

SHRA E-PERFORMANCE Employee User Guide

Stay on target with

ePerformance



**UNC
GREENSBORO**
Human Resources

UNCG



Jennifer Marlene Feth

Version 1.1 19JUL18

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Navigating the SpartanTalent e-Performance Module

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

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

Logging in and Accessing the Employee Portal

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



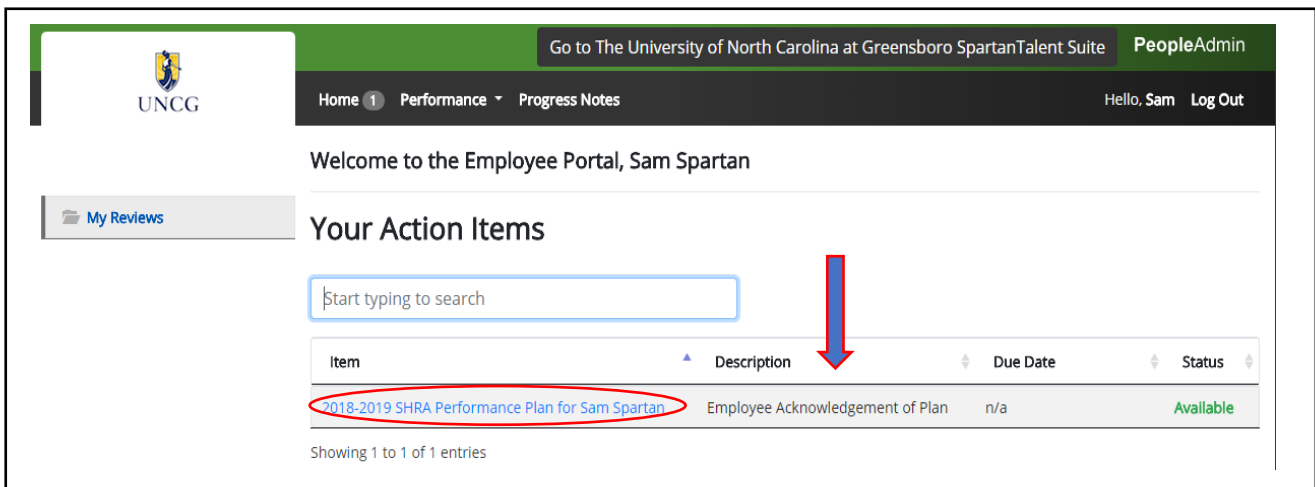
Once logged in, click the ‘ePerformance’ link in the upper left-hand corner of your page.

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.

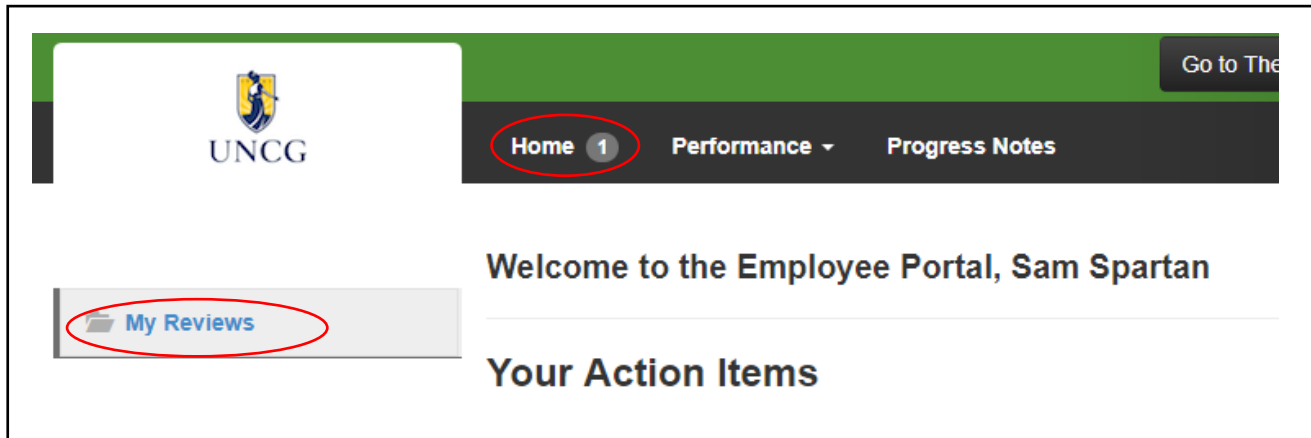
‘Item’ indicates the review type (Annual, Off-Cycle Review, etc.) ‘Description’ indicates the current process step and/or required action.



