

Stay on target with

ePerformance



UNC  
GREENSBORO  
Human Resources

UNCG



SPARTANTALENT  
ePerformance

EHRA SUPERVISOR USER  
GUIDE



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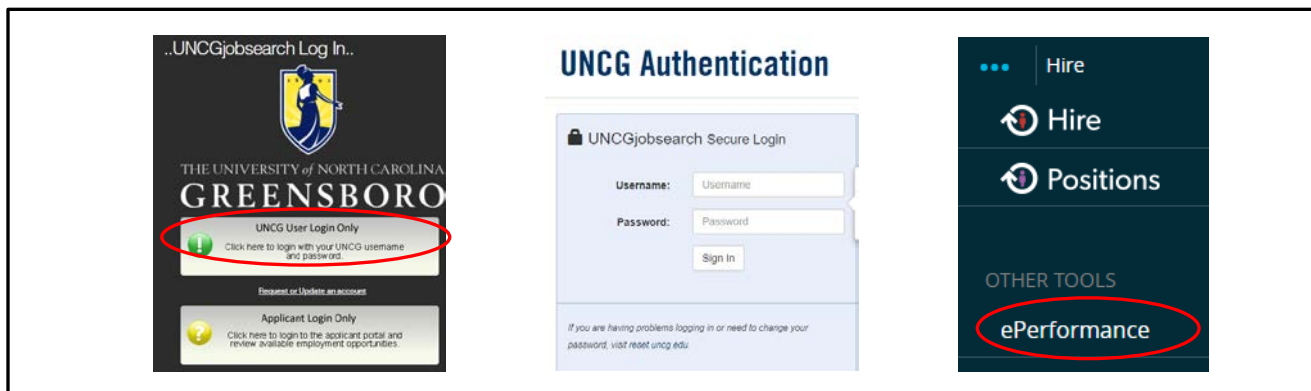
## Navigating the SpartanTalent ePerformance Module

SpartanTalent is UNC Greensboro’s Human Resources Talent Solution Suite for managing recruitment, positions, and performance. The type of SpartanTalent access you have is determined by your position and may be requested through your supervisor or the Business Officer in your college/division. For information on getting started in SpartanTalent please review the user guides on the UNCG Performance Management homepage.

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 ( <https://spartantalent.uncg.edu/hr/sessions/new> ) using your UNCG login credentials.



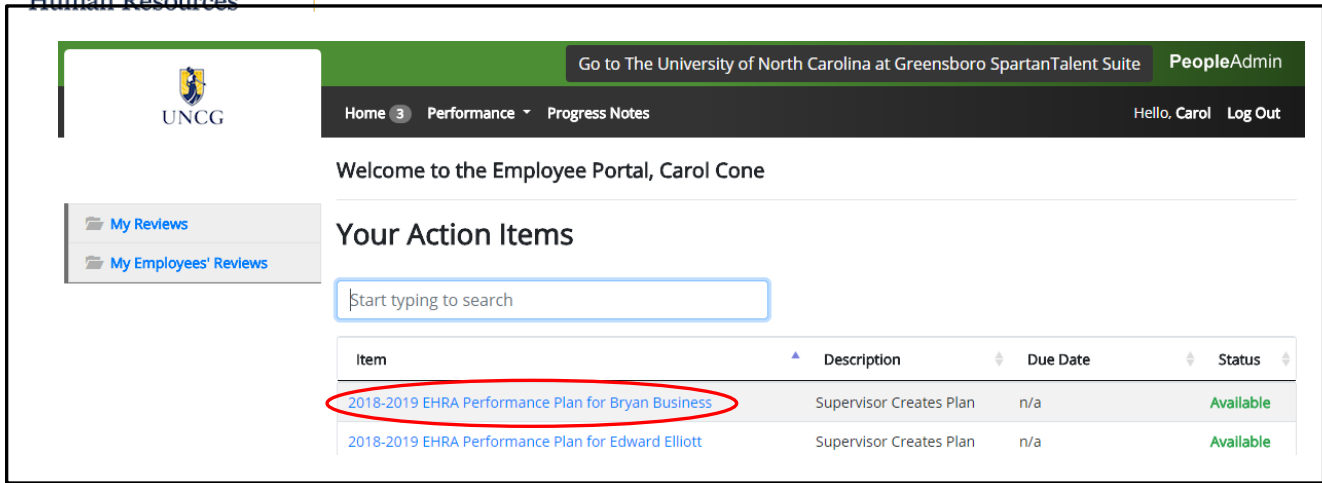
Once logged in, click the ‘Go to ePerformance’ link in the upper left-hand corner of your page.

**Note: You can access this link from any nodule 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. Select the description link corresponding to the appropriate process step to access the action that needs to be completed.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home **3** Performance Performance Notes Hello, Carol Log Out

Welcome to the Employee Portal, Carol Cone

**Your Action Items**

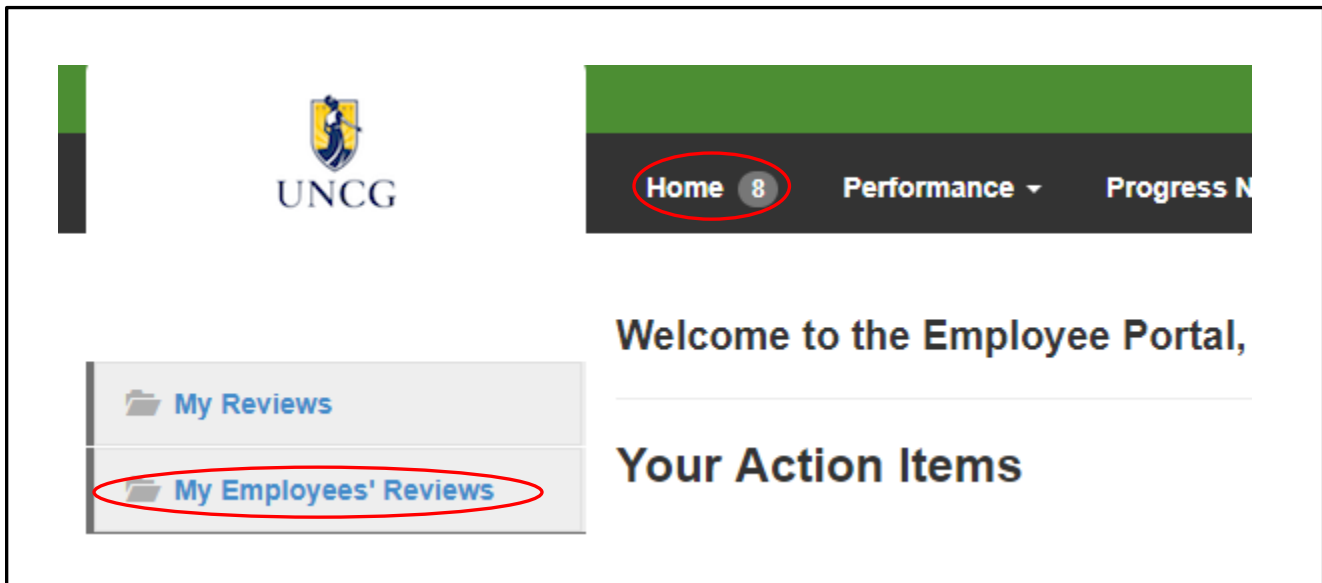
Start typing to search

Item	Description	Due Date	Status
2018-2019 EHRA Performance Plan for Bryan Business	Supervisor Creates Plan	n/a	Available
2018-2019 EHRA Performance Plan for Edward Elliott	Supervisor Creates Plan	n/a	Available

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 reopened by a Human Resources administrator or is sent back to you by the Next Level Supervisor or approver of the action.

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



UNCG

Home **8** Performance Performance Notes

Welcome to the Employee Portal,

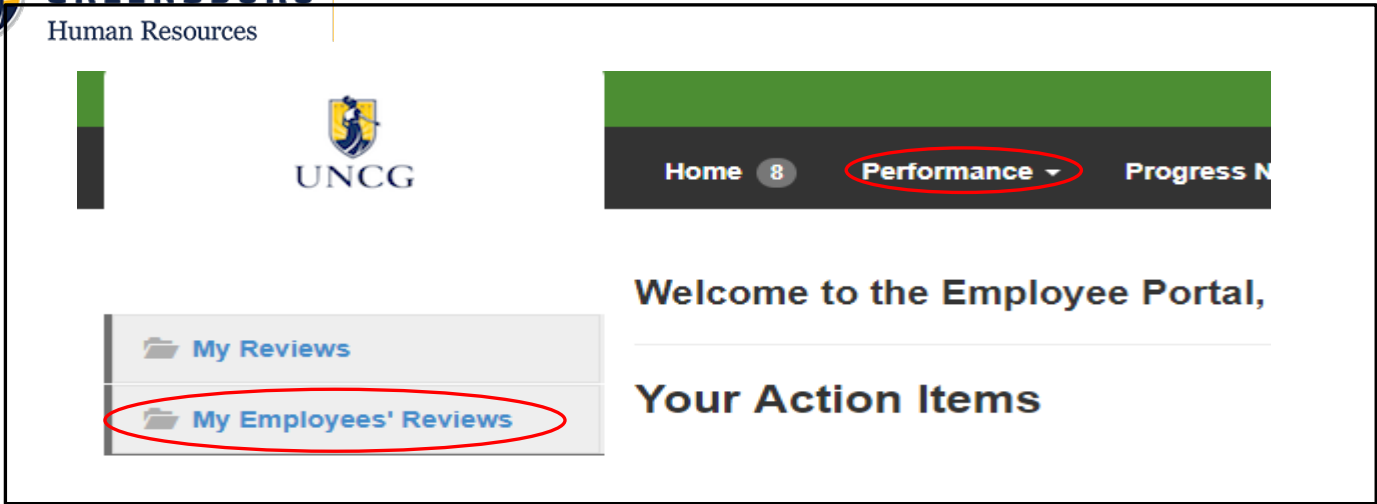
**Your Action Items**

My Reviews

My Employees' Reviews

## Searching and Dashboard

You can search for employee reviews by going to the **'Performance'** menu near the top left of your screen. Click **'My Employees' Reviews'** to take you to your 'Reviews Dashboard'. Here you can see past and current performance review cycles and actions documented in the SpartanTalent ePerformance system.



When the screen below appears, it will automatically show you the current active performance cycle programs which are open. (If you notice any discrepancies, call Ext. 4-4508 or submit a issue ticket to HR via [https://uncg.qualtrics.com/jfe/form/SV\\_7WluplFY03m69w1](https://uncg.qualtrics.com/jfe/form/SV_7WluplFY03m69w1)) You can monitor your performance processes easily by using the colored status tabs at the top of the dashboard. You can also get a quick look at a specific process' name and owner by hovering over the colored step blocks.

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

Home 2 Performance Progress Notes Hello, Carol Log Out

**Reviews Dashboard**

Reset Program None Employee Name Group by: Program Advanced

**Status Tab** → All Reviews 1 Not Started 0 In Process 1 Complete 0 Overdue 0 Disputed 0

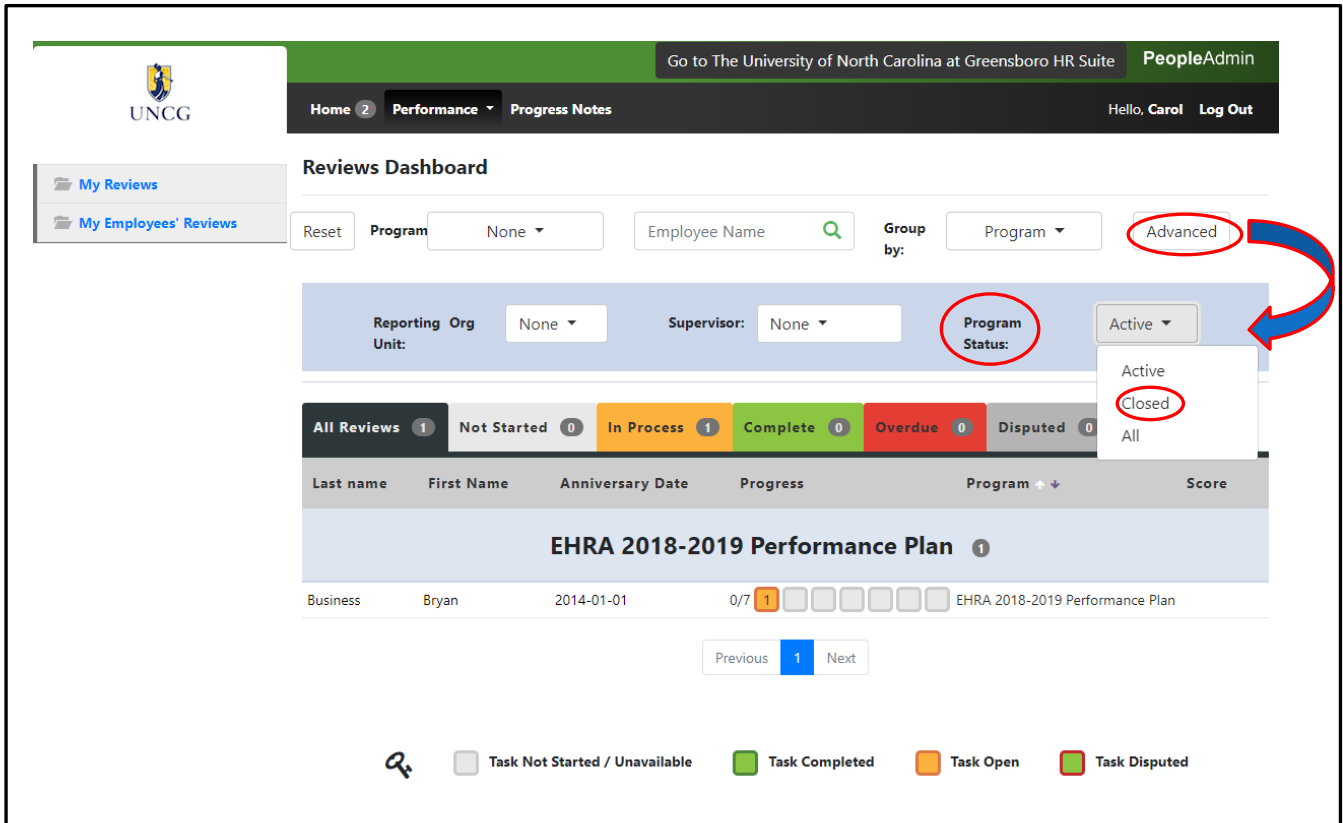
**Current Program** → **EHRA 2018-2019 Performance Plan** 1

Last name	First Name	Anniversary Date	Progress	Program	Score
Business	Bryan	2014-01-01	0/7 1	EHRA 2018-2019 Performance Plan	

Previous 1 Next

**Process Key** → Task Not Started / Unavailable Task Completed Task Open Task Disputed


The filter bar at the top of the navigation screen allows you to sort by a specific program, search for a specific employee, and /or group the information by supervisor, reporting unit, etc. The **'Advanced'** filter button gives you more sort options including **'Program Status'**. By setting the 'Program Status' to **'Closed'**, you will be able to access past performance programs which will contain records such as performance plan and evaluations.



The screenshot shows the 'Reviews Dashboard' in the PeopleAdmin system. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes'. Below this, there are filter options for 'Program' (set to 'None'), 'Employee Name' (with a search icon), and 'Group by' (set to 'Program'). The 'Advanced' filter button is circled in red. Below these filters, there are options for 'Reporting Org Unit' (set to 'None') and 'Supervisor' (set to 'None'). The 'Program Status' dropdown menu is open, showing options for 'Active', 'Closed', and 'All'. The 'Closed' option is circled in red. Below the filters, there is a summary bar with 'All Reviews' (1), 'Not Started' (0), 'In Process' (1), 'Complete' (0), 'Overdue' (0), and 'Disputed' (0). Below this is a table with columns for 'Last name', 'First Name', 'Anniversary Date', 'Progress', 'Program', and 'Score'. The first row shows 'Business', 'Bryan', '2014-01-01', '0/7', and 'EHRA 2018-2019 Performance Plan'. At the bottom, there is a legend for task status: 'Task Not Started / Unavailable' (grey), 'Task Completed' (green), 'Task Open' (orange), and 'Task Disputed' (red).


Select the desired employee for a particular program to access the 'Overview' screen. This screen is where you will access the performance records and history.

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**. Use the following key to identify the tasks status.


 Task Not Started / Unavailable
 Task Completed
 Task Open
 Task Disputed

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 employee's current job description by clicking the job title, under the employee's name, in the top left corner of the screen. (See arrow)



[Go to The University of North Carolina at Greensboro HR Suite](#)
PeopleAdmin

Home <sup>2</sup>
Performance ▾
Progress Notes
Hello, Carol [Log Out](#)

### Bryan Business

Supervisor: Carol Cone

Position Description: [←](#)

Department: UNC - Greensboro

- [Overview](#)
- [Plan](#)
- Supervisor Evaluation
- [History](#)
- [My Reviews](#)
- [My Employees' Reviews](#)

	Task	Task Owner	Date Opened	Date Completed	Due Date
1	<a href="#">Supervisor Creates Plan</a>	Carol Cone Supervisor			
2	Plan Review Meeting	Carol Cone Supervisor			
3	Employee Acknowledgement of Plan	Bryan Business			
4	Supervisor Appraisal	Carol Cone Supervisor			
5	Next Level Supervisor Approves Appraisal	Andy Alexander Reviewing Officer			
6	Appraisal Meeting	Carol Cone Supervisor			
7	Employee Acknowledgment of Appraisal	Bryan Business			

#### EHRA 2018-2019 Performance Plan

Review Status: Open

Evaluation Type: Annual

Program

Timeframe: 04/12/18 to -

Last Updated: April 26, 2018 09:23

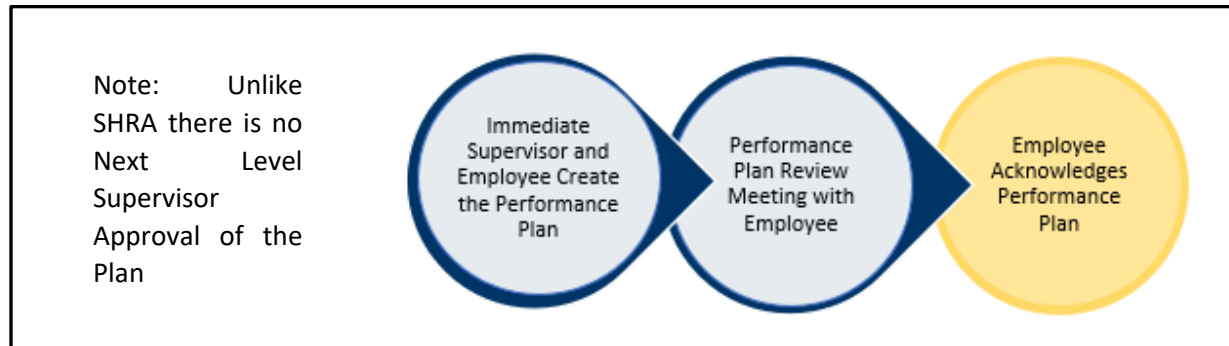
Co-reviewer: [Add Co-reviewer](#)



## Performance Management

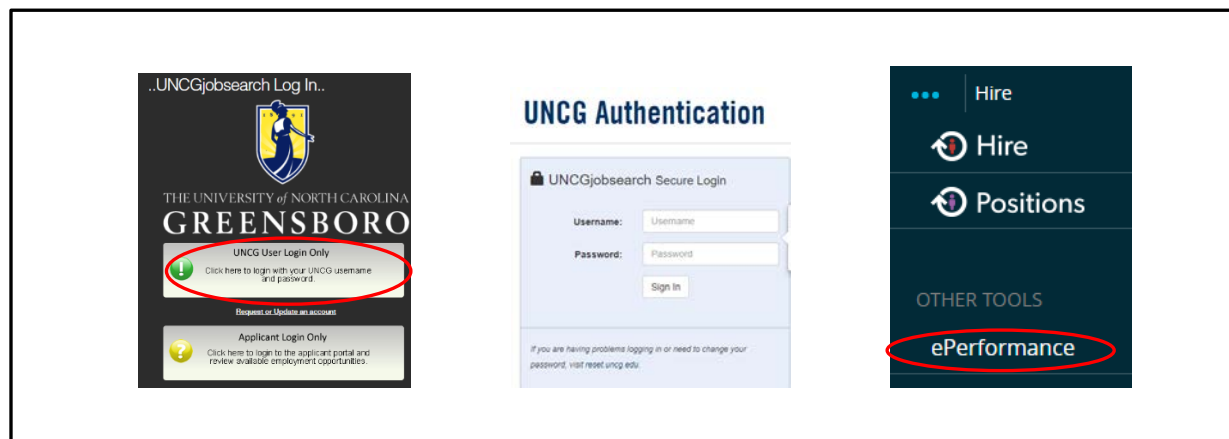
The Performance Management module is used to; 1) **Create** an EHRA Performance Plan; 2) **Modify** an existing EHRA Performance Plan; and to 3) **Complete** an EHRA Appraisal.

