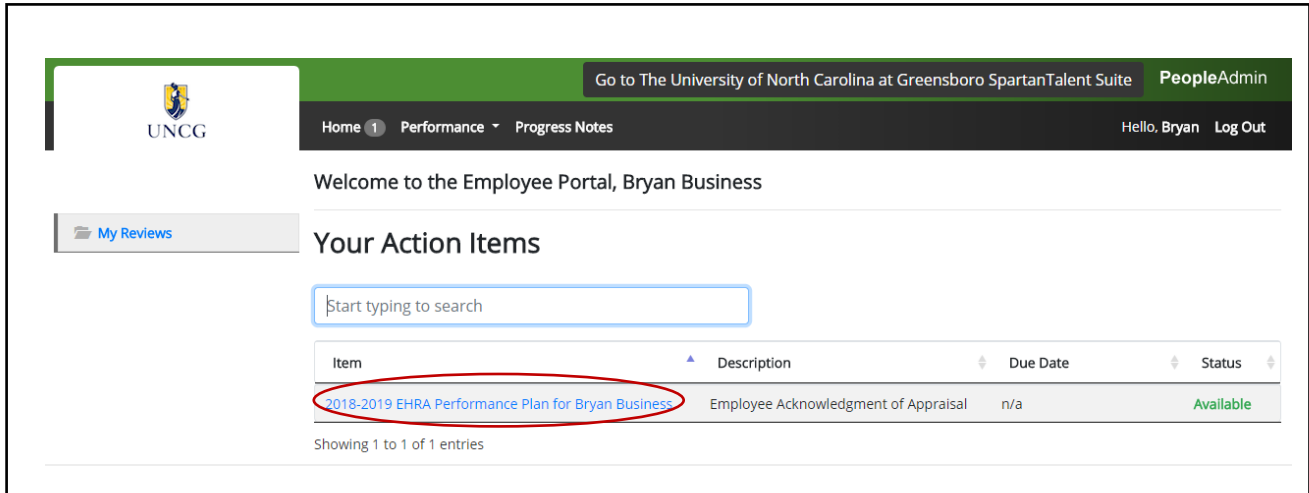

Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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'.**
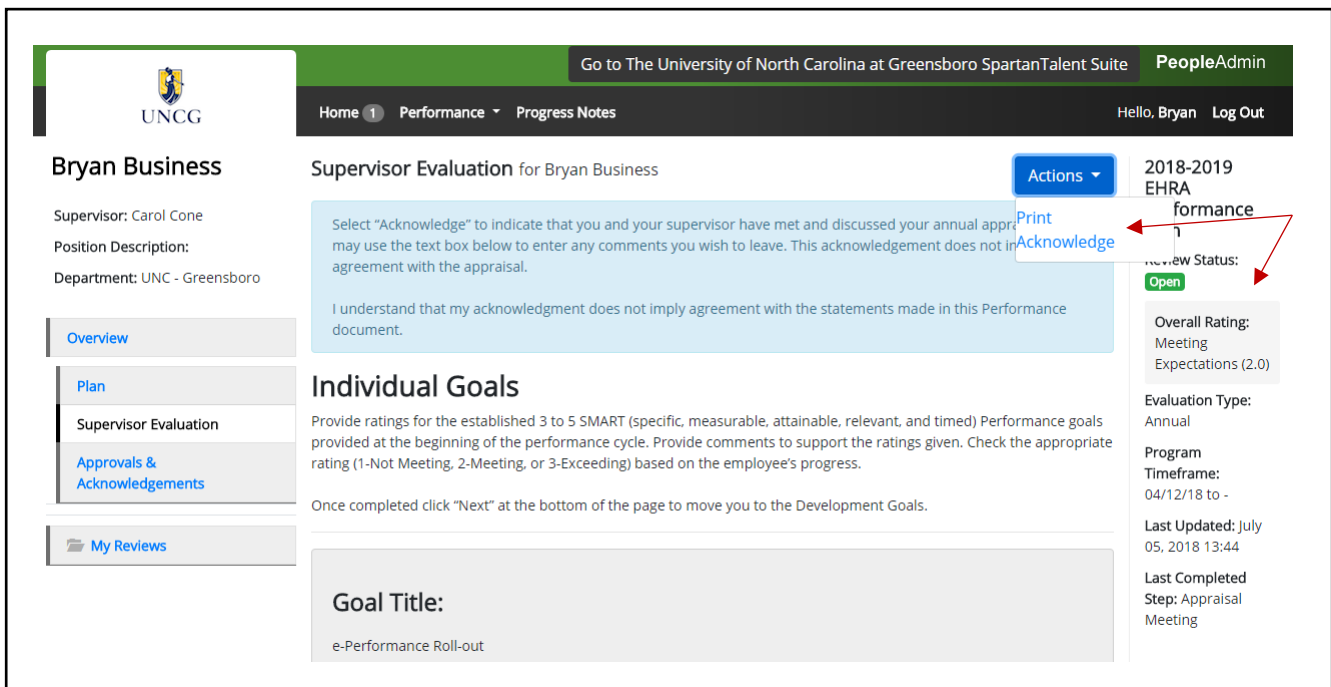
When you choose **'Employee Acknowledgement of Appraisal'** the following screen will appear. You will see your overall rating on the right- hand side of your screen. If you have overall ratings of 'Exceeding Expectations' and have a disciplinary action on file, the highest overall rating you can achieve is 'Meeting Expectations'