If you need to get back to **'Your Action Items'** page, click the **'Home'** button at the top of your screen.

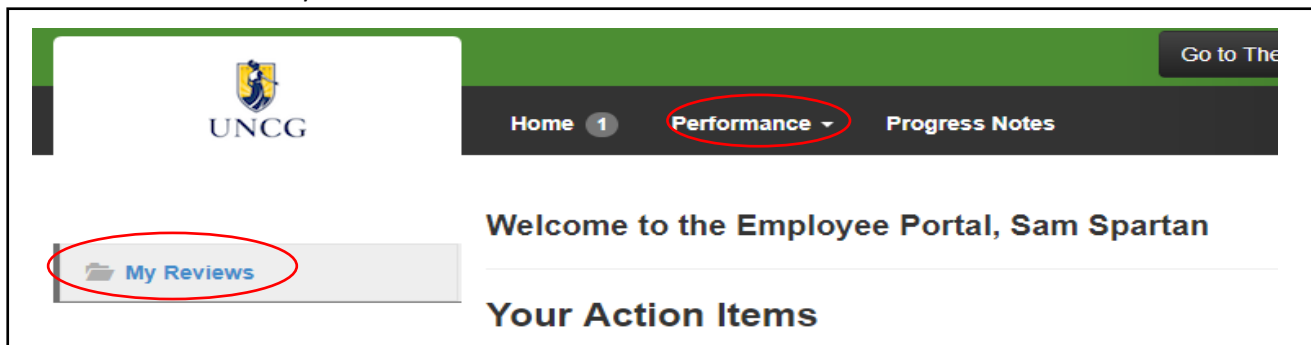
Once you have completed the actions in **'Your Actions Items'** they will no longer appear on this screen unless it is re-opened by a Human Resources administrator.

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'