### Performance Plan Process Steps



### Create EHRA Performance Plan

To create a EHRA Performance Plan, log into SpartanTalent ePerformance Management (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.

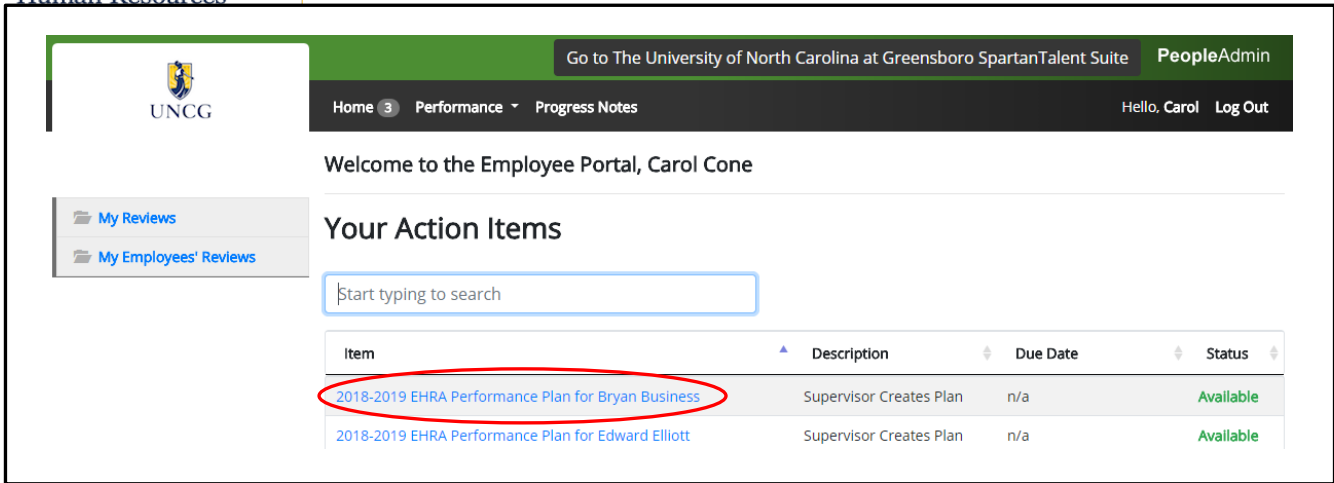


Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

**Note, you can access this link from any module and 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 **'Supervisor Creates Plan'**.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home **3** Performance ▾ Progress Notes Hello, Carol Log Out

Welcome to the Employee Portal, Carol Cone

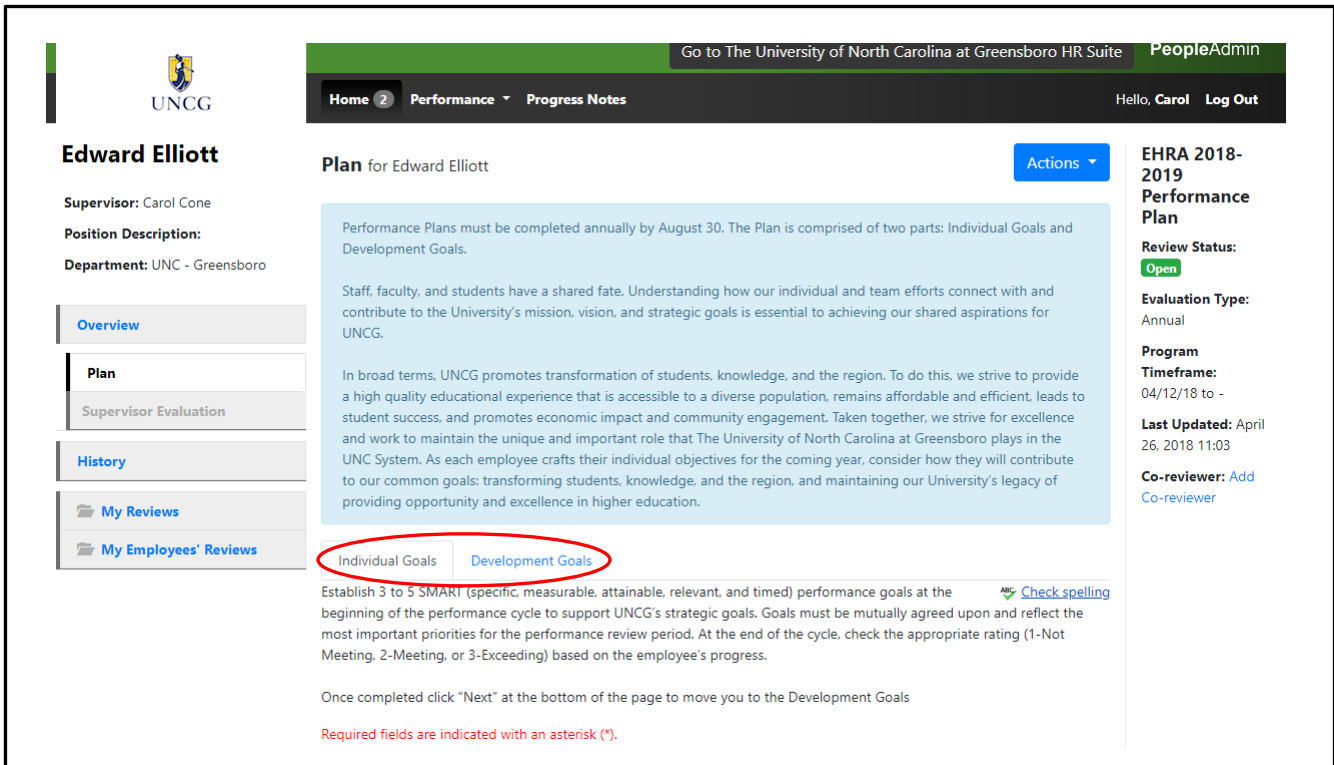
**Your Action Items**

Start typing to search

Item	Description	Due Date	Status
<b>2018-2019 EHRA Performance Plan for Bryan Business</b>	Supervisor Creates Plan	n/a	Available
2018-2019 EHRA Performance Plan for Edward Elliott	Supervisor Creates Plan	n/a	Available

**Note!** Prior to the beginning of the new performance cycle, and you drafting the new performance plan, you should sit down with your employee to discuss the department or unit’s strategic goals for the cycle. You and your employee may be able to collaborate on what individual goals and career development goals should be included in the plan.

Once selected, the Performance Plan will appear. There are **two (2) tab sections** across the top of the plan.



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

Home **2** Performance ▾ Progress Notes Hello, Carol Log Out

**Edward Elliott**

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

**Plan** for Edward Elliott **Actions** ▾

EHRA 2018-2019 Performance Plan  
Review Status: **Open**  
Evaluation Type: Annual  
Program Timeframe: 04/12/18 to -  
Last Updated: April 26, 2018 11:03  
Co-reviewer: Add Co-reviewer

Performance Plans must be completed annually by August 30. The Plan is comprised of two parts: Individual Goals and Development Goals.

Staff, faculty, and students have a shared fate. Understanding how our individual and team efforts connect with and contribute to the University’s mission, vision, and strategic goals is essential to achieving our shared aspirations for UNCG.

In broad terms, UNCG promotes transformation of students, knowledge, and the region. To do this, we strive to provide a high quality educational experience that is accessible to a diverse population, remains affordable and efficient, leads to student success, and promotes economic impact and community engagement. Taken together, we strive for excellence and work to maintain the unique and important role that The University of North Carolina at Greensboro plays in the UNC System. As each employee crafts their individual objectives for the coming year, consider how they will contribute to our common goals: transforming students, knowledge, and the region, and maintaining our University’s legacy of providing opportunity and excellence in higher education.

Individual Goals | **Development Goals**

Establish 3 to 5 SMART (specific, measurable, attainable, relevant, and timed) performance goals at the beginning of the performance cycle to support UNCG’s strategic goals. Goals must be mutually agreed upon and reflect the most important priorities for the performance review period. At the end of the cycle, check the appropriate rating (1-Not Meeting, 2-Meeting, or 3-Exceeding) based on the employee’s progress.

Once completed click “Next” at the bottom of the page to move you to the Development Goals

Required fields are indicated with an asterisk (\*).

The **first tab** section is titled **'Individual Goals'**. This is where you will establish 3-5 SMART performance goals at the beginning of the performance cycle to support UNCG's strategic goals. Goals must be mutually agreed upon and reflect the most important priorities for the performance review period.

### Individual Goals

\* **Goal Title**

\* **Description**

Coordinate with all department supervisors to ensure that the new rollout of ePerformance is taught and implemented correctly across campus. Training labs will be scheduled and participant and facilitator guides will be drafted to be given out with the lab training. All training is to be completed no later than July 1, 2018

**Remove Entry?**

**Add Entry**

**Save Draft** **Next >**

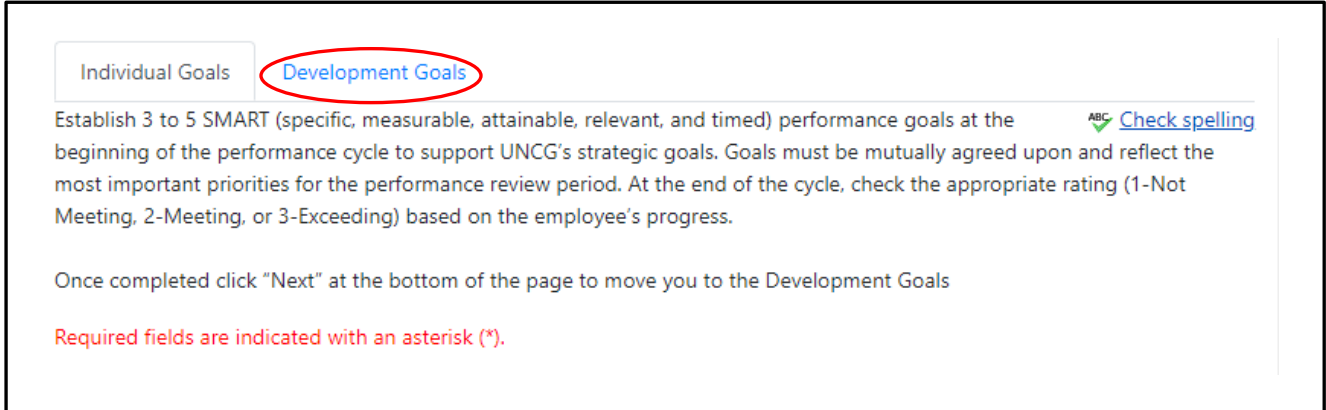
You may add new individual goals as necessary and/or appropriate. Please label each goal that is added. The **'Add Entry'** button should be selected to open a new entry field.

Note: Individual goals should be specific to the job description or department mission and not around personal development. If a goal were to be something like "finish degree" that would be more of a development goal and carries no weight in the Annual Appraisal. Examples of Individual goals may be but not limited to: Complete banner training, create a social media campaign around department visibility, complete safety training to learn the proper handling of hazardous materials.

When you reach the bottom of the page and have completed/edited each individual goal, you may click **'Save Draft'** or **'Next'**. Choosing the **'Save Draft'** button will allow you to come back and complete the performance plan at a later point in time. Choosing the **'Next'** button will move you forward to the next tab section. (**Note:** The **'Next'** button will enable auto save for the work just completed).

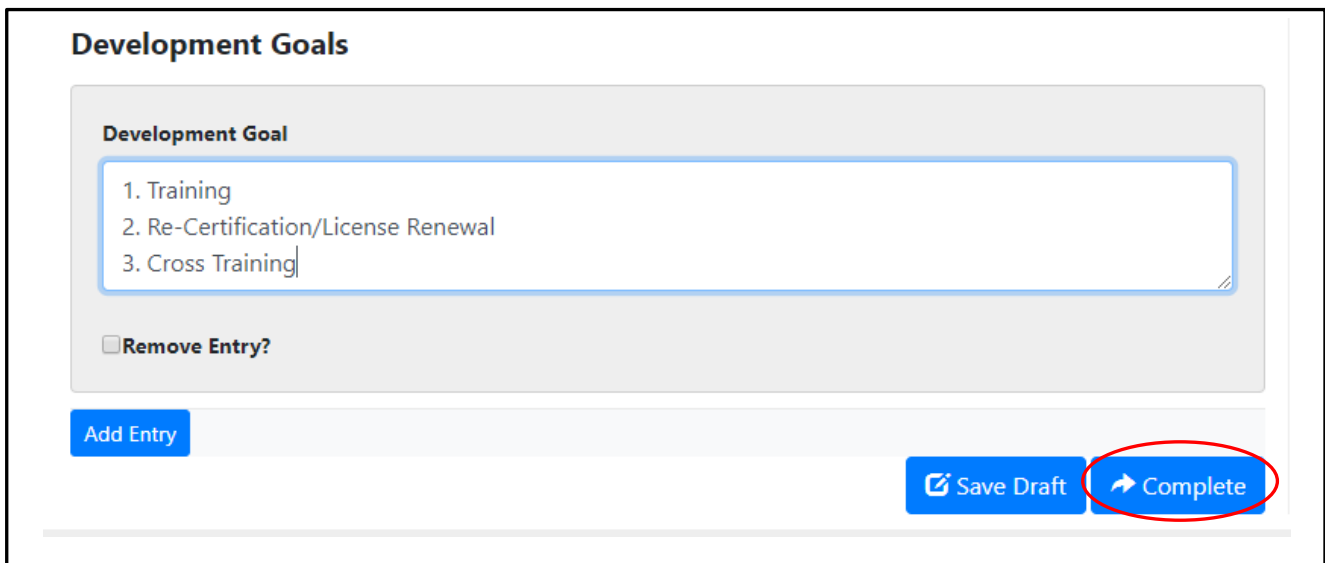
**Save Draft** **Next >**

The **second tab** section is the **Development Goals**. On this tab, you will enter any Development activities associated with the specific employee. Development activities may include such items as: training workshops, technical skills training, professional certifications and/or conferences, etc. Please label each goal or activity that is added.



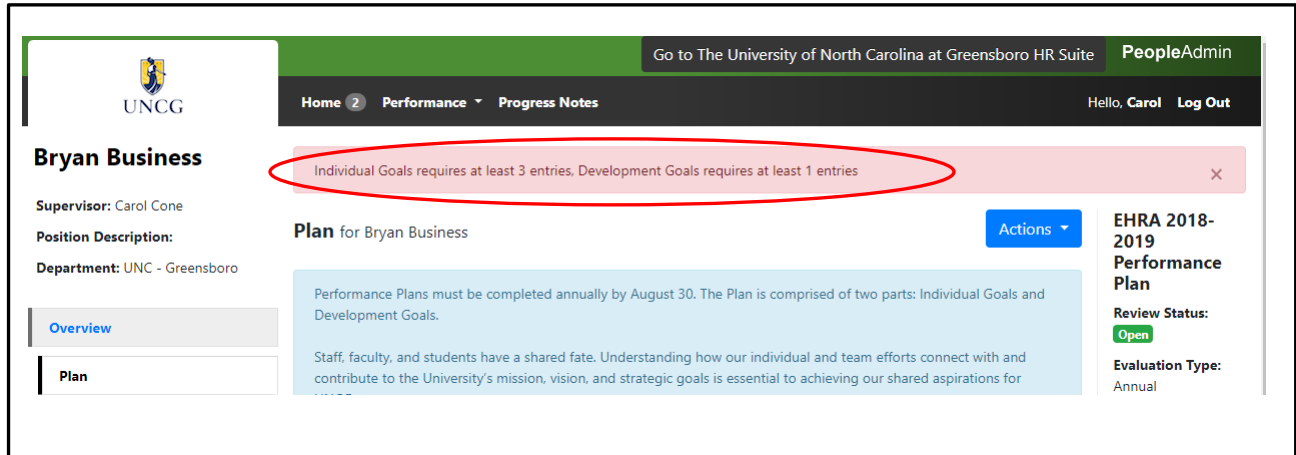
The screenshot shows a web interface with two tabs: 'Individual Goals' and 'Development Goals'. The 'Development Goals' tab is selected and circled in red. Below the tabs, there is a text area with instructions: 'Establish 3 to 5 SMART (specific, measurable, attainable, relevant, and timed) performance goals at the beginning of the performance cycle to support UNCG's strategic goals. Goals must be mutually agreed upon and reflect the most important priorities for the performance review period. At the end of the cycle, check the appropriate rating (1-Not Meeting, 2-Meeting, or 3-Exceeding) based on the employee's progress.' A 'Check spelling' link is visible. Below the text area, it says 'Once completed click "Next" at the bottom of the page to move you to the Development Goals' and 'Required fields are indicated with an asterisk (\*)'.

**Each employee should have at least one Development Goal or activity each performance cycle. (Note: Development activities are strongly encouraged as a 'best practice' and should be updated on an annual basis)**



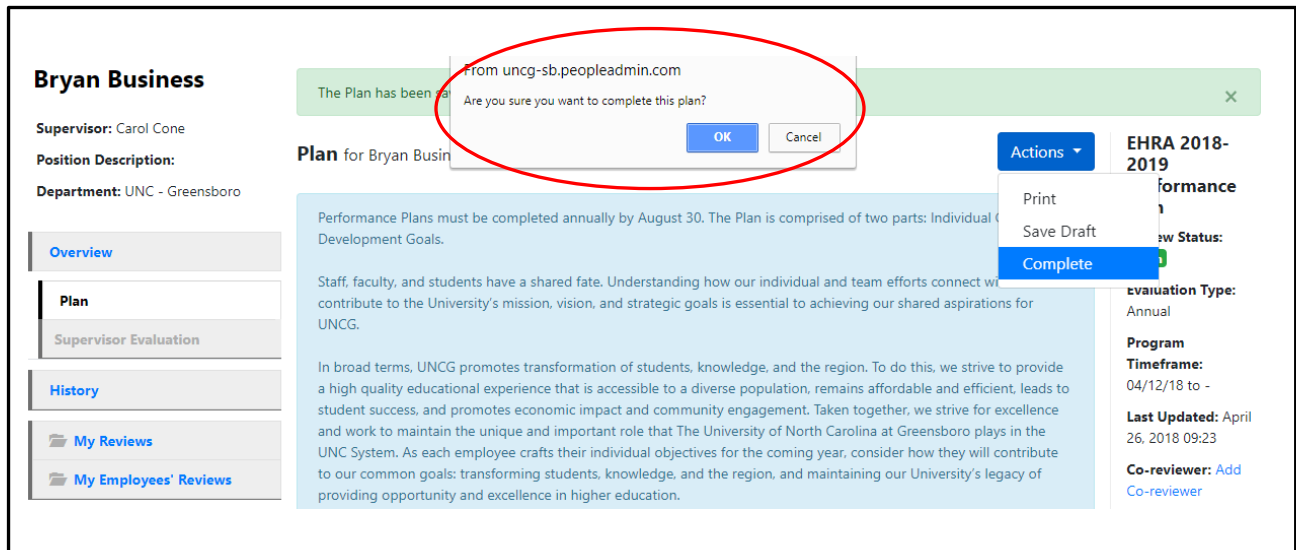
The screenshot shows the 'Development Goals' form. It has a title 'Development Goals' and a section 'Development Goal' with a text area containing a list: '1. Training', '2. Re-Certification/License Renewal', and '3. Cross Training'. Below the text area is a checkbox labeled 'Remove Entry?'. At the bottom of the form, there are three buttons: 'Add Entry', 'Save Draft', and 'Complete'. The 'Complete' button is circled in red.