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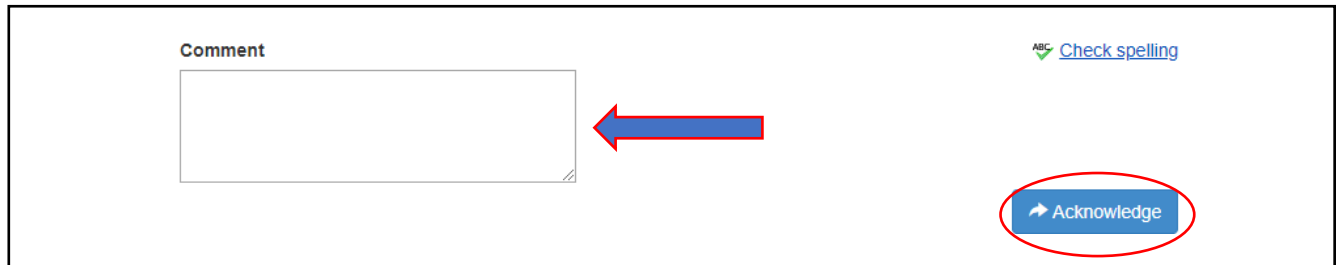
Once you have acknowledged your evaluation, the screen below will appear. On this screen, you may review your Plan, your Approvals and Acknowledgements, and add Progress Notes.

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!

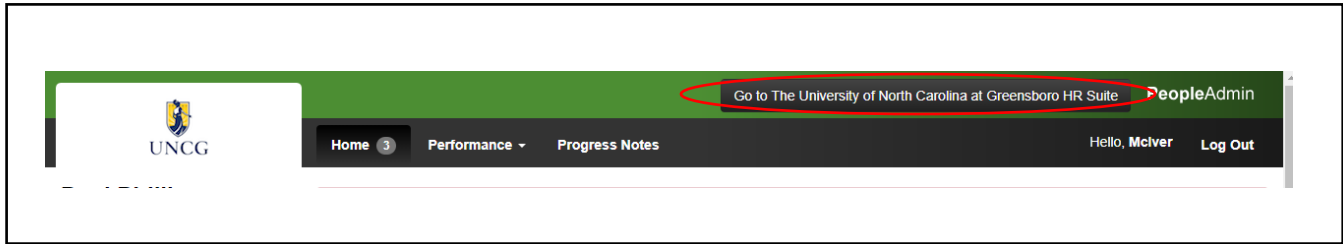You have successfully completed all required process steps associated with the ePeformance evaluation process. To return to the SpartanTalent ePerformance Management site, click **the 'Go to the University of North Carolina at Greensboro HR Suite'** button in the top right- hand corner.