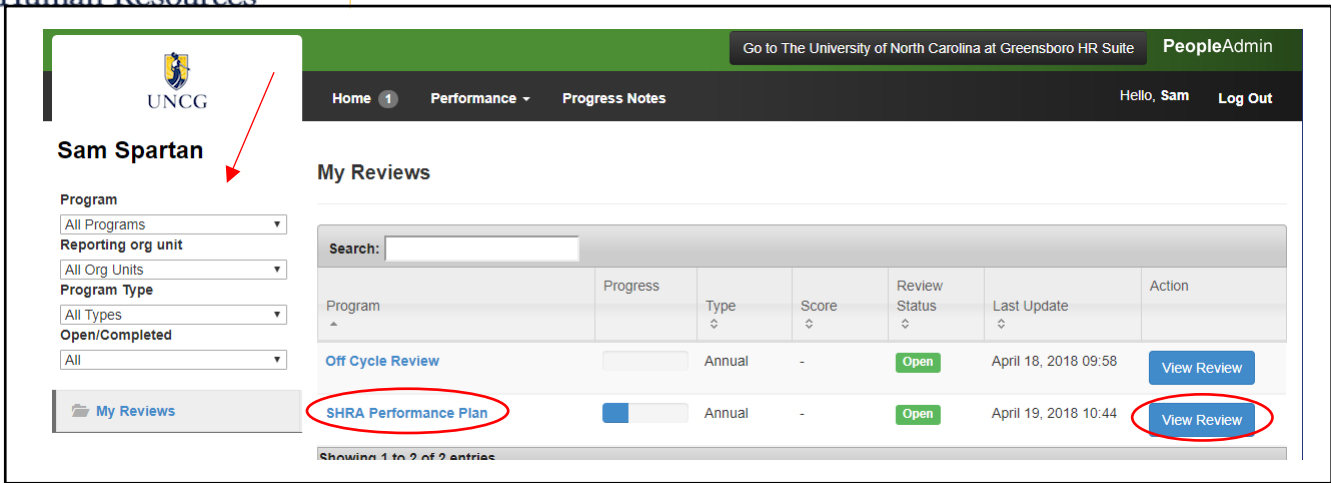
Searching and Dashboard

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.



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

Home 1 Performance ▾ Progress Notes Hello, Sam Log Out

Sam Spartan

Program
 All Programs ▾
 Reporting org unit
 All Org Units ▾
 Program Type
 All Types ▾
 Open/Completed
 All ▾

My Reviews

My Reviews

Search:

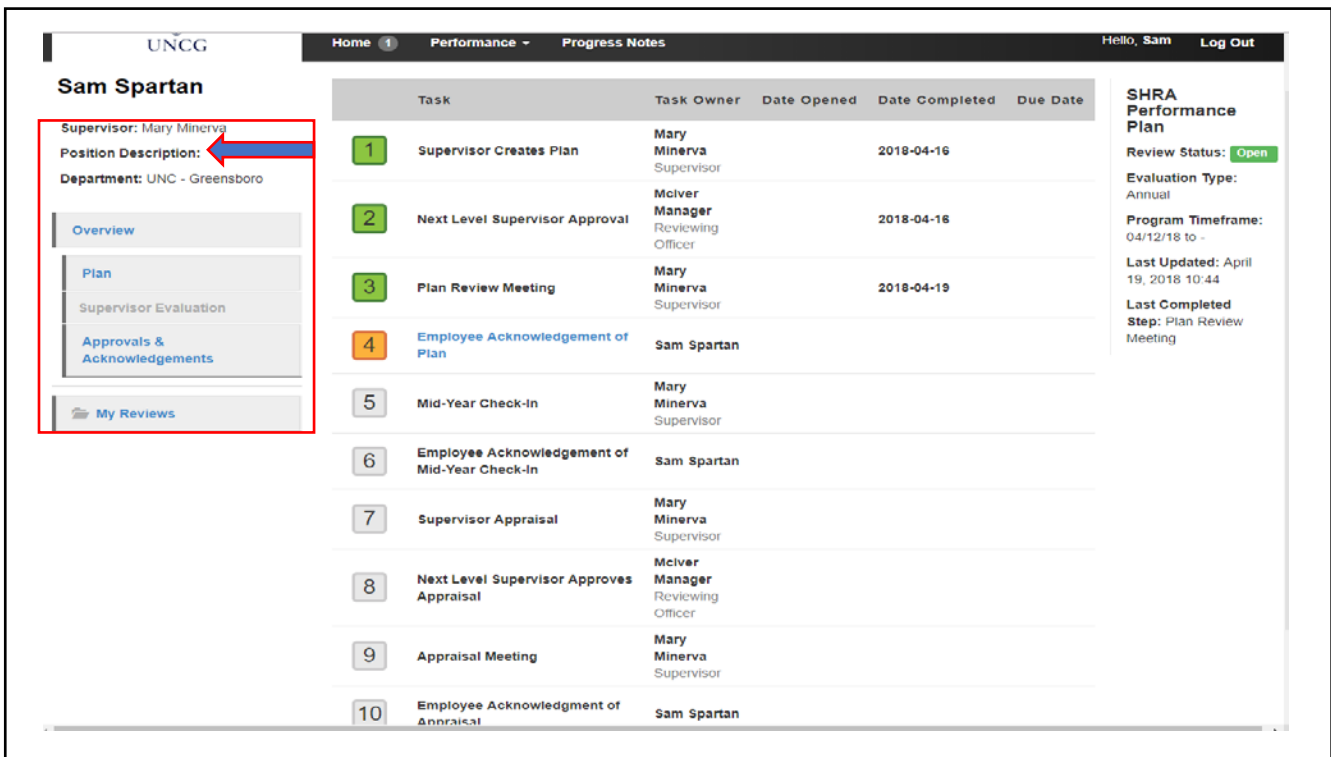
Program	Progress	Type	Score	Review Status	Last Update	Action
Off Cycle Review	<input type="checkbox"/>	Annual	-	Open	April 18, 2018 09:58	View Review
SHRA Performance Plan	<input checked="" type="checkbox"/>	Annual	-	Open	April 19, 2018 10:44	View Review