If you fail to complete any of the required sections in the plan you will see the message below and the plan will remain in draft mode. The message will give a general indication as to why the process was unable to be completed. Correct these errors and click the **'Complete'** button again to finish this task.



The screenshot shows the 'Plan for Bryan Business' page. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes'. Below the navigation bar, the user's name 'Hello, Carol' and 'Log Out' are visible. The main content area displays the plan details for 'Bryan Business', including the supervisor 'Carol Cone' and the department 'UNC - Greensboro'. A red oval highlights a pink error message at the top of the plan area: 'Individual Goals requires at least 3 entries, Development Goals requires at least 1 entries'. Below the error message, there is a blue box with instructions: 'Performance Plans must be completed annually by August 30. The Plan is comprised of two parts: Individual Goals and Development Goals.' and a paragraph of text: 'Staff, faculty, and students have a shared fate. Understanding how our individual and team efforts connect with and contribute to the University's mission, vision, and strategic goals is essential to achieving our shared aspirations for...'. On the right side, there is a sidebar with 'EHRA 2018-2019 Performance Plan' details, including 'Review Status: Open' and 'Evaluation Type: Annual'. An 'Actions' button is visible next to the plan title.

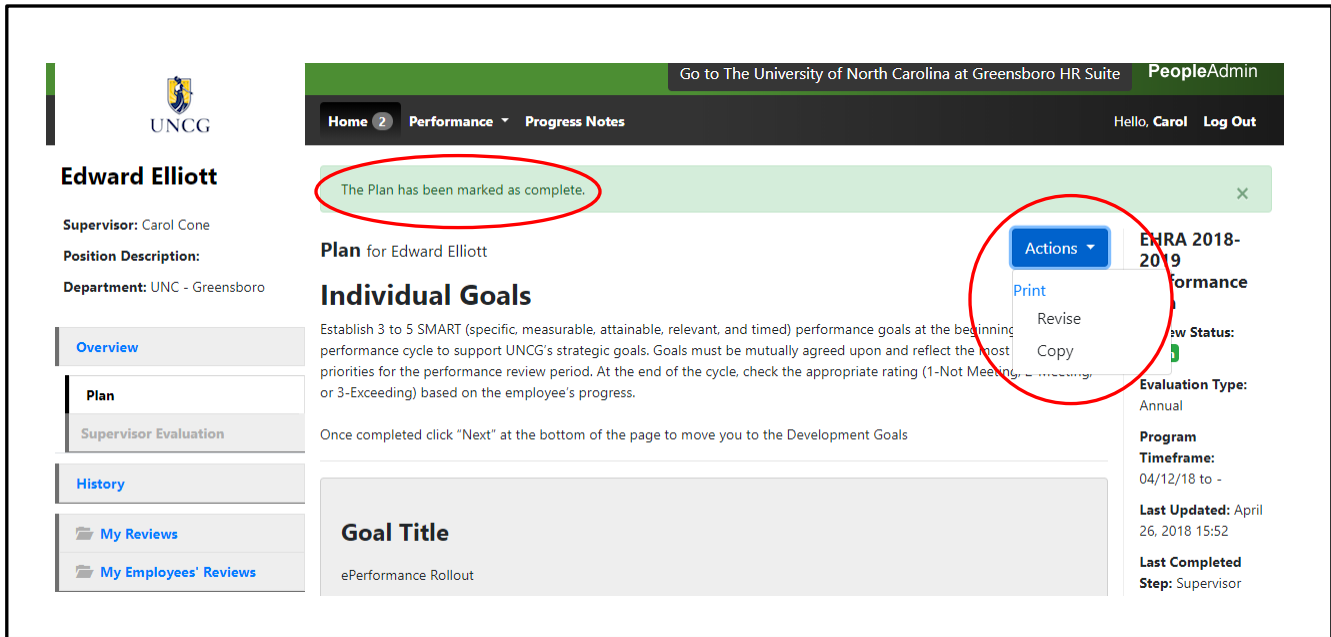
When you click the **'Complete'** button the system will always ask you if you are sure you want to complete the action requested. Click **'OK'** only when you are sure you are finished with the plan creation. If you complete the action before you are done completing the plan, the action can only be re-opened by a HR administrator.



The screenshot shows the same 'Plan for Bryan Business' page as the previous image. A red oval highlights a confirmation dialog box that has appeared. The dialog box contains the text: 'From uncg-sb.peopleadmin.com' and 'Are you sure you want to complete this plan?'. Below the text are two buttons: 'OK' and 'Cancel'. The background of the page is dimmed, and the 'Actions' menu is open, showing options: 'Print', 'Save Draft', and 'Complete'. The 'Complete' option is highlighted in blue.

If your plan goes through successfully, you will see the following message at the top of your screen. The completed plan document will be available for you to print and/or copy via the **'Actions'** button.

You can copy the completed performance plan to your other employees, who are in like positions, by clicking the **'Actions'** button. This will begin the copying process.



If you would like to copy a performance plan to like positions, go to the section of this guide titled **'Copy Performance Plan to Other Like Positions'**. If you have already clicked the copy button as depicted below, you should start from this point in the directions below.

### Copy Performance Plan to Other Like Positions

If you have like positions that will have the same or similar performance plans, you can use these instructions to copy an already completed performance plan (which you created for one employee) to your other direct reports.

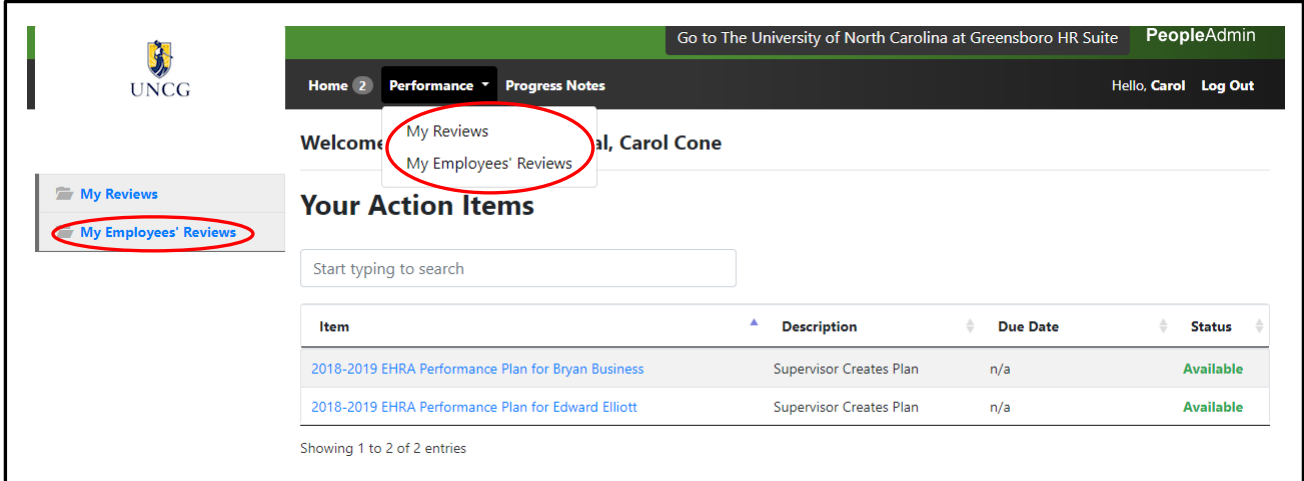
To copy a EHRA Performance Plan, log into SpartanTalent e-Performance Management (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.



Once logged in, click the **'Go to ePerformance'** link in the upper 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 SpartanTalent ePerformance portal, the first screen you will see is **'Your Action Items'**. Once here, click **'My Employee Reviews'** on the left navigation or via the 'Performance' dropdown to take you to the 'Reviews Dashboard'



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

Home 2 Performance Progress Notes Hello, Carol Log Out

Welcome **Carol Cone**

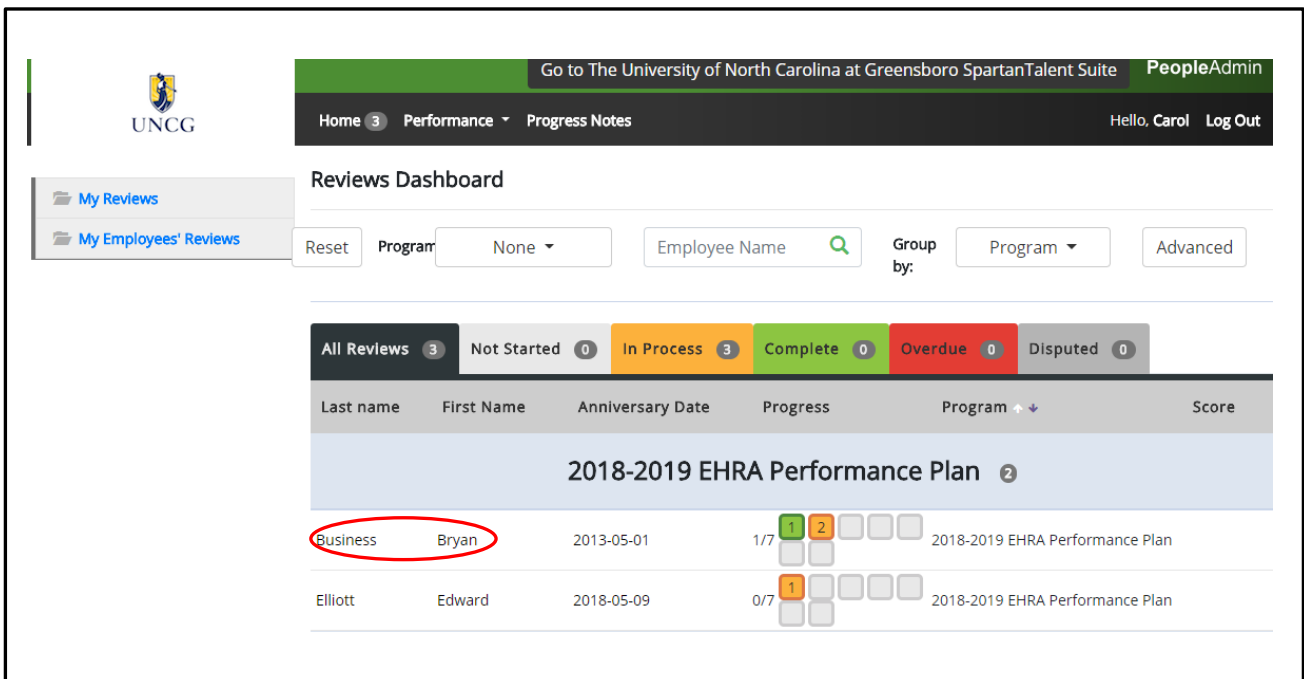
**Your Action Items**

Start typing to search

Item	Description	Due Date	Status
<a href="#">2018-2019 EHRA Performance Plan for Bryan Business</a>	Supervisor Creates Plan	n/a	Available
<a href="#">2018-2019 EHRA Performance Plan for Edward Elliott</a>	Supervisor Creates Plan	n/a	Available

Showing 1 to 2 of 2 entries

The 'Reviews Dashboard' will appear for you to locate the specific employee and associated program from which you want to copy the Performance Plan. Click the employee's name to access their Performance Plan.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 3 Performance Progress Notes Hello, Carol Log Out

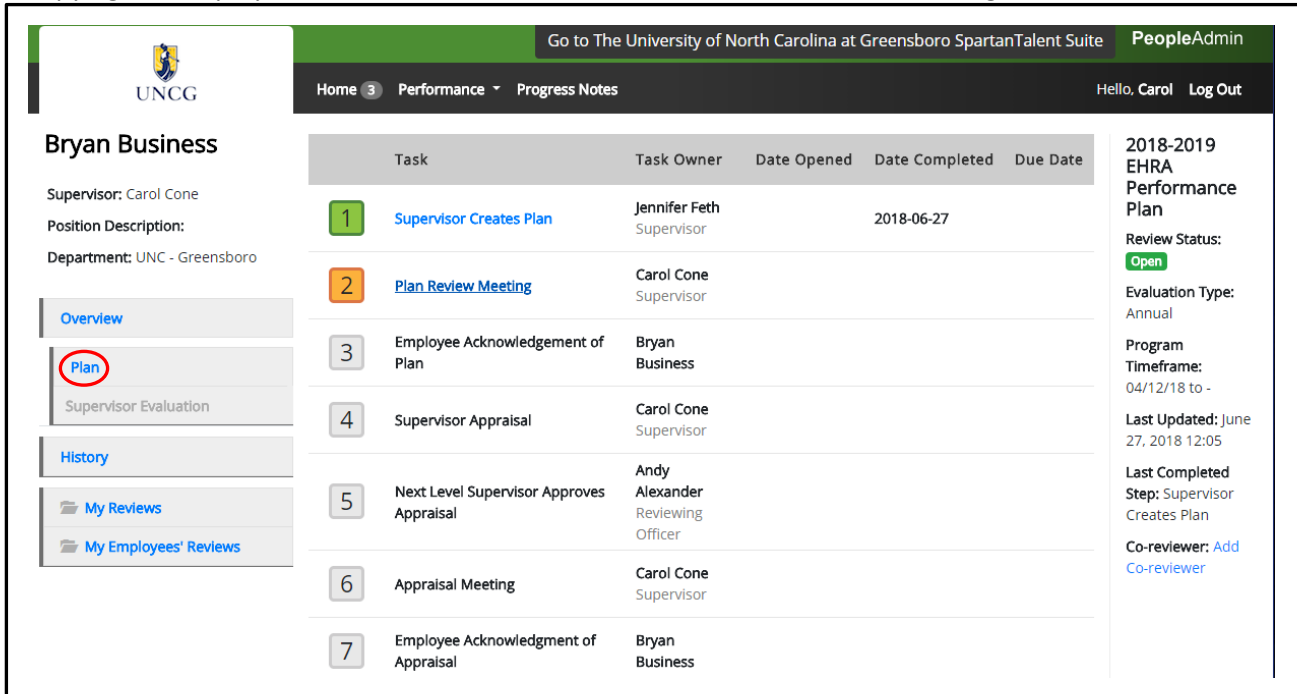
**Reviews Dashboard**

Reset Program **None** Employee Name  Group by: Program **Program** Advanced

All Reviews 3 Not Started 0 In Process 3 Complete 0 Overdue 0 Disputed 0

Last name	First Name	Anniversary Date	Progress	Program	Score
<b>2018-2019 EHRA Performance Plan 2</b>					
<b>Business</b>	<b>Bryan</b>	2013-05-01	1/7	2018-2019 EHRA Performance Plan	
Elliott	Edward	2018-05-09	0/7	2018-2019 EHRA Performance Plan	

You can view any completed or open item from the 'Overview' screen at any time. In this case, to begin copying this employee's Performance Plan, click on the 'Plan' link in the left navigation.

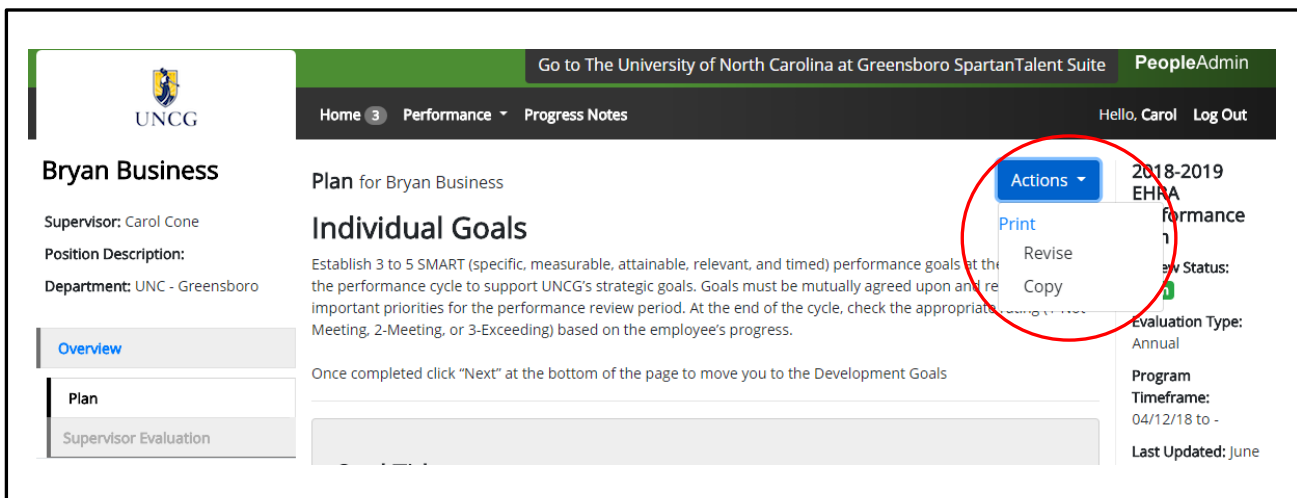


The screenshot shows the UNCG PeopleAdmin interface. The left navigation menu has the 'Plan' link highlighted with a red circle. The main content area displays a table of tasks for 'Bryan Business'.

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Jennifer Feth Supervisor		2018-06-27	
2 Plan Review Meeting	Carol Cone Supervisor			
3 Employee Acknowledgement of Plan	Bryan Business			
4 Supervisor Appraisal	Carol Cone Supervisor			
5 Next Level Supervisor Approves Appraisal	Andy Alexander Reviewing Officer			
6 Appraisal Meeting	Carol Cone Supervisor			
7 Employee Acknowledgment of Appraisal	Bryan Business			

On the right side of the interface, there is a summary for the '2018-2019 EHRA Performance Plan' with details such as 'Review Status: Open', 'Evaluation Type: Annual', and 'Last Updated: June 27, 2018 12:05'.

The Plan for the employee will open. Click the 'Actions' button and choose 'Copy' to begin copying the Plan.



The screenshot shows the 'Plan for Bryan Business' page. The 'Actions' dropdown menu is open, and the 'Copy' option is highlighted with a red circle. The page title is 'Individual Goals'.

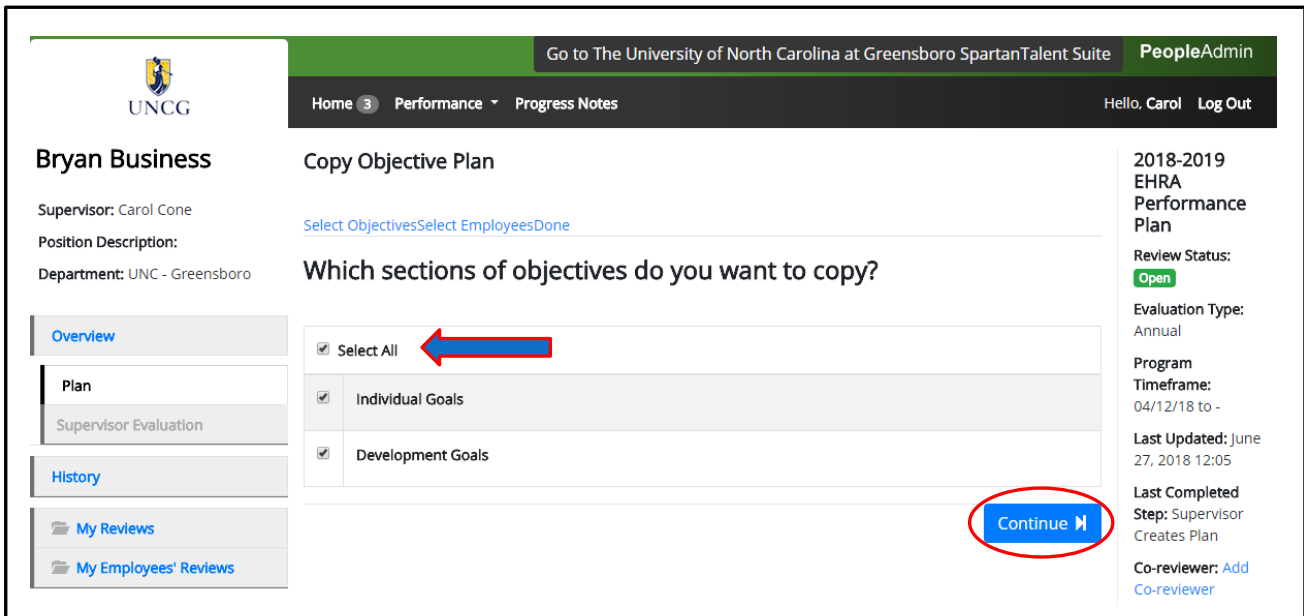
**Individual Goals**  
Establish 3 to 5 SMART (specific, measurable, attainable, relevant, and timed) performance goals at the beginning of the performance cycle to support UNCG's strategic goals. Goals must be mutually agreed upon and reflect the most important priorities for the performance review period. At the end of the cycle, check the appropriate rating (1-Meeting, 2-Meeting, or 3-Exceeding) based on the employee's progress.