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.
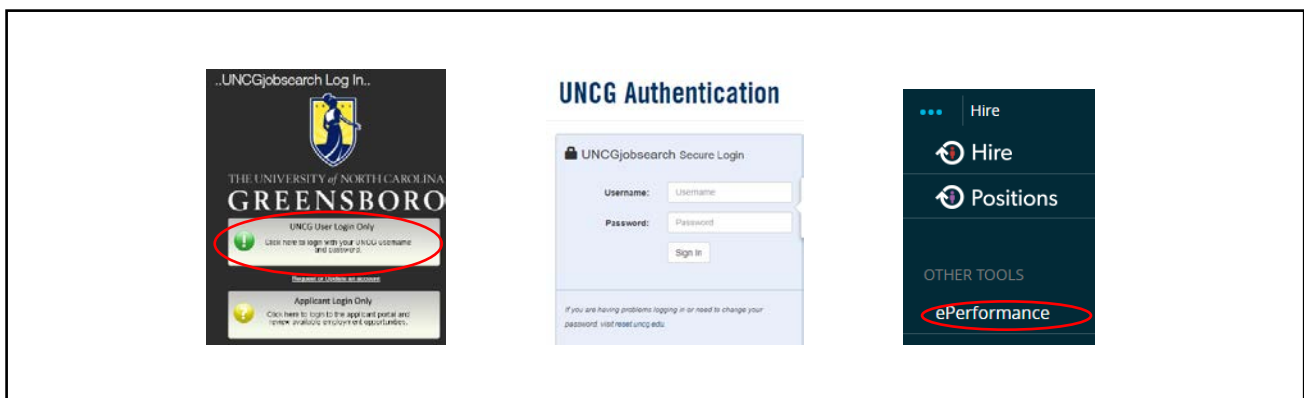
Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page. **Note, you can access this link from any module and log in as any user type.**

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.
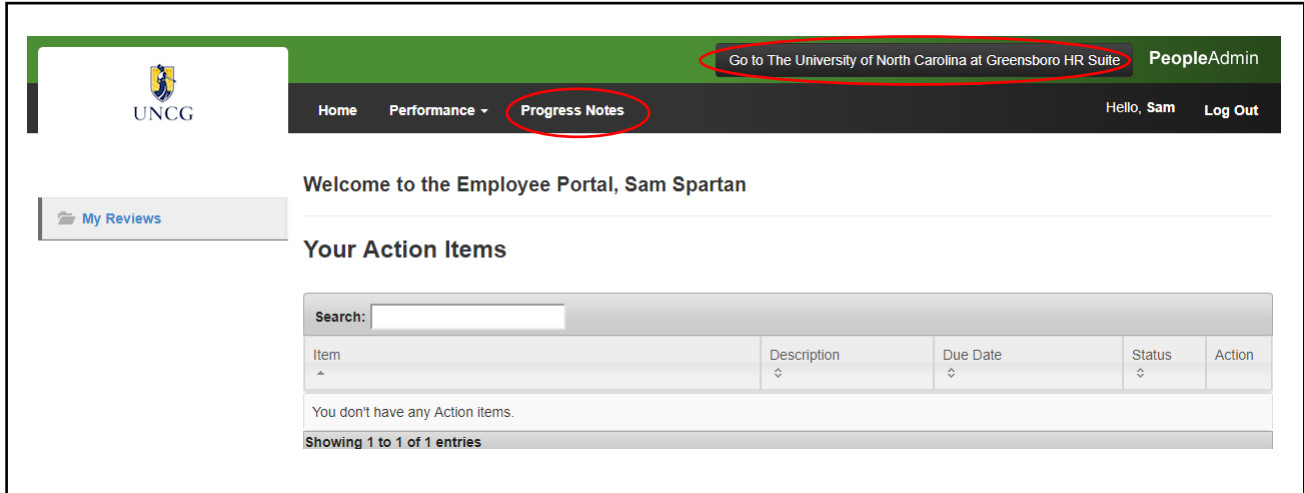
Your Progress Note screen looks like the image below. To create a new Progress Note, choose the blue **'Create Progress Note'** box to begin.