Showing 1 to 2 of 2 entries

The **'Overview'** screen will show you all the performance tasks that will or have occurred in this cycle. It also lists the task owner, the date the task opened, the date the owner completed the task, and the due date of each task. The tasks for which you are the owner are in **blue**.

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

You can also find your current job description by clicking the job title, under the name, in the top left corner of the screen. (See arrow)



UNC Greensboro

Home 1 Performance ▾ Progress Notes Hello, Sam Log Out

Sam Spartan

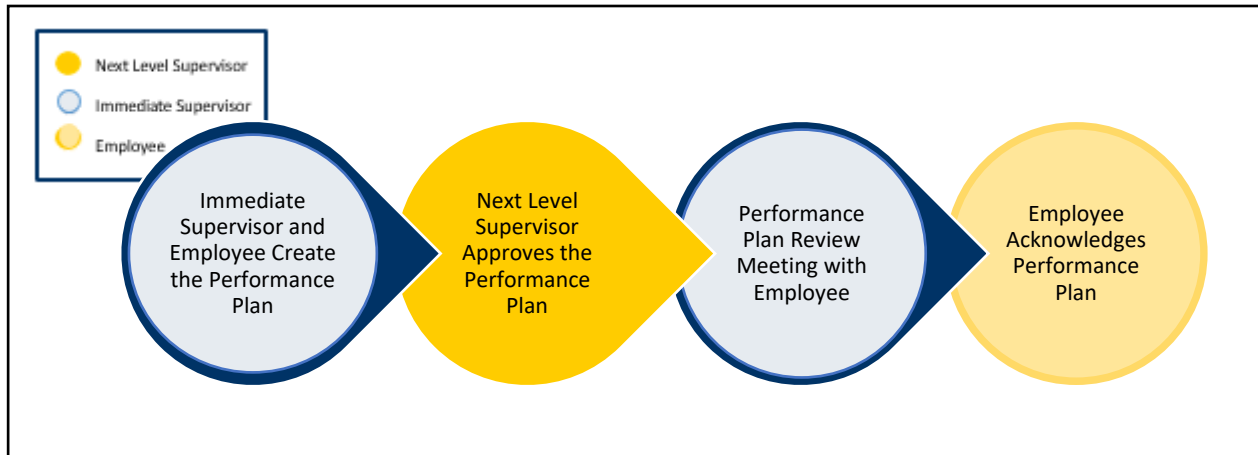
Supervisor: Mary Minerva
 Position Description: [Position Description](#)
 Department: UNC - Greensboro

Overview
 Plan
 Supervisor Evaluation
 Approvals & Acknowledgements
 My Reviews

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Mary Minerva Supervisor		2018-04-16	
2 Next Level Supervisor Approval	McIver Manager Reviewing Officer		2018-04-16	
3 Plan Review Meeting	Mary Minerva Supervisor		2018-04-19	
4 Employee Acknowledgement of Plan	Sam Spartan			
5 Mid-Year Check-In	Mary Minerva Supervisor			
6 Employee Acknowledgement of Mid-Year Check-In	Sam Spartan			
7 Supervisor Appraisal	Mary Minerva Supervisor			
8 Next Level Supervisor Approves Appraisal	McIver Manager Reviewing Officer			
9 Appraisal Meeting	Mary Minerva Supervisor			
10 Employee Acknowledgment of Appraisal	Sam Spartan			