Once completed click "Next" at the bottom of the page to move you to the Development Goals

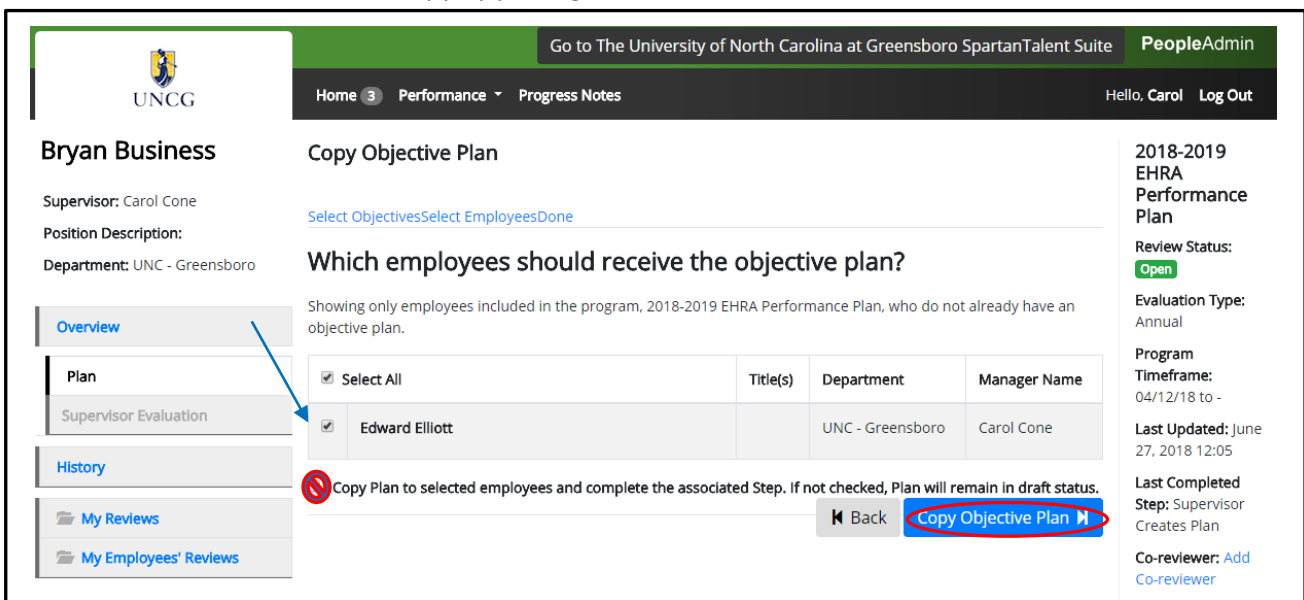
The right side of the interface shows the same summary for the '2018-2019 EHRA Performance Plan' as in the previous screenshot.



The screen below will appear. Select the performance components you want to copy (Individual goals, Developmental goals) or click ‘Select all’ and then hit the ‘Continue’ button.



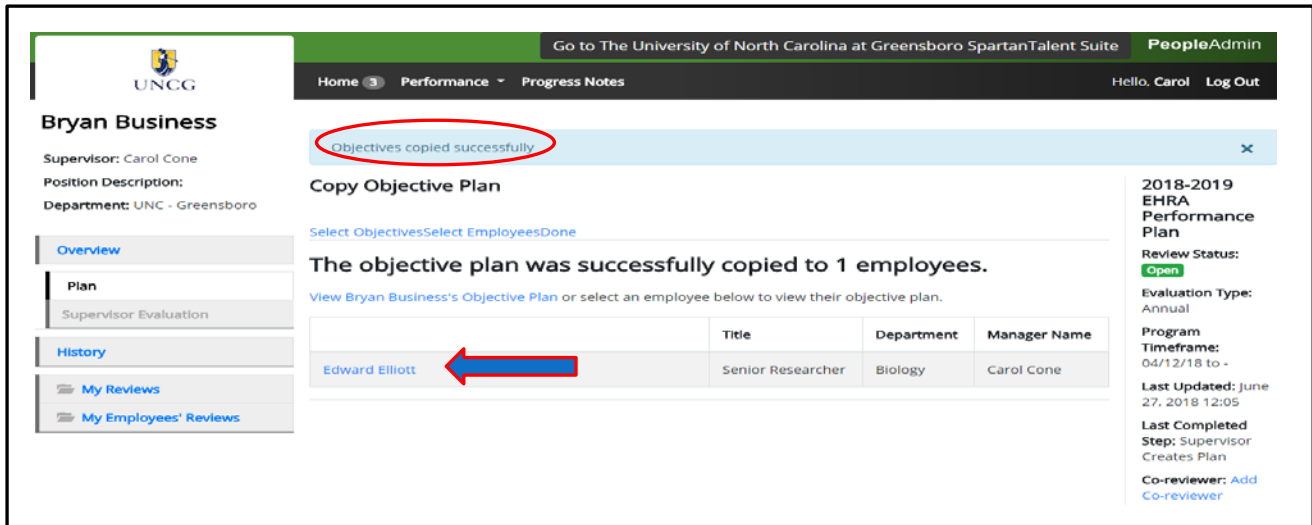
When you arrive at the ‘Select Employees’ tab, select the employees under your supervision to whom you want this Performance Plan to copy by putting a check mark in the box next to their name(s).



You should review the copied performance plans before sending them to the next level supervisor to ensure that all the elements are copied correctly. (Sometimes the SpartanTalent ePerformance system updates can cause glitches in the system that may affect the copy function, causing some selected copy items to be left blank.)

For this reason, it is **not recommended** that you select/click the box that reads ‘Copy Plan to selected employees and complete the associated step...’ Click the ‘Copy Objective Plan’ button to proceed.

The Performance Plan has now been successfully copied to the employees you selected. Click the employee's name to review the plan and make any necessary edits and finalize. You can also find the plans you copied in your 'Action Items' box which can be found by clicking the 'Home' button at the top of your screen. They will be labeled 'Performance Plan Creation' until you click the 'Complete' button on the final tab of the plan document.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home Performance Progress Notes Hello, Carol Log Out

**Bryan Business**

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

Objectives copied successfully

**Copy Objective Plan**

Select Objectives Select Employees Done

The objective plan was successfully copied to 1 employees.

View Bryan Business's Objective Plan or select an employee below to view their objective plan.

	Title	Department	Manager Name
Edward Elliott	Senior Researcher	Biology	Carol Cone

2018-2019  
EHRA  
Performance  
Plan

Review Status:  
Open

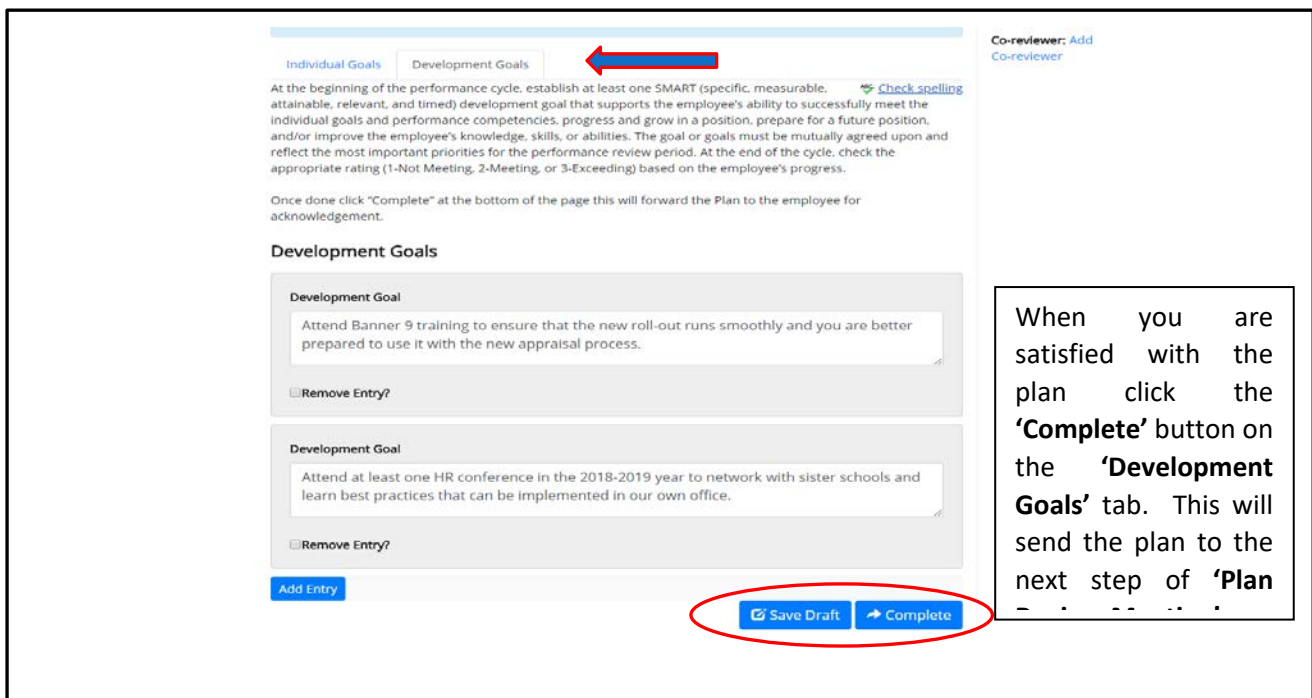
Evaluation Type:  
Annual

Program  
Timeframe:  
04/12/18 to -

Last Updated: June  
27, 2018 12:05

Last Completed  
Step: Supervisor  
Creates Plan

Co-reviewer: Add  
Co-reviewer



Individual Goals Development Goals

At the beginning of the performance cycle, establish at least one SMART (specific, measurable, attainable, relevant, and timed) development goal that supports the employee's ability to successfully meet the individual goals and performance competencies, progress and grow in a position, prepare for a future position, and/or improve the employee's knowledge, skills, or abilities. The goal or goals must be mutually agreed upon and reflect the most important priorities for the performance review period. At the end of the cycle, check the appropriate rating (1-Not Meeting, 2-Meeting, or 3-Exceeding) based on the employee's progress.

Once done click "Complete" at the bottom of the page this will forward the Plan to the employee for acknowledgement.

**Development Goals**

Development Goal

Attend Banner 9 training to ensure that the new roll-out runs smoothly and you are better prepared to use it with the new appraisal process.

Remove Entry?

Development Goal

Attend at least one HR conference in the 2018-2019 year to network with sister schools and learn best practices that can be implemented in our own office.

Remove Entry?

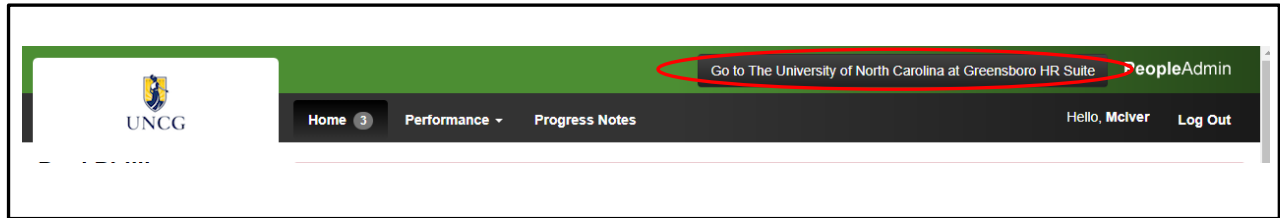
Add Entry

Save Draft Complete

Co-reviewer: Add  
Co-reviewer

When you are satisfied with the plan click the 'Complete' button on the 'Development Goals' tab. This will send the plan to the next step of 'Plan'

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.



## Completing the Supervisor/Employee Performance Plan Review Meeting



Once the Supervisor has completed the Performance Plan, this information will route immediately to the employee for acknowledgement.

Once the Supervisor has completed the Performance Plan, this information will route immediately to the Next-Level Supervisor for consideration/comments.

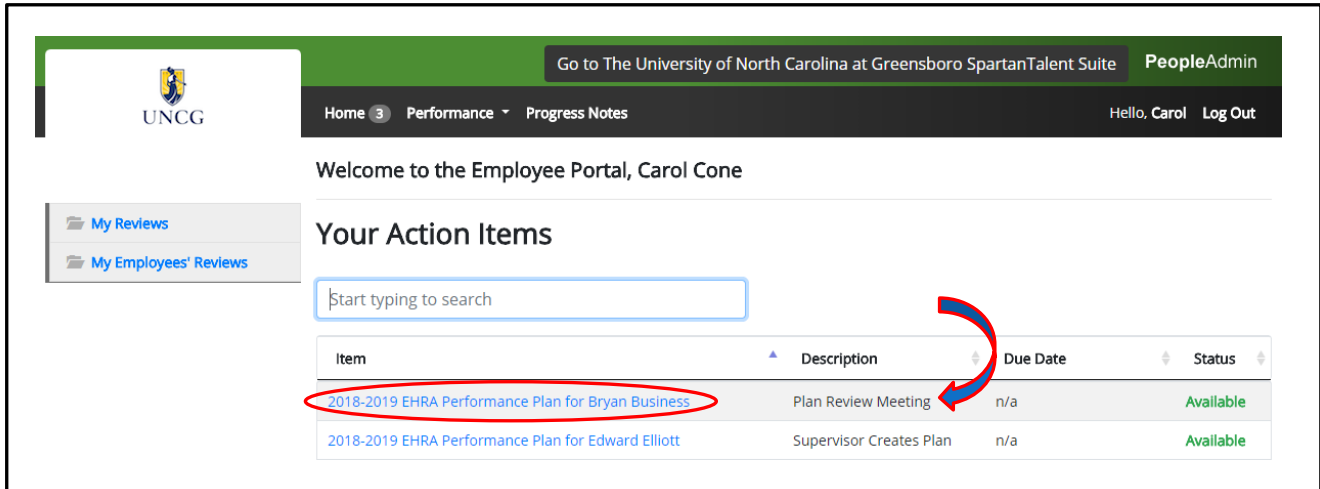
To review and approve an EHRA Performance Plan, log into SpartanTalent ePerformance Management (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.



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 log in as any user type.**

After you have completed the Performance Plan for your employee, you will see **'Plan Review Meeting'** in **'Your Action Items'**. This indicates that it is time to schedule/conduct a Supervisor/Employee Performance Plan Discussion. 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.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 3 Performance Progress Notes Hello, Carol Log Out

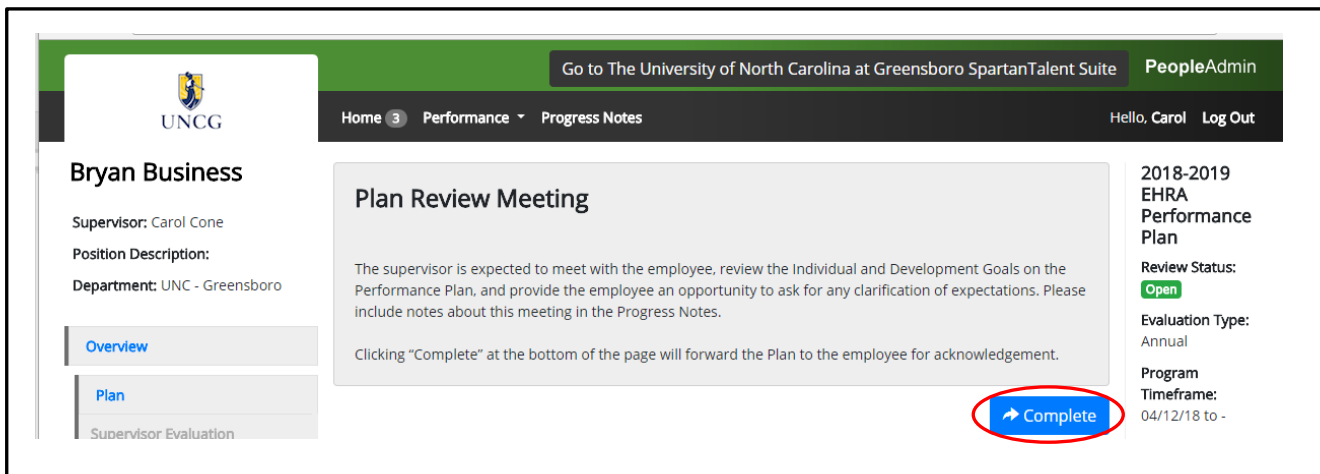
Welcome to the Employee Portal, Carol Cone

**Your Action Items**

Start typing to search

Item	Description	Due Date	Status
2018-2019 EHRA Performance Plan for Bryan Business	Plan Review Meeting	n/a	Available
2018-2019 EHRA Performance Plan for Edward Elliott	Supervisor Creates Plan	n/a	Available

This Process step should only be marked as **'Complete'** only after the Supervisor/Employee Performance Plan Discussion has been conducted. (Note: When you select the **'Complete'** button associated with this process step, the Performance Plan is routed immediately to the employee for his/her review and acknowledgement.)



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 3 Performance Progress Notes Hello, Carol Log Out

**Bryan Business**

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

Overview  
Plan  
Supervisor Evaluation

**Plan Review Meeting**

The supervisor is expected to meet with the employee, review the Individual and Development Goals on the Performance Plan, and provide the employee an opportunity to ask for any clarification of expectations. Please include notes about this meeting in the Progress Notes.

Clicking "Complete" at the bottom of the page will forward the Plan to the employee for acknowledgement.

2018-2019 EHRA Performance Plan

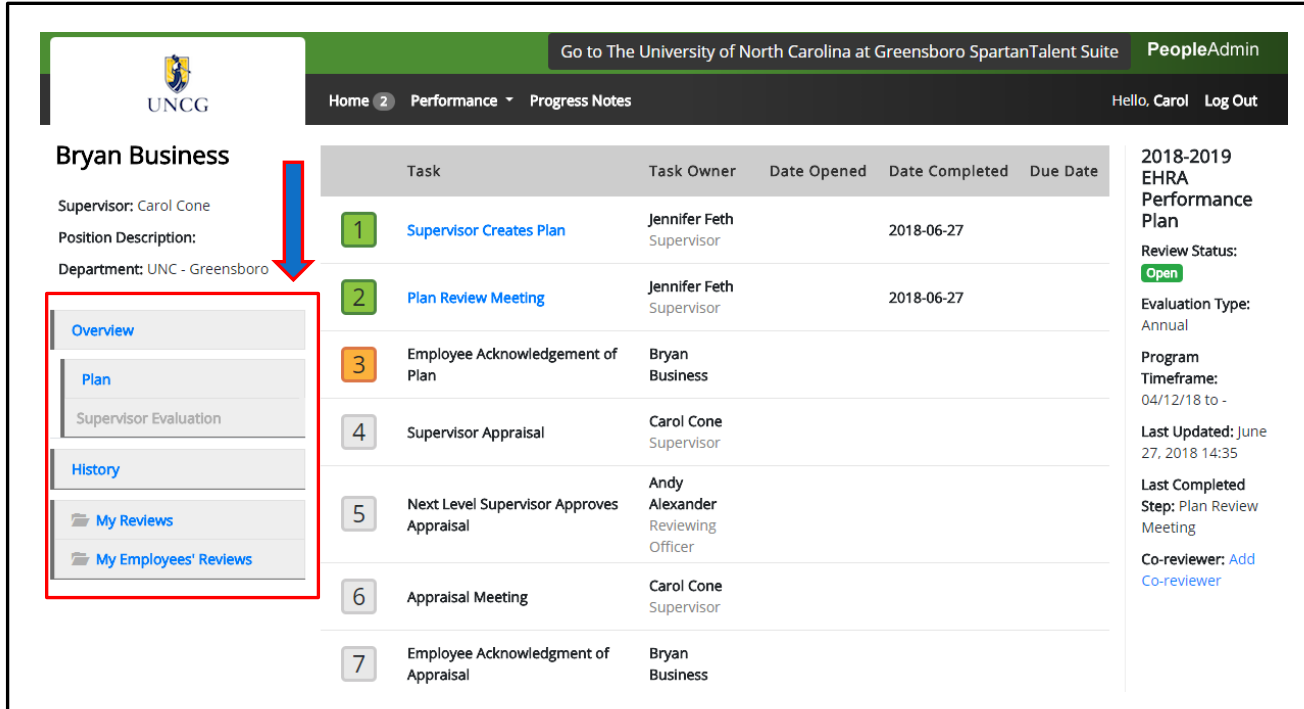
Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

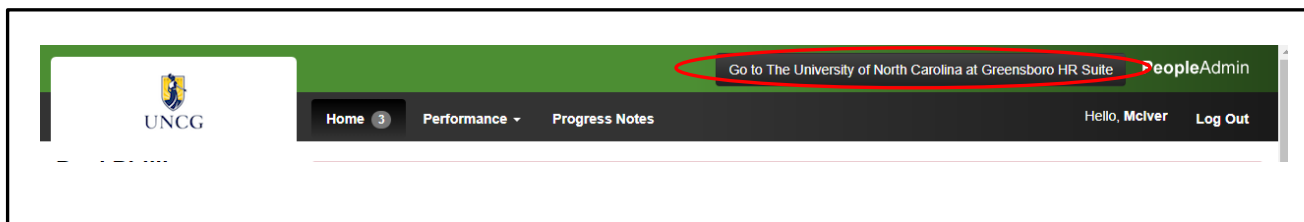
**Complete**

Once you have acknowledged that you have conducted the Performance Plan Review Meeting with your employee, by clicking the **‘Complete’** button, the following screen will appear. On this screen, you may review your employee’s Plan, the Approvals and Acknowledgements, and you may also add Progress Notes if you choose.