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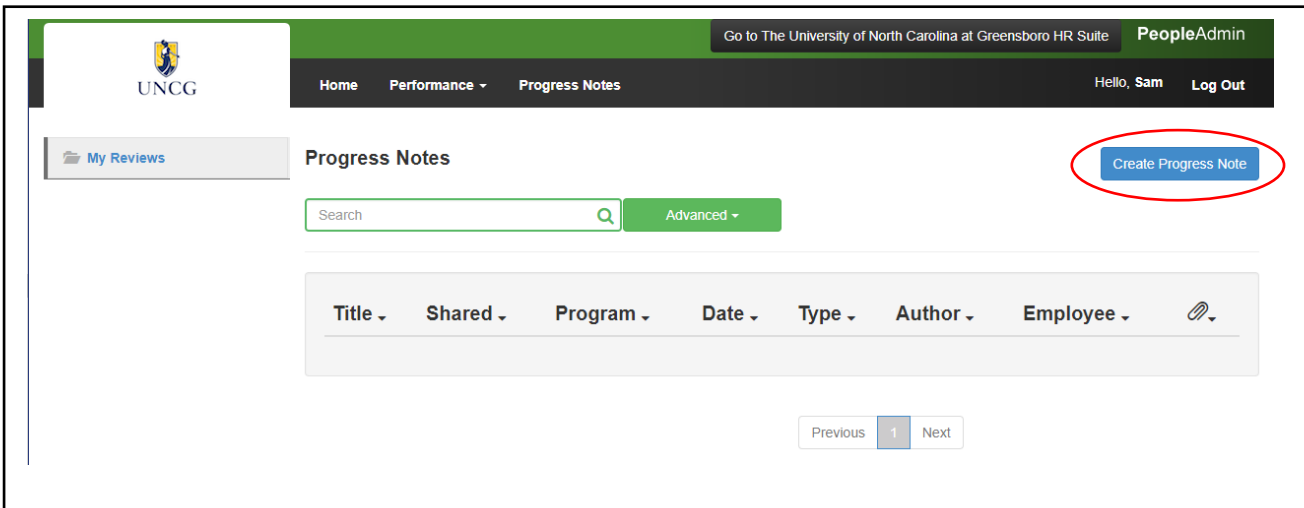
New Progress Note ✕

Program *(optional)*

[-- choose an option -- ▼]

Employee *

[Sam Spartan ▼]

Type *

[Original Progress Note ▼]

Title *

[Mentoring]

Comments *

[For the month of April I successfully mentored and trained the new employees that started in the file room and they are able to now work independently.]

↱ | **Share this Progress Note** ⬅

[**Attachment ▾**]