SHRA Performance Plan
 Review Status: **Open**
 Evaluation Type: Annual
 Program Timeframe: 04/12/18 to -
 Last Updated: April 19, 2018 10:44
 Last Completed Step: Plan Review Meeting

Performance Plan Process Steps



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

Employee Acknowledgement of Plan

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

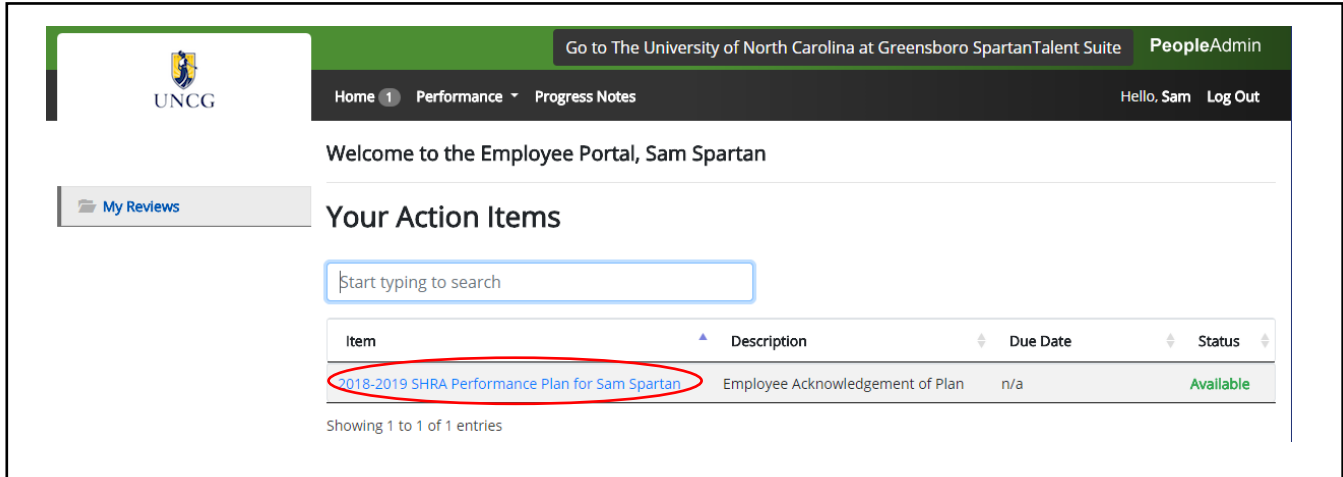


Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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'.