The screenshot shows the 'Bryan Business' performance plan review page. A red box highlights the sidebar navigation menu, which includes 'Overview', 'Plan', 'Supervisor Evaluation', 'History', 'My Reviews', and 'My Employees' Reviews'. A blue arrow points from the 'Plan' option in the sidebar to the 'Plan Review Meeting' task in the main table. The table lists tasks 1 through 7, including 'Supervisor Creates Plan', 'Plan Review Meeting', 'Employee Acknowledgement of Plan', 'Supervisor Appraisal', 'Next Level Supervisor Approves Appraisal', 'Appraisal Meeting', and 'Employee Acknowledgment of Appraisal'. The right sidebar shows details for the '2018-2019 EHRA Performance Plan', including 'Review Status: Open', 'Evaluation Type: Annual', and 'Program Timeframe: 04/12/18 to -'.

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.



The screenshot shows the top navigation bar of the system. The 'Go to The University of North Carolina at Greensboro HR Suite' button is circled in red. Other elements include the UNCG logo, the 'PeopleAdmin' user name, and navigation links for 'Home', 'Performance', and 'Progress Notes'.

## Annual Review Process Steps

Note: Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your employee appraisals.



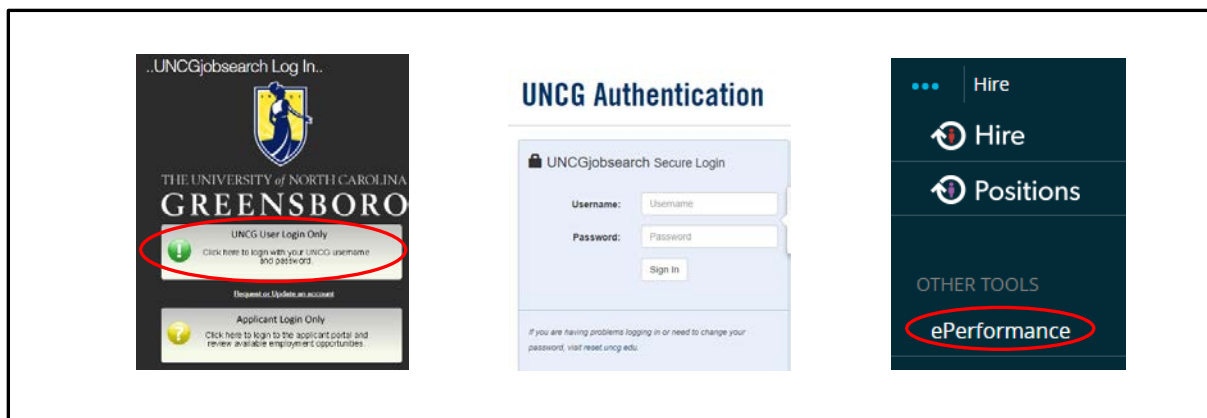
## Supervisor Appraisal

4

Supervisor Appraisal

**Carol Cone**  
Supervisor

To begin the Supervisor Appraisal process, log into SpartanTalent ePerformance Management at (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.

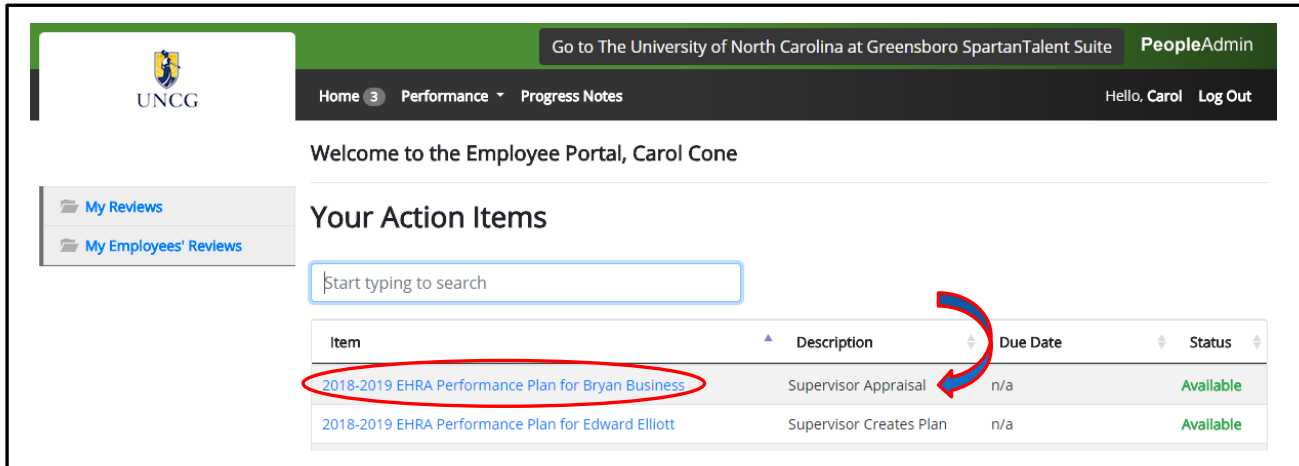


Once logged in, click the 'Go to ePerformance' link in the upper left-hand corner of your page

**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 an employee appraisal or evaluation, select the description title that reads 'Supervisor Appraisal'.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 3 Performance ▾ Progress Notes Hello, Carol Log Out

Welcome to the Employee Portal, Carol Cone

**Your Action Items**

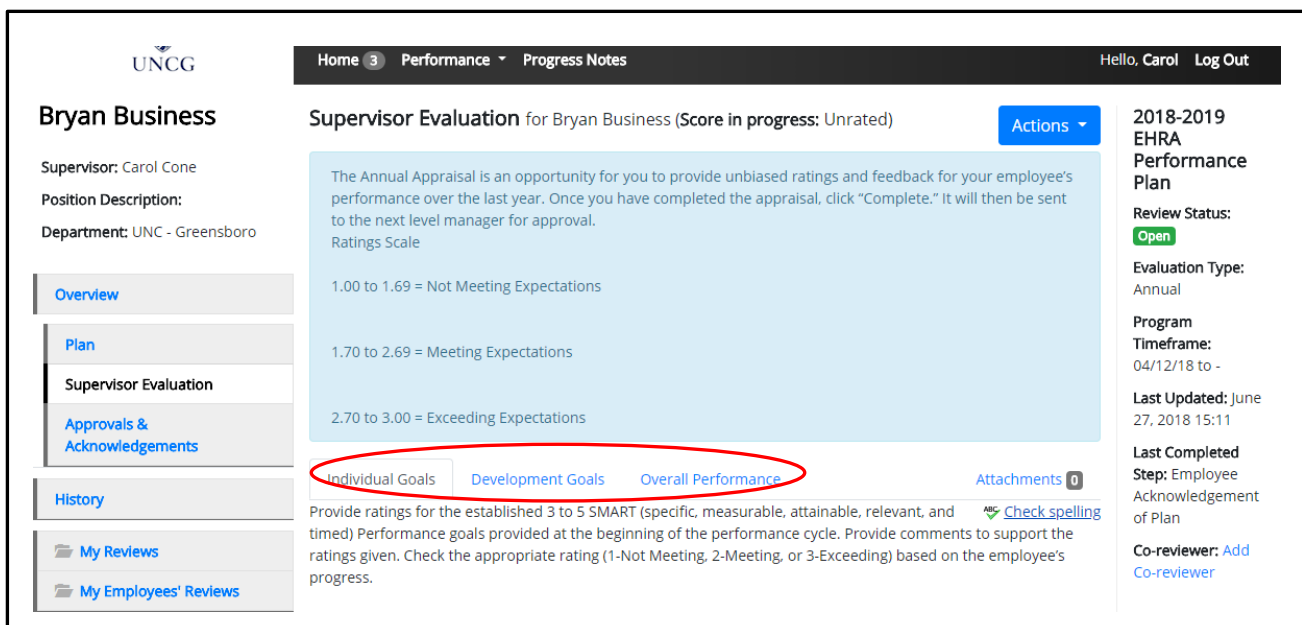
Start typing to search

Item	Description	Due Date	Status
2018-2019 EHRA Performance Plan for Bryan Business	Supervisor Appraisal	n/a	Available
2018-2019 EHRA Performance Plan for Edward Elliott	Supervisor Creates Plan	n/a	Available

Once selected, the Supervisor Evaluation will appear. There are **three (3) tab sections** across the top of the Supervisor Evaluation.

The first tab section is titled 'Individual Goals' the second tab is 'Development Goals' and the last tab is for 'Overall Performance'. On the first two tabs, you will enter a rating of 'Not Meeting Expectations, Meeting Expectations or Exceeding Expectations. After you choose a rating, provide comments to support the rating in the comment box below the rating box.

On the last tab 'Overall Performance' use the comment box to summarize the employee performance that encompasses the entire year. Reference progress notes and add any attachments to support your evaluation if needed.



UNC

Home 3 Performance ▾ Progress Notes Hello, Carol Log Out

**Bryan Business**

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

Overview  
Plan  
Supervisor Evaluation  
Approvals & Acknowledgements  
History

My Reviews  
My Employees' Reviews

**Supervisor Evaluation** for Bryan Business (Score in progress: Unrated) **Actions ▾**

The Annual Appraisal is an opportunity for you to provide unbiased ratings and feedback for your employee's performance over the last year. Once you have completed the appraisal, click "Complete." It will then be sent to the next level manager for approval.

Ratings Scale

- 1.00 to 1.69 = Not Meeting Expectations
- 1.70 to 2.69 = Meeting Expectations
- 2.70 to 3.00 = Exceeding Expectations

Individual Goals Development Goals Overall Performance Attachments 0

Provide ratings for the established 3 to 5 SMART (specific, measurable, attainable, relevant, and timed) Performance goals provided at the beginning of the performance cycle. Provide comments to support the ratings given. Check the appropriate rating (1-Not Meeting, 2-Meeting, or 3-Exceeding) based on the employee's progress. [Check spelling](#)

**2018-2019 EHRA Performance Plan**  
Review Status: **Open**  
Evaluation Type: Annual  
Program  
Timeframe: 04/12/18 to -  
Last Updated: June 27, 2018 15:11  
Last Completed Step: Employee Acknowledgement of Plan  
Co-reviewer: [Add Co-reviewer](#)

## Individual Goals

**Goal Title:**

e-Performance Roll-out

**Description:**

Create training documents for employees and supervisors detailing the specifics around navigating the new e-Performance program.

Develop training guides, power point presentations, a training lab, quick start guides and campus communication no later than August 1, 2018


**\* Rating**


Please select ▼

**Comments (optional)**

When you reach the bottom of each page and have completed comments for each goal, you may click the **'Save Draft'** or **'Next'**. Choosing the **'Save Draft'** button will allow you to come back and complete the evaluation at a later point in time. Choosing the **'Next'** button will move you forward to the next tab section.

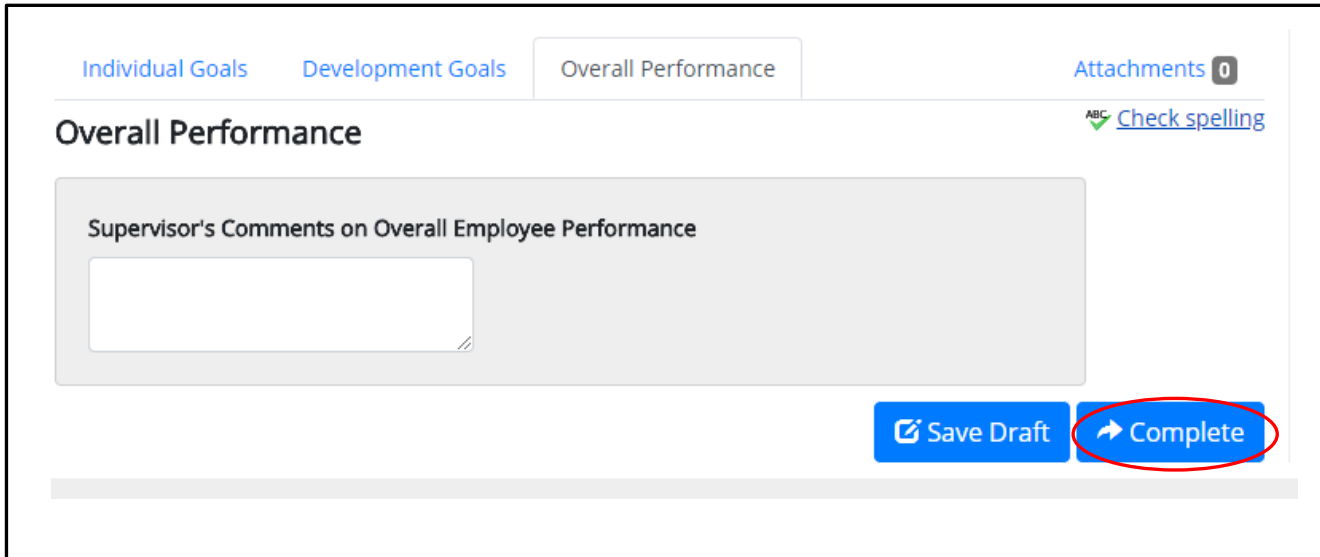
Note: Choosing the **'Next'** button will enable auto save for the work you just completed.

 Save Draft

Next 



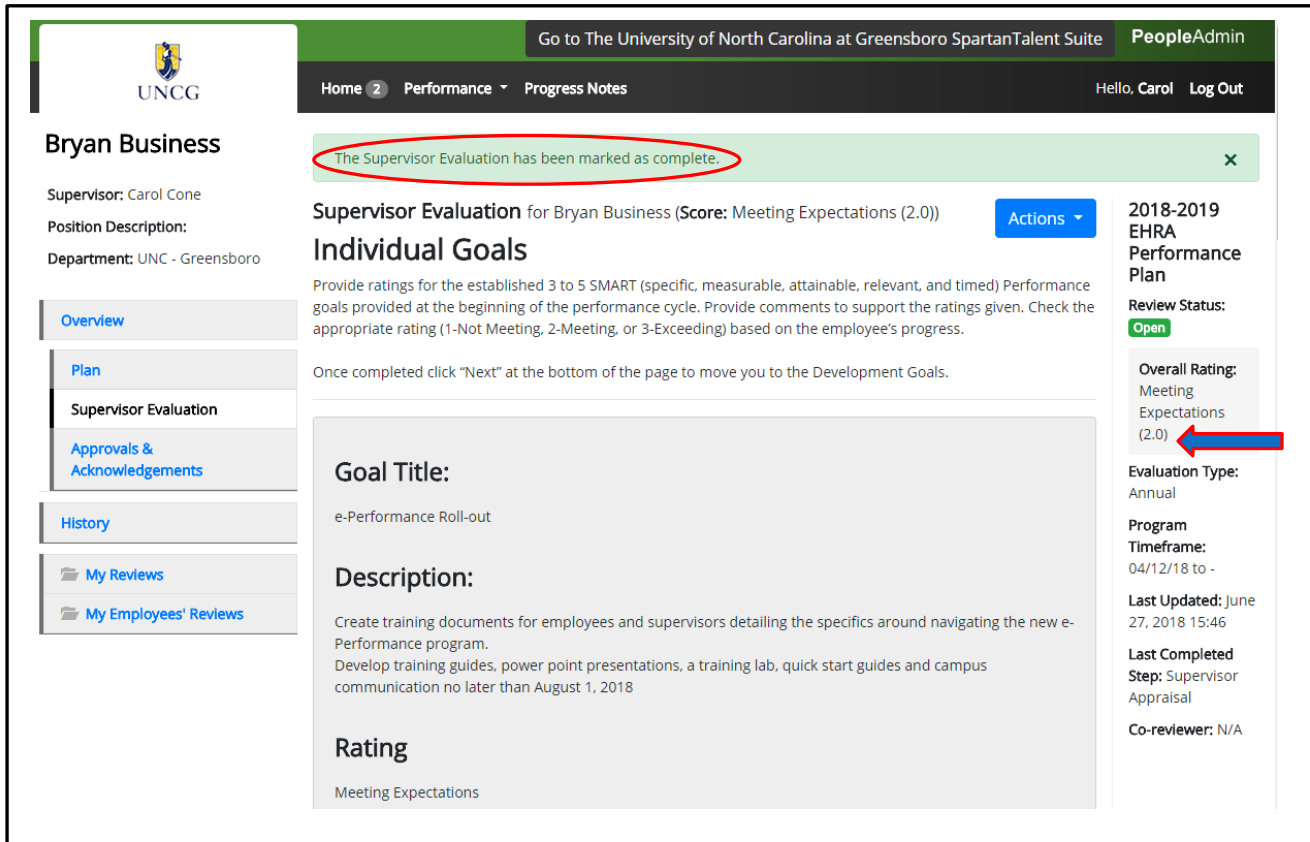
Note: All fields must be completed by the Supervisor before the process can be marked as complete. Once you have completed the appraisal, click **'Complete'**. It will then be sent to the Next-Level Supervisor for approval.



When you select the **'Complete'** button, the following warning screen will appear. Please ensure all necessary information has been entered/completed prior to clicking **'OK'**. If you complete the action in error, you will need to contact the HR system administrator to re-open the task for you.



After you have completed the appraisal and have clicked 'OK' you will see a prompt at the top of your screen indicating that your evaluation has been marked as complete. You will also see your 'Overall Rating', along with the numerical score based on the weights you assigned at the beginning of the year on the right of your screen.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance Progress Notes Hello, Carol Log Out

**Bryan Business**

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

The Supervisor Evaluation has been marked as complete. X

**Supervisor Evaluation for Bryan Business (Score: Meeting Expectations (2.0))** Actions

**2018-2019 EHRA Performance Plan**  
Review Status: Open  
Overall Rating: Meeting Expectations (2.0)  
Evaluation Type: Annual  
Program Timeframe: 04/12/18 to -  
Last Updated: June 27, 2018 15:46  
Last Completed Step: Supervisor Appraisal  
Co-reviewer: N/A

**Individual Goals**

Provide ratings for the established 3 to 5 SMART (specific, measurable, attainable, relevant, and timed) Performance goals provided at the beginning of the performance cycle. Provide comments to support the ratings given. Check the appropriate rating (1-Not Meeting, 2-Meeting, or 3-Exceeding) based on the employee's progress.