[**Create**] [Cancel]
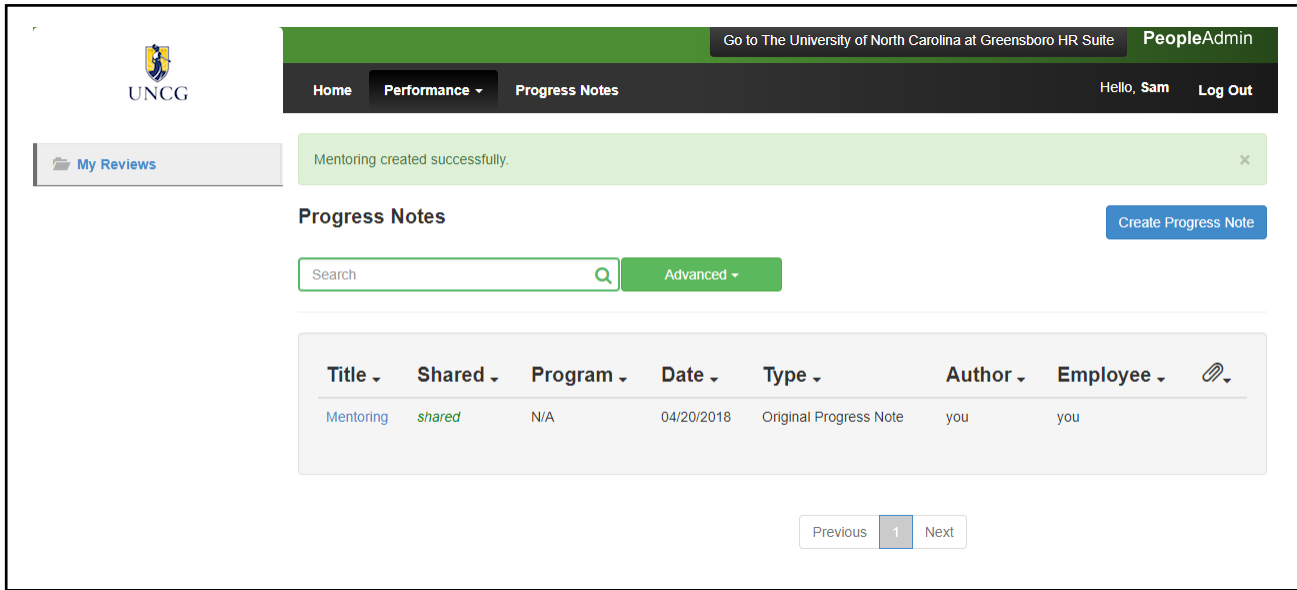
The progress notes box will ask you what program you wish to create the progress note for such as EHRA or SHRA. Required fields are '**Employee**', as you can only enter your name just choose yourself. '**Type**' of progress note, '**Title**' of your progress note (great job on…, thanks for the help 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.

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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.

Mentoring ✕

Program
N/A

Type
Original Progress Note

Shared
Shared with Mary Minerva

Comments
For the month of April I successfully mentored and trained the new employees that started in the file room and they are able to now work independently.

Delete   Edit   Cancel

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.

Go to The University of North Carolina at Greensboro HR Suite   PeopleAdmin

UNCG   Home 3   Performance ▾   Progress Notes   Hello, McIver   Log Out
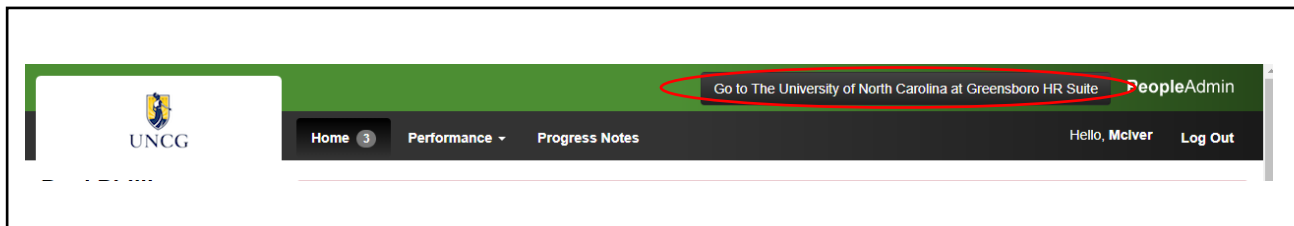
This concludes the training for EHRA Employees for ePerformance. If you have any questions not covered in this training, please contact the Human Resource office at 336-334-5009 or you may submit a query by following: https://uncg.qualtrics.com/jfe/form/SV_7WIuplFY03m69w1

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