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

Home 1 Performance Progress Notes Hello, Sam Log Out

Welcome to the Employee Portal, Sam Spartan

My Reviews

Your Action Items

Start typing to search

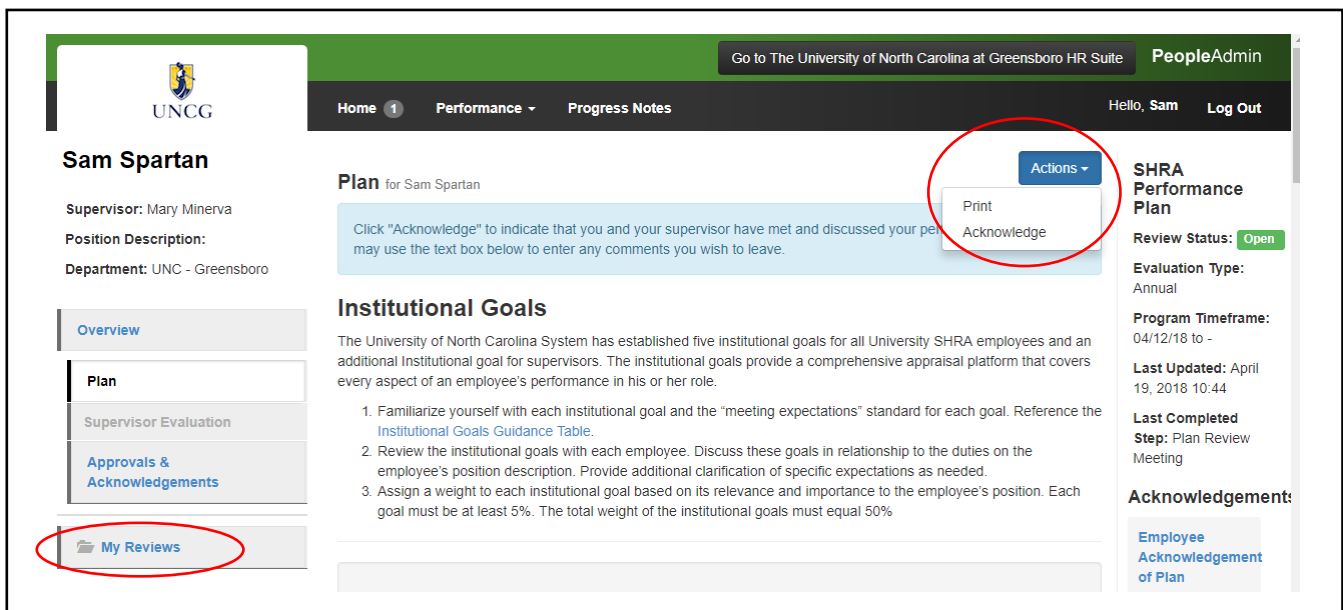
Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Sam Spartan	Employee Acknowledgement of Plan	n/a	Available

Showing 1 to 1 of 1 entries

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.



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

Home 1 Performance Progress Notes Hello, Sam Log Out

Sam Spartan

Supervisor: Mary Minerva
Position Description:
Department: UNC - Greensboro

Overview

Plan

Supervisor Evaluation

Approvals & Acknowledgements

My Reviews

Plan for Sam Spartan

Click "Acknowledge" to indicate that you and your supervisor have met and discussed your performance. You may use the text box below to enter any comments you wish to leave.

Actions

- Print
- Acknowledge

SHRA Performance Plan

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: April 19, 2018 10:44

Last Completed Step: Plan Review Meeting

Institutional Goals

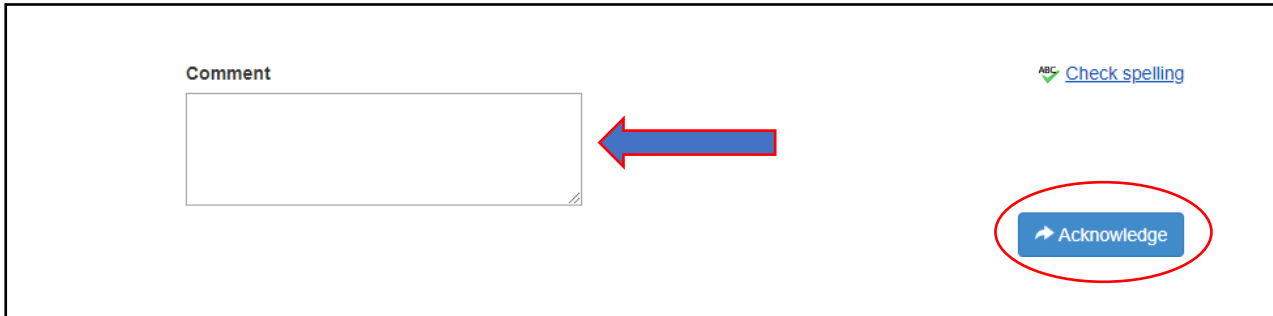
The University of North Carolina System has established five institutional goals for all University SHRA employees and an additional Institutional goal for supervisors. The institutional goals provide a comprehensive appraisal platform that covers every aspect of an employee's performance in his or her role.