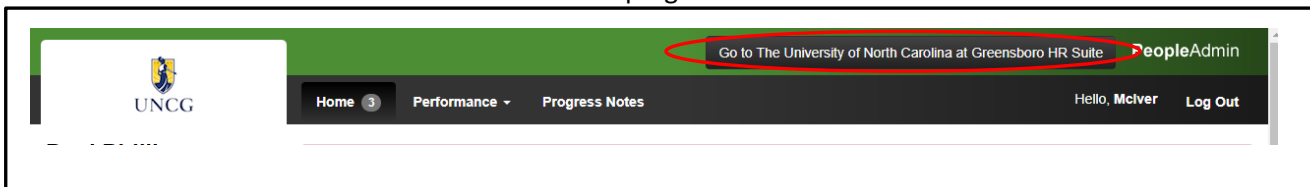
Once completed click "Next" at the bottom of the page to move you to the Development Goals.

**Goal Title:**  
e-Performance Roll-out

**Description:**  
Create training documents for employees and supervisors detailing the specifics around navigating the new e-Performance program.  
Develop training guides, power point presentations, a training lab, quick start guides and campus communication no later than August 1, 2018

**Rating**  
Meeting Expectations

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**

Home 3 Performance Progress Notes Hello, McIver Log Out

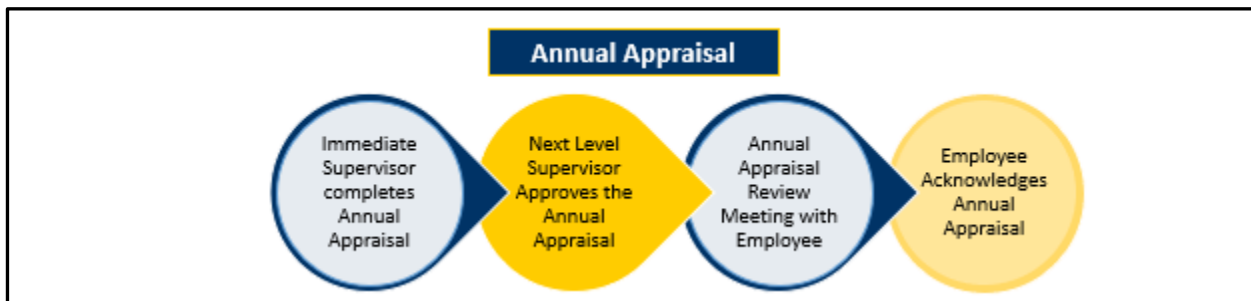
## Next-Level Supervisor Approves Appraisal

5

Next Level Supervisor Approves Appraisal

Andy  
Alexander  
Reviewing  
Officer

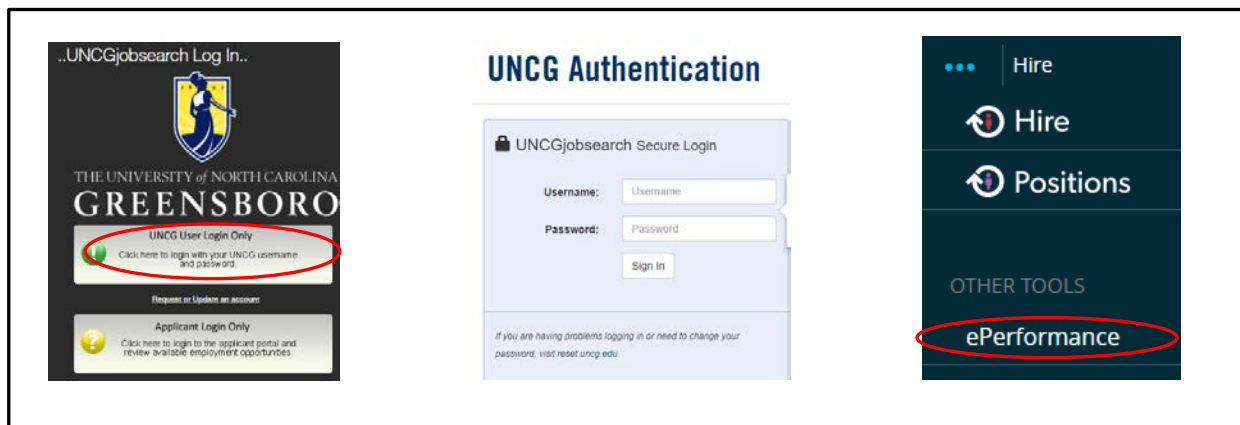
## Annual Appraisal Process Steps



Note: Reference Progress Notes and/or Off-Cycle as necessary when reviewing the appraisal if needed.

Once the Supervisor has completed the Supervisor Appraisal, this information will route immediately to the Next-Level Supervisor for consideration/comments.

To approve an EHRA Supervisor Appraisal, log into SpartanTalent ePerformance Management at (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.

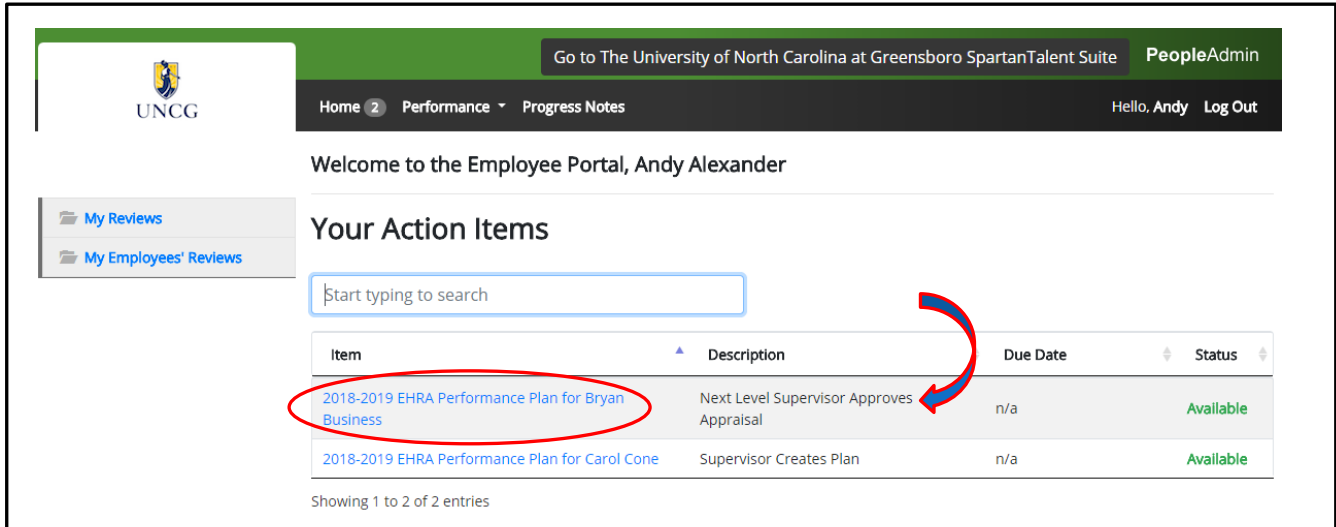


Once logged in, click the 'Go to ePerformance' link in the upper left-hand corner of your page

**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 review the Supervisor Evaluation, select the description title that reads **'Next-Level Supervisor Approves Appraisal'**.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance Progress Notes Hello, Andy Log Out

Welcome to the Employee Portal, Andy Alexander

### Your Action Items

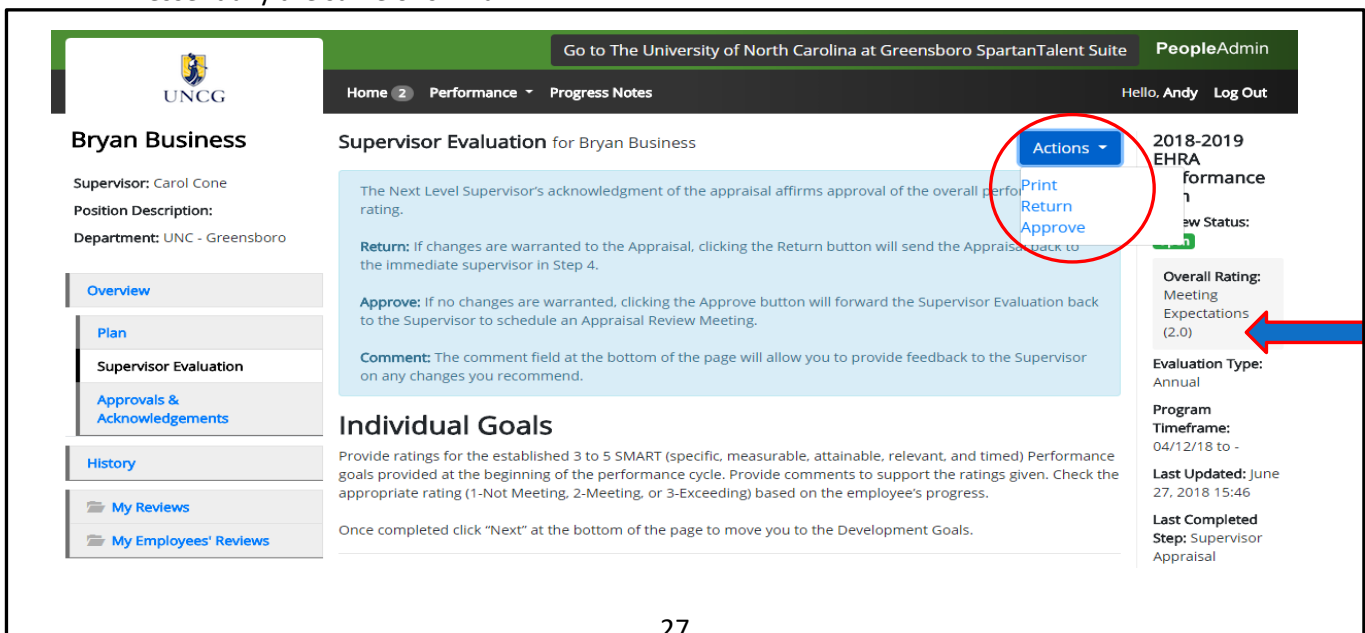
Start typing to search

Item	Description	Due Date	Status
2018-2019 EHRA Performance Plan for Bryan Business	Next Level Supervisor Approves Appraisal	n/a	Available
2018-2019 EHRA Performance Plan for Carol Cone	Supervisor Creates Plan	n/a	Available

Showing 1 to 2 of 2 entries

**Remember!** You should be reviewing the appraisals to make sure your supervisors have done the following:

- Complied with EHRA Performance Appraisal Guidelines by inputting specific performance examples and improvement criteria in the comments box if the employee was rated as 'Exceeding Expectations' or 'Not Meeting Expectations'
- Rated the employees in their unit consistently if the performance and/or conduct appraised was essentially the same or similar.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance Progress Notes Hello, Andy Log Out

### Bryan Business

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

Overview  
Plan  
Supervisor Evaluation  
Approvals & Acknowledgements  
History

My Reviews  
My Employees' Reviews

### Supervisor Evaluation for Bryan Business

The Next Level Supervisor's acknowledgment of the appraisal affirms approval of the overall performance rating.

**Return:** If changes are warranted to the Appraisal, clicking the Return button will send the Appraisal back to the immediate supervisor in Step 4.

**Approve:** If no changes are warranted, clicking the Approve button will forward the Supervisor Evaluation back to the Supervisor to schedule an Appraisal Review Meeting.

**Comment:** The comment field at the bottom of the page will allow you to provide feedback to the Supervisor on any changes you recommend.

### Individual Goals

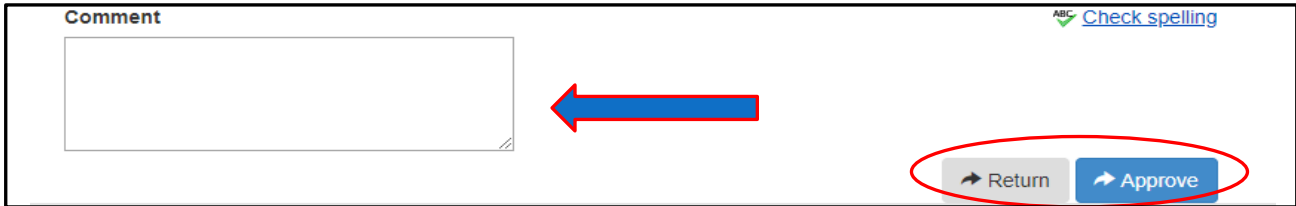
Provide ratings for the established 3 to 5 SMART (specific, measurable, attainable, relevant, and timed) Performance goals provided at the beginning of the performance cycle. Provide comments to support the ratings given. Check the appropriate rating (1-Not Meeting, 2-Meeting, or 3-Exceeding) based on the employee's progress.

Once completed click "Next" at the bottom of the page to move you to the Development Goals.

**Actions**  
Print  
Return  
Approve

2018-2019 EHRA Performance Appraisal  
Overall Status:  
Overall Rating: Meeting Expectations (2.0)  
Evaluation Type: Annual  
Program Timeframe: 04/12/18 to -  
Last Updated: June 27, 2018 15:46  
Last Completed Step: Supervisor Appraisal

Once your review of the appraisal has been completed, you may either approve or return the appraisal. Choosing the **'Approve'** action indicates your concurrence with the Ratings and Comments, as well as your assurance that all required information is completed and included. Choosing the **'Return'** option indicates modifications to, and/or additional information for the Supervisor Appraisal are required and the action is returned to the Supervisor's queue.

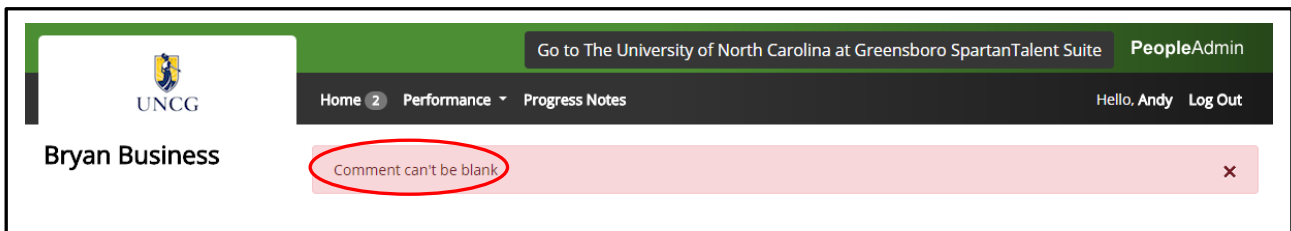


Comment ABC [Check spelling](#)

Return
Approve

Note: The Next-Level Supervisor should ensure that all required information- Comments, Performance Improvement etc. is completed prior to making the Supervisor Appraisal as **'Approved'**. If items are missing, please say what actions need to be completed in the comment box and choose the **'Return'** action.

If you do not enter comments in the box prior to clicking the **'Return'** you will see the following error message:



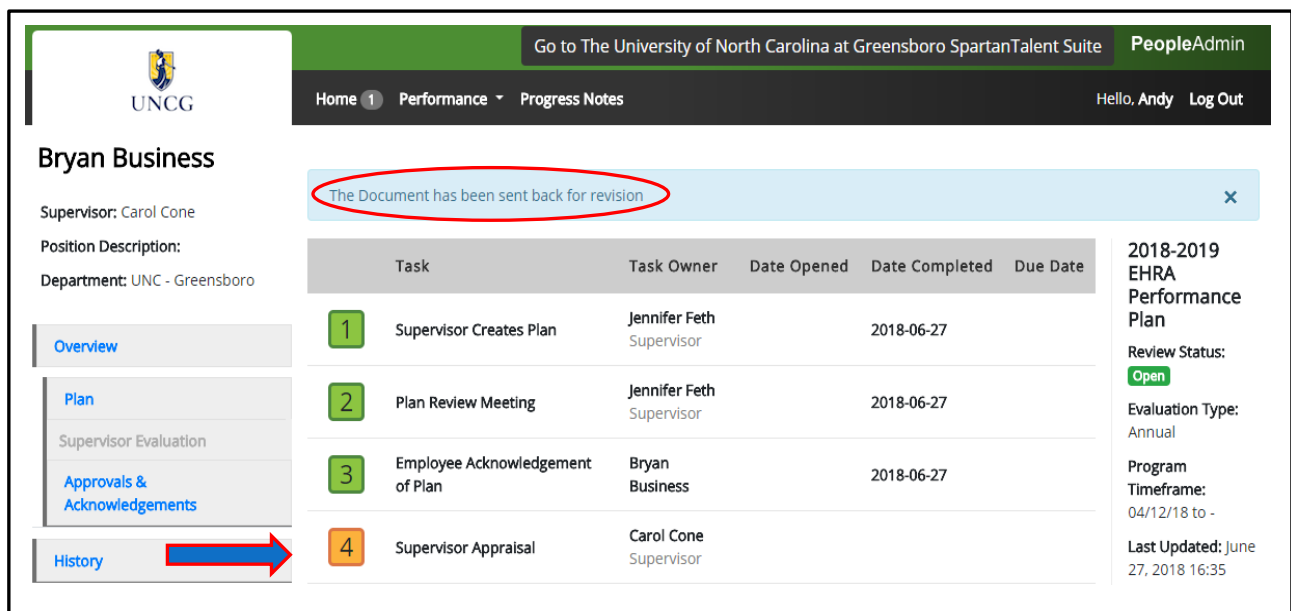
Go to The University of North Carolina at Greensboro SpartanTalent Suite PeopleAdmin

UNCG Home 2 Performance Progress Notes Hello, Andy Log Out

Bryan Business

Comment can't be blank ×

Once the **'Return'** action is completed correctly, you will see the screen below and it will read- **"The Document has been sent back for revision."** It is now back in the Supervisor's queue to make the necessary corrections. The step process for the employee will also revert to step 4.



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

UNCG Home 1 Performance Progress Notes Hello, Andy Log Out

Bryan Business

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

The Document has been sent back for revision ×

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

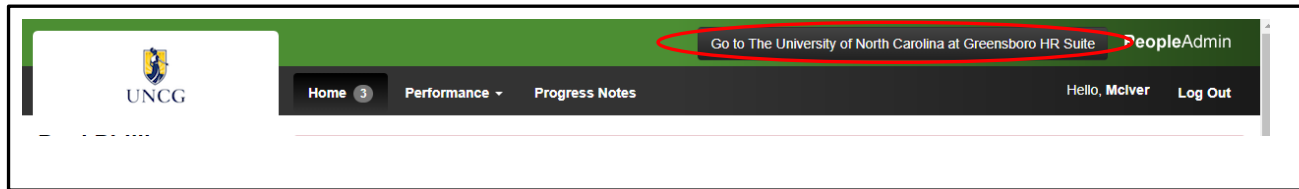
Review Status:  
Open

Evaluation Type:  
Annual

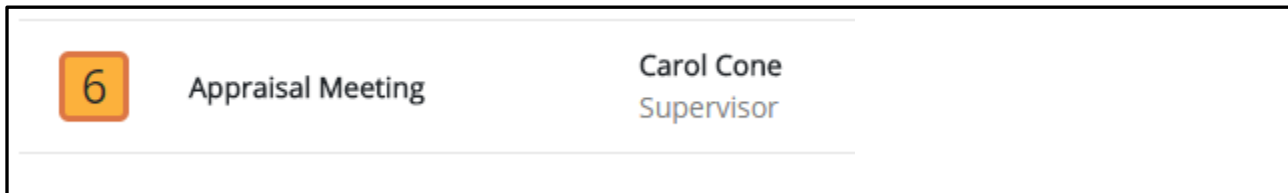
Program  
Timeframe:  
04/12/18 to -

Last Updated: June  
27, 2018 16:35

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.



## Supervisor/Employee Appraisal Discussion



Once the Next-Level Supervisor has completed his/her review of the Supervisor Rating and Comments, and marked this process step as **'Approved'**, this information will route immediately to the Supervisor. It is time to schedule/conduct a Supervisor/Employee Appraisal Meeting. During this meeting, you and your employee will discuss the ratings, comments, and improvement areas contained within the appraisal, as well as review the status of the Talent Development Plan goals established in the Plan. This discussion may be held concurrently with the Performance Plan Meeting for the next evaluation cycle.

To indicate that the Supervisor/Employee Appraisal Meeting took place, log into SpartanTalent ePerformance Management (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.

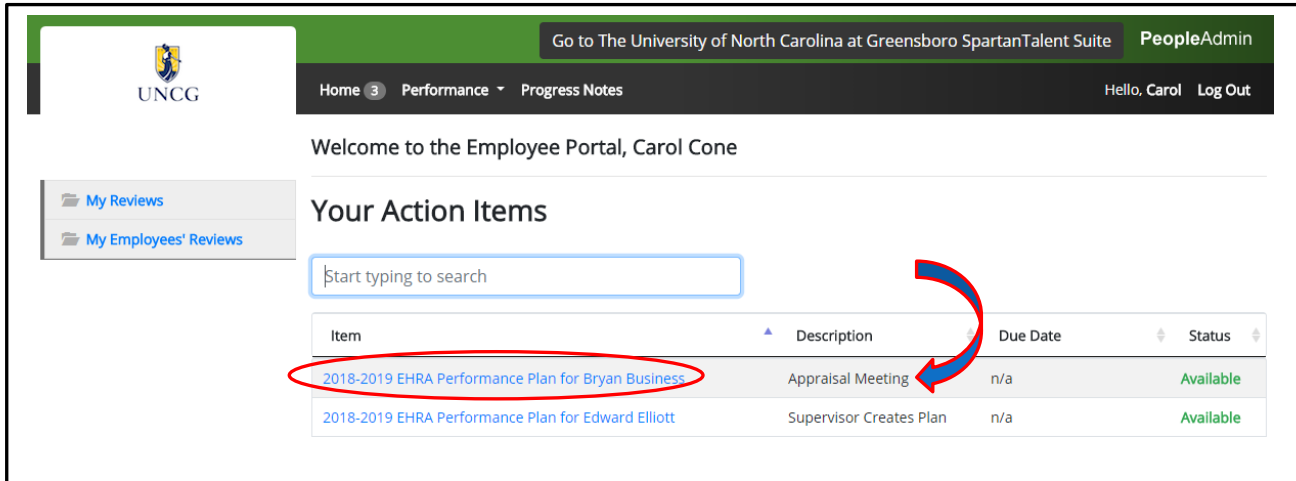


Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

**Note, you can access this link from any module and 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 indicate that the Supervisor/Employee Evaluation Discussion has been completed, select the description title that reads **'Appraisal Meeting'**.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home Performance Progress Notes Hello, Carol Log Out

Welcome to the Employee Portal, Carol Cone

**Your Action Items**

Start typing to search

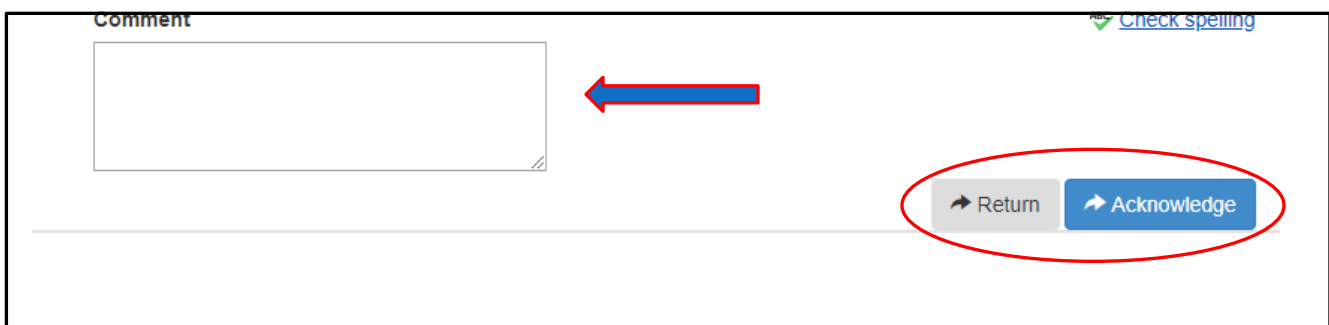
Item	Description	Due Date	Status
2018-2019 EHRA Performance Plan for Bryan Business	Appraisal Meeting	n/a	Available
2018-2019 EHRA Performance Plan for Edward Elliott	Supervisor Creates Plan	n/a	Available

Clicking the employee name next to **'Appraisal Meeting'** will bring up the Supervisor Evaluation. Use this opportunity to have a meaningful conversation with your employee. Recognize accomplishments and/or identify developmental needs.

The **'comment'** section on this page should be used to notate any significant highlights of the meeting that you wish to make a matter of record. Employees should not be asked to acknowledge an appraisal if the meeting has not occurred.

**Acknowledge:** You affirm that you have met with your employee. This will move the appraisal to the employee for acknowledgement.

**Return:** If during the Appraisal Meeting the Supervisor determines changes are warranted to the Appraisal, clicking the **'Return'** button will send the Appraisal back to the immediate supervisor in Step 7.

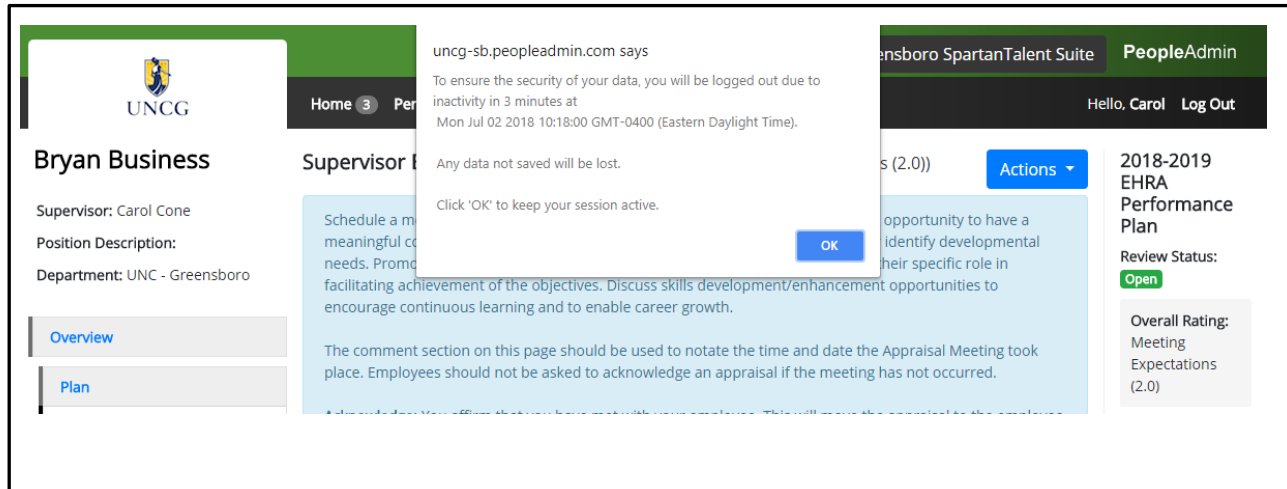


Comment Check Spelling

Return Acknowledge

Once you have clicked **'Acknowledge'** button the system will always ask you if you are sure you want to complete the action requested. Click **'OK'** only when you are sure you are finished with acknowledging

the Appraisal Meeting took place. If you complete the action before you had the Appraisal Meeting, the action can only be re-opened by a HR administrator.

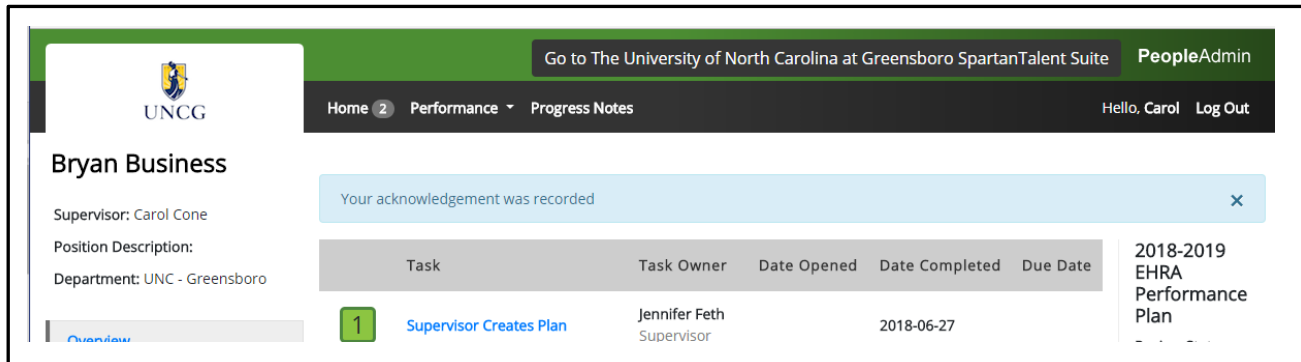


The screenshot shows the PeopleAdmin interface for a supervisor named Carol Cone. A modal dialog box is open with the following text:

uncg-sb.peopleadmin.com says  
To ensure the security of your data, you will be logged out due to inactivity in 3 minutes at Mon Jul 02 2018 10:18:00 GMT-0400 (Eastern Daylight Time).  
Any data not saved will be lost.  
Click 'OK' to keep your session active.

The dialog box has an 'OK' button. In the background, the interface shows the 'Supervisor' section for 'Bryan Business' and a '2018-2019 EHRA Performance Plan' with a status of 'Open' and an overall rating of 'Meeting Expectations (2.0)'.

After you have **'Acknowledged'** and clicked **'OK'** you will be sent back to the Employee Task Overview page and a prompt that shows your acknowledgement was recorded will appear. From this screen, you may review summary information associated with this employee's review.



The screenshot shows the PeopleAdmin interface after the appraisal meeting. A light blue notification bar at the top states: "Your acknowledgement was recorded". Below this, a table lists tasks:

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Jennifer Feth Supervisor		2018-06-27	

The interface also shows the 'Bryan Business' supervisor information and the '2018-2019 EHRA Performance Plan' with a status of 'Open'.

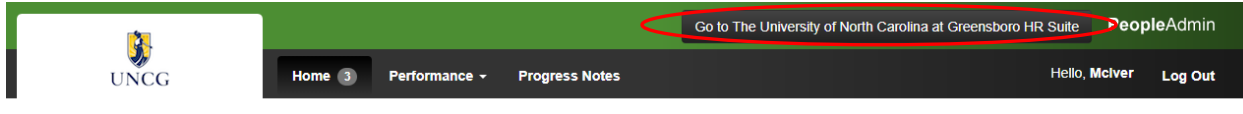
The last step in this appraisal process is the **'Employee Acknowledgement of Appraisal'**.

Congratulations!

You have Successfully Completed all required process steps associated with the Performance 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 your employee has acknowledged his/her performance plan, you may use the Progress Notes functionality to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching sessions. Progress notes are your personal records to assist with completion of the performance evaluation process and/or off-cycle reviews (performance check-ins). They are employee- specific and are not viewable to the employee unless you wish to share it with them. However, all documented items should be professional and performance-related.

**(Note:** Progress Notes are not intended to serve as a formal disciplinary action –They should only provide 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).

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.**

To locate a specific employee, click the ‘My Employee Reviews’ link on the left navigation or by using the ‘Performance’ dropdown.

Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance Progress Notes Hello, Carol Log Out

UNCG

**Bryan Business**

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

Overview

Plan  
Supervisor Evaluation  
Approvals & Acknowledgements

History

My Reviews  
**My Employees' Reviews**

Your acknowledgment

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	Jennifer Feth Supervisor		2018-07-02	
5 Next Level Supervisor Approves Appraisal	Jennifer Feth Reviewing Officer		2018-07-02	
6 Appraisal Meeting	Jennifer Feth Supervisor		2018-07-02	
7 Employee Acknowledgment of Appraisal	Bryan Business			

2018-2019 EHRA Performance Plan

Review Status: **Open**

Overall Rating: Meeting Expectations (2.0)

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: July 02, 2018 10:23

Last Completed Step: Appraisal Meeting

Co-reviewer: N/A

The following screen will appear for you to locate the specific employee of interest and the associated program you would like to view. Click the employee's name to access the program.

UNCG Home 2 Performance Progress Notes Hello, Carol Log Out

Reviews Dashboard

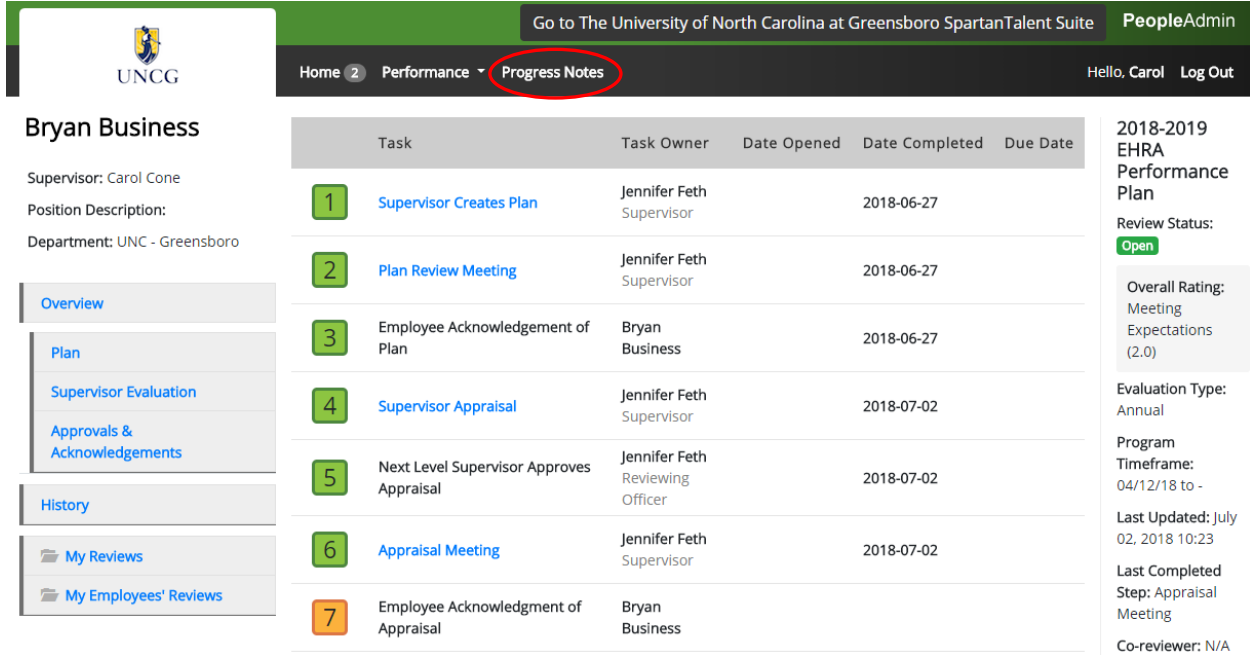
My Reviews  
My Employees' Reviews

Reset Program  Employee Name  Group by:  Advanced

All Reviews 3 Not Started 0 In Process 3 Complete 0 Overdue 0 Disputed 0

Last name	First Name	Anniversary Date	Progress	Program	Score
2018-2019 EHRA Performance Plan 2					
Business	Bryan	2013-05-01	6/7	2018-2019 EHRA Performance Plan	Performance Meeting Expectations (2.0)

Once selected, the following screen will appear. You may choose Progress Notes from the top drop-down bar.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance ▾ **Progress Notes** Hello, Carol Log Out

**Bryan Business**

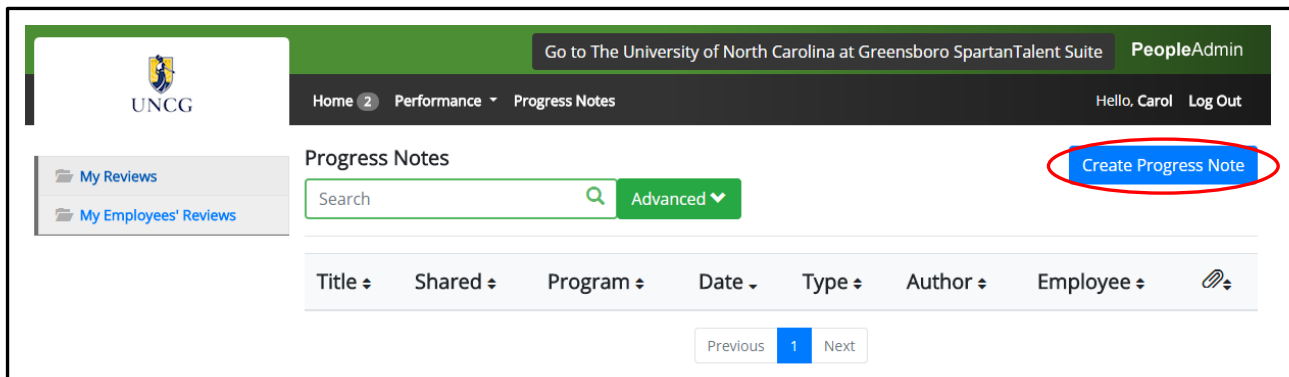
Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

Overview  
Plan  
Supervisor Evaluation  
Approvals & Acknowledgements  
History  
My Reviews  
My Employees' Reviews

Task	Task Owner	Date Opened	Date Completed	Due Date
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3 Employee Acknowledgement of Plan	Bryan Business		2018-06-27	
4 Supervisor Appraisal	Jennifer Feth Supervisor		2018-07-02	
5 Next Level Supervisor Approves Appraisal	Jennifer Feth Reviewing Officer		2018-07-02	
6 Appraisal Meeting	Jennifer Feth Supervisor		2018-07-02	
7 Employee Acknowledgment of Appraisal	Bryan Business			

2018-2019 EHRA Performance Plan  
Review Status: **Open**  
Overall Rating: Meeting Expectations (2.0)  
Evaluation Type: Annual  
Program Timeframe: 04/12/18 to -  
Last Updated: July 02, 2018 10:23  
Last Completed Step: Appraisal Meeting  
Co-reviewer: N/A

Once selected, the following screen will appear. Choose the blue box labeled **'Create Progress Note'** to bring up the 'New Progress Note' box.




Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance ▾ Progress Notes Hello, Carol Log Out

**Progress Notes** [Create Progress Note](#)

Search   ▾

Title ▾ Shared ▾ Program ▾ Date ▾ Type ▾ Author ▾ Employee ▾ 

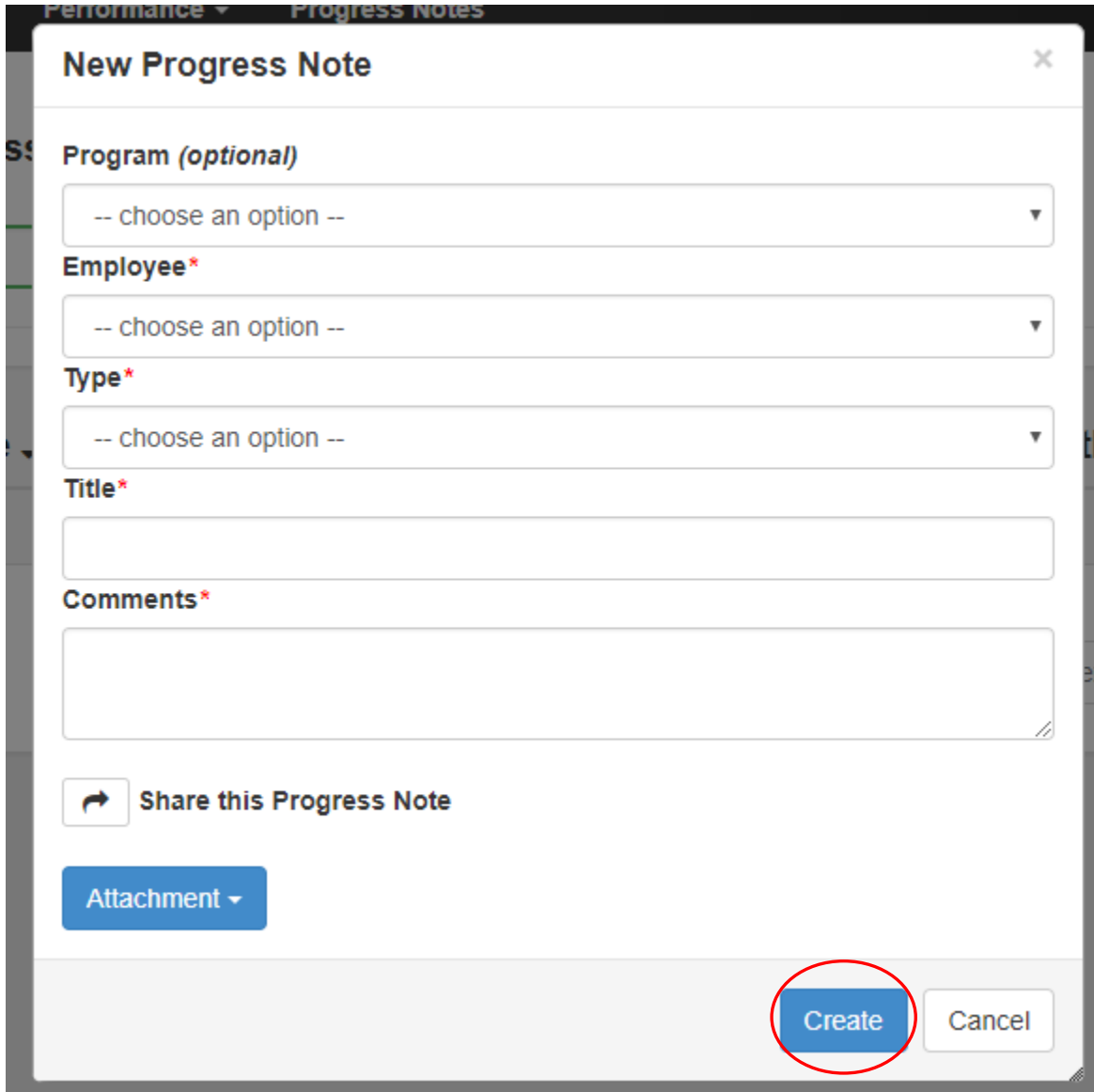
Previous 1 Next

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'**, only one employee can be chosen at a time, so if you are entering progress notes for an entire team, they will be done individually. **'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 your employee to see what you have entered for them. If you choose not to share the Progress Note, it will remain invisible to the employee and will be available 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 – They only serve as 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).