1. Familiarize yourself with each institutional goal and the "meeting expectations" standard for each goal. Reference the Institutional Goals Guidance Table.
2. Review the institutional goals with each employee. Discuss these goals in relationship to the duties on the employee's position description. Provide additional clarification of specific expectations as needed.
3. Assign a weight to each institutional goal based on its relevance and importance to the employee's position. Each goal must be at least 5%. The total weight of the institutional goals must equal 50%

Acknowledgement: Employee Acknowledgement of Plan

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.

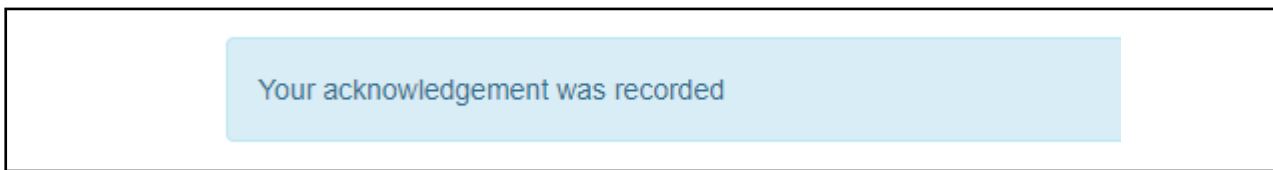


Comment

ABC [Check spelling](#)

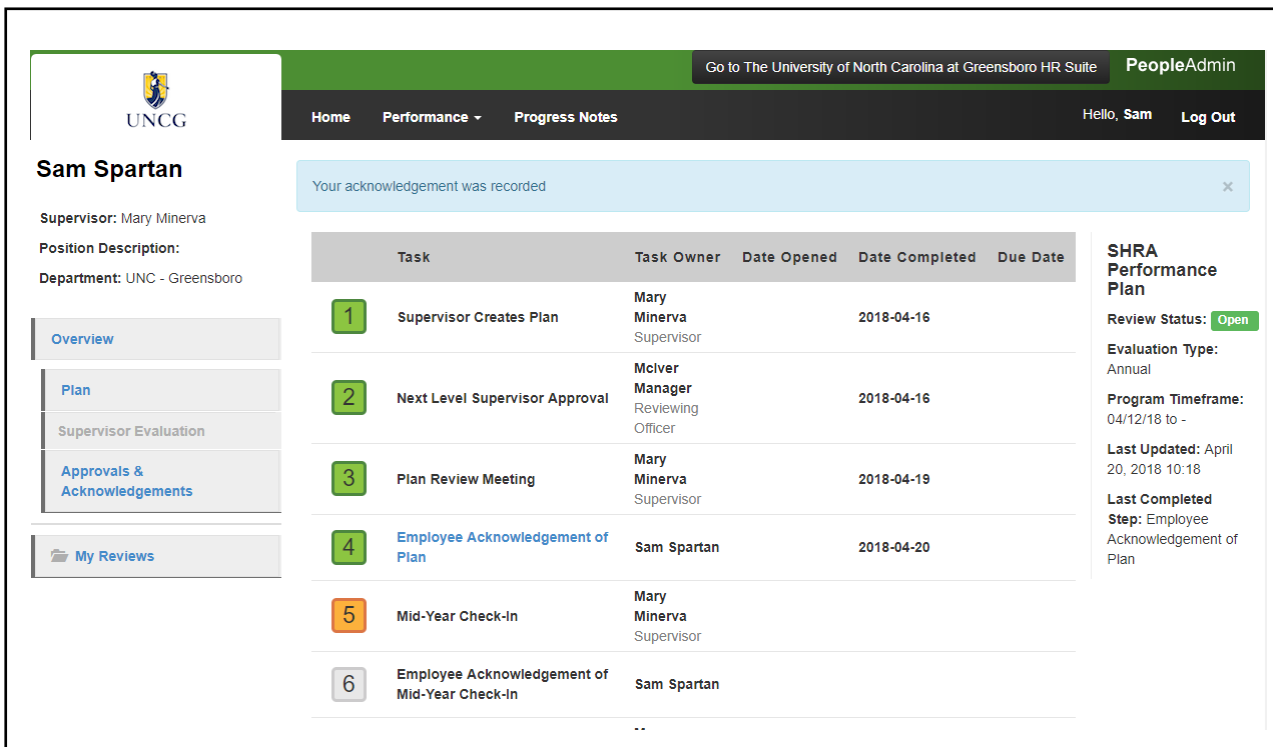
[Acknowledge](#)

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.