**New Progress Note** [X]

**Program (optional)**  
-- choose an option --

**Employee\***  
-- choose an option --

**Type\***  
-- choose an option --

**Title\***  
[Text Input Field]

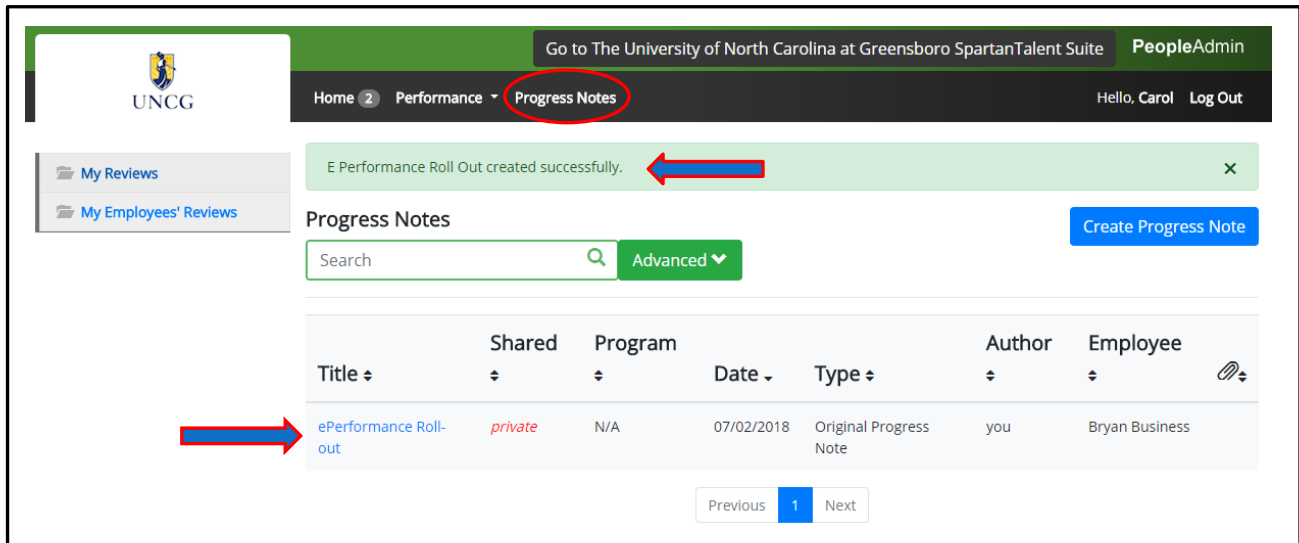
**Comments\***  
[Text Area]

[Share Icon] **Share this Progress Note**

**Attachment** ▾

**Create** **Cancel**


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 employee.





Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**


Home 2 Performance **Progress Notes** Hello, Carol Log Out

My Reviews  
My Employees' Reviews

E Performance Roll Out created successfully. 

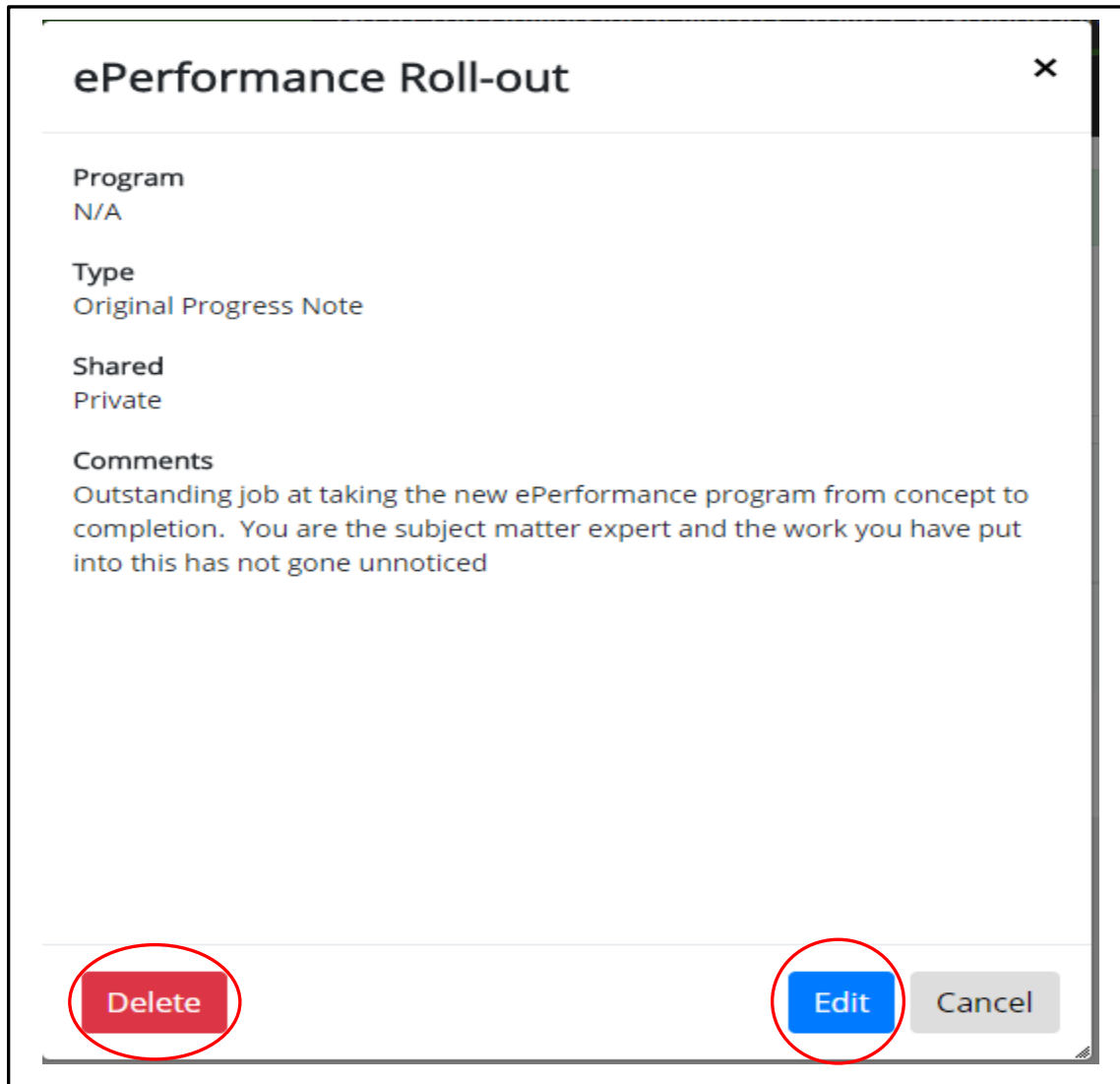
Progress Notes [Create Progress Note](#)

Search  **Advanced** 

Title	Shared	Program	Date	Type	Author	Employee
 ePerformance Roll-out	private	N/A	07/02/2018	Original Progress Note	you	Bryan Business

Previous **1** Next

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.



## ePerformance Roll-out

**Program**  
N/A

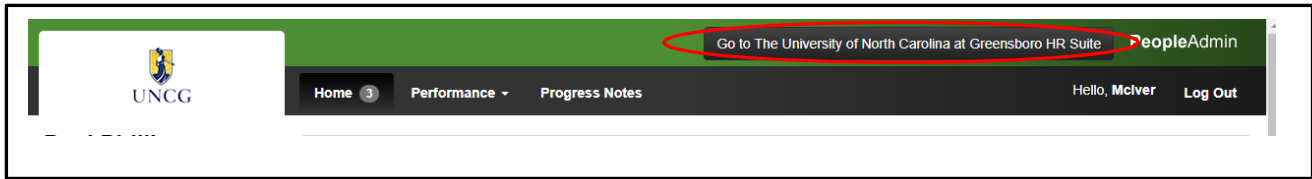
**Type**  
Original Progress Note

**Shared**  
Private

**Comments**  
Outstanding job at taking the new ePerformance program from concept to completion. You are the subject matter expert and the work you have put into this has not gone unnoticed

**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.



## **Revise Employee Appraisal**

If you need to update or correct information in your employee's annual appraisal, but it has already been approved by the Next-Level Supervisor, contact Jennifer Feth at [jmfeth@uncg.edu](mailto:jmfeth@uncg.edu) or Ext. 44508. You may also call the Human Resource office directly at 336-334-5009. You will need to request that the action item be put back in your queue for revision. You will see **'Supervisor Appraisal'** appear back in your **'Action Items'** when you enter the employee portal.

Once the item has been put back in your queue, use the **'Supervisor Appraisal'** process steps to revise and complete the employee appraisal.

Once you finish revising the appraisal, your changes will go back to the Next-Level Supervisor for approval, then back to you to meet with your employee about the changes made, and last to the employee to **'Acknowledge'** the changes.

## **Optional Co-Reviewer**

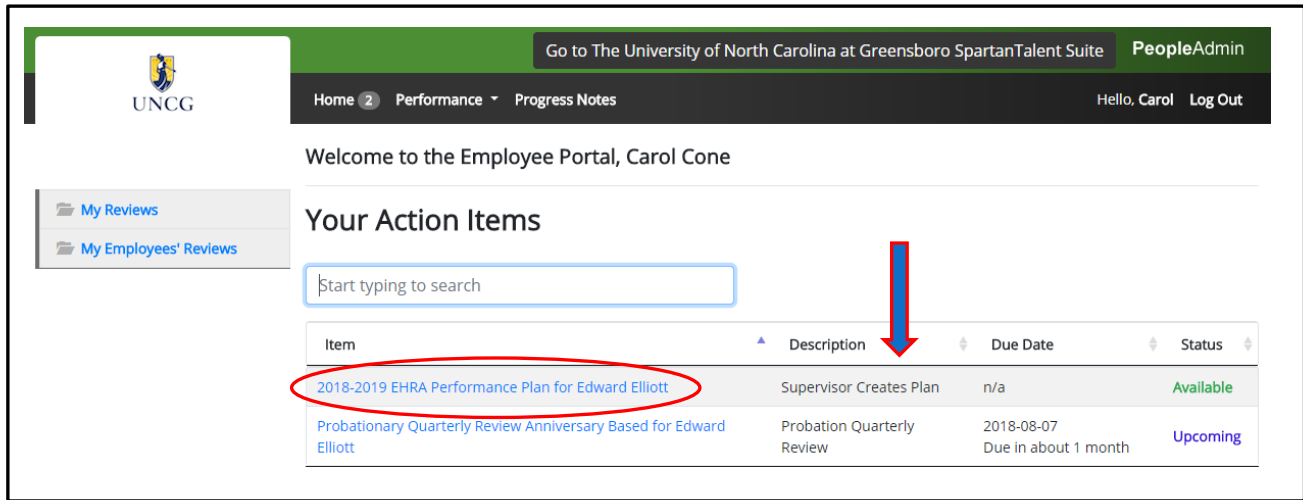
There is an optional feature in the ePerformance program to add additional reviewers to evaluate your employee(s). The **'Co-Reviewer'** will be able to access everything from the first step in the appraisal process, **'Supervisor Creates Plan'** to the last supervisor step of the **'Appraisal Meeting'**. The **'Co-Reviewer'** can access and modify the same Supervisor Appraisal that the Supervisor fills out and can also complete it. If a Co-Reviewer **'Completes'** the evaluation, the Supervisor will be able to view it but not edit it unless the Next-Level Supervisor rejects the appraisal; then the Supervisor will once again be able to edit it.

The combined entries/edits of the Supervisor and Co-Reviewer are the evaluation the employee will see once it has been completed, received final approval on, and released for viewing. This option may be desirable if an employee has changed reporting part way through the year or the employee is a shared resource between two supervisors.

The Co-Reviewer will receive notification that they are a Co-Reviewer for this employee and **'actionable'** tasks will show up in the Co-Reviewers **'Action Items'**. You should speak with this person to explain your intentions about their role as a Co-Reviewer. Different circumstances for each employee may be slightly varied and the parts a supervisor would like the Co-Review to evaluate may be focused only on a portion of the appraisal. **If you are selected as a Co-Reviewer for another employee, make sure you understand what the supervisor expects.**

To assign a Co-Reviewer, bring up the employee you would like to have a Co-Reviewer assigned to in **'Your Action Items'**. As Co-Reviewers are assigned in Step 1 of the appraisal process, select **'Supervisor**

**Creates Plan’.**



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance Progress Notes Hello, Carol Log Out

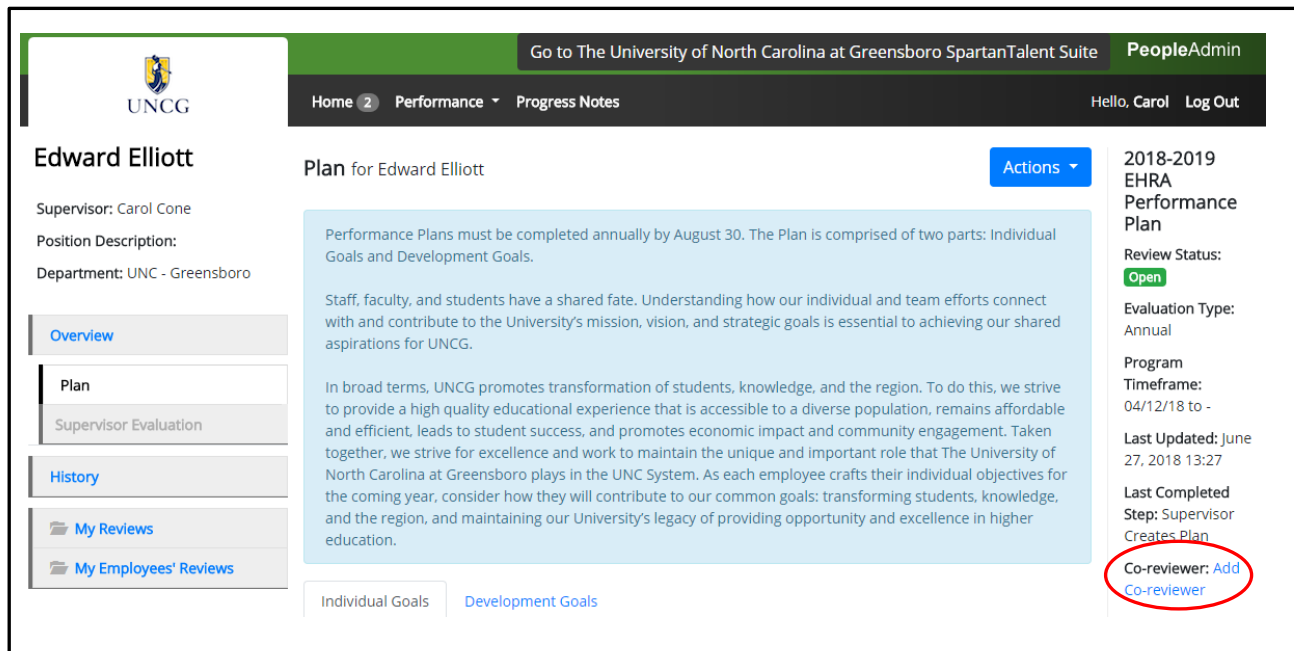
Welcome to the Employee Portal, Carol Cone

**Your Action Items**

Start typing to search

Item	Description	Due Date	Status
2018-2019 EHRA Performance Plan for Edward Elliott	Supervisor Creates Plan	n/a	Available
Probationary Quarterly Review Anniversary Based for Edward Elliott	Probation Quarterly Review	2018-08-07 Due in about 1 month	Upcoming

Once in the Plan creation process of the appraisal, you will see on the right- hand side of the screen the option to ‘Add Co-Reviewer’. Hover over the blue ‘Add Co-Reviewer’ and select.



Go to The University of North Carolina at Greensboro SpartanTalent Suite **PeopleAdmin**

Home 2 Performance Progress Notes Hello, Carol Log Out

**Edward Elliott**

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

**Plan for Edward Elliott** **Actions**

Performance Plans must be completed annually by August 30. The Plan is comprised of two parts: Individual Goals and Development Goals.

Staff, faculty, and students have a shared fate. Understanding how our individual and team efforts connect with and contribute to the University's mission, vision, and strategic goals is essential to achieving our shared aspirations for UNCG.

In broad terms, UNCG promotes transformation of students, knowledge, and the region. To do this, we strive to provide a high quality educational experience that is accessible to a diverse population, remains affordable and efficient, leads to student success, and promotes economic impact and community engagement. Taken together, we strive for excellence and work to maintain the unique and important role that The University of North Carolina at Greensboro plays in the UNC System. As each employee crafts their individual objectives for the coming year, consider how they will contribute to our common goals: transforming students, knowledge, and the region, and maintaining our University's legacy of providing opportunity and excellence in higher education.

Individual Goals Development Goals

**2018-2019 EHRA Performance Plan**

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: June 27, 2018 13:27

Last Completed Step: Supervisor Creates Plan

Co-reviewer: Add Co-reviewer

Once selected it will bring up a new window that will allow you to search available users, when you have searched and located the name you are looking for, check the box to select and click save.


## Select Co-reviewer

Begin typing a name or login to search available users. Then select a user from the list.

<input type="checkbox"/>	Name	Login	Department	Supervisor
<input checked="" type="radio"/>	Sam Spartan	null	UNC - Greensboro	Mary Minerva

Cancel Save

Once you have selected your Co-Reviewer for your employee, your screen will now show who is available to edit the appraisal process on the right of the plan screen. The Co-Reviewer can be removed at any time by the immediate supervisor for the employee by using the 'trashcan' icon beside the Co-Reviewers name.



[Go to The University of North Carolina at Greensboro SpartanTalent Suite](#)
PeopleAdmin

Home **2** Performance ▾ Progress Notes
Hello, Carol [Log Out](#)

### Edward Elliott

Supervisor: Carol Cone  
Position Description:  
Department: UNC - Greensboro

- Overview
- Plan
- Supervisor Evaluation
- History
- My Reviews
- My Employees' Reviews

### Plan for Edward Elliott

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Individual Goals
Development Goals

2018-2019  
EHRA  
Performance  
Plan

Review Status:  
Open

Evaluation Type:  
Annual

Program  
Timeframe:  
04/12/18 to -

Last Updated: June  
27, 2018 13:27

Last Completed  
Step: Supervisor  
Creates Plan

Co-reviewer: Sam  
Spartan

↑



This concludes the training for EHRA Supervisors 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\\_7WlupIFY03m69w1](https://uncg.qualtrics.com/jfe/form/SV_7WlupIFY03m69w1)