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

Home Performance Progress Notes Hello, Sam Log Out

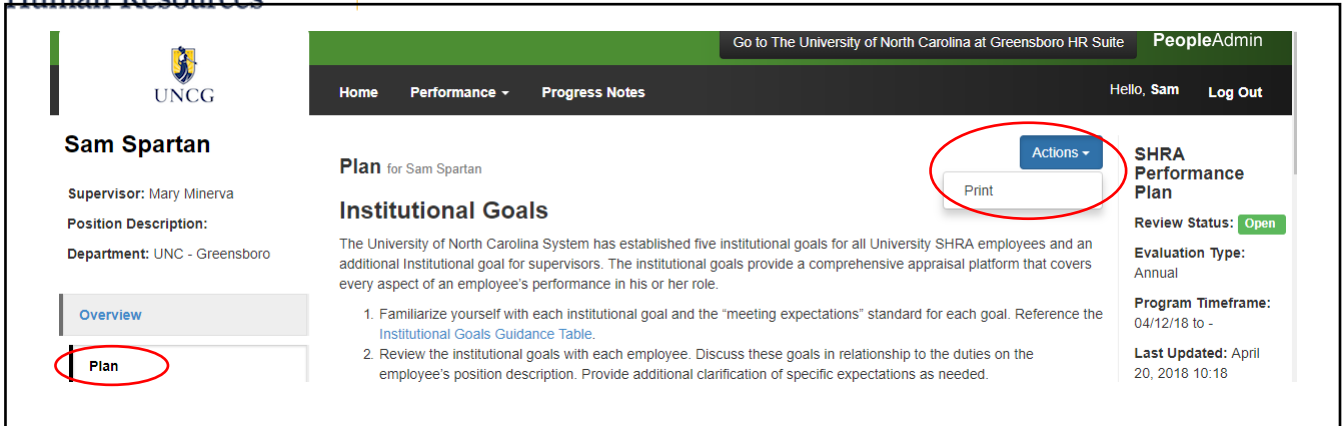
Sam Spartan
Supervisor: Mary Minerva
Position Description:
Department: UNC - Greensboro

Your acknowledgement was recorded

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Mary Minerva Supervisor		2018-04-16	
2 Next Level Supervisor Approval	Mclver Manager Reviewing Officer		2018-04-16	
3 Plan Review Meeting	Mary Minerva Supervisor		2018-04-19	
4 Employee Acknowledgement of Plan	Sam Spartan		2018-04-20	
5 Mid-Year Check-in	Mary Minerva Supervisor			
6 Employee Acknowledgement of Mid-Year Check-in	Sam Spartan			

SHRA Performance Plan
Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 04/12/18 to -
Last Updated: April 20, 2018 10:18
Last Completed Step: Employee Acknowledgement of Plan

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.



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

Home Performance Progress Notes Hello, Sam Log Out

Sam Spartan

Supervisor: Mary Minerva
Position Description:
Department: UNC - Greensboro

Overview

Plan

Plan for Sam Spartan

Institutional Goals

The University of North Carolina System has established five institutional goals for all University SHRA employees and an additional Institutional goal for supervisors. The institutional goals provide a comprehensive appraisal platform that covers every aspect of an employee's performance in his or her role.

1. Familiarize yourself with each institutional goal and the "meeting expectations" standard for each goal. Reference the [Institutional Goals Guidance Table](#).
2. Review the institutional goals with each employee. Discuss these goals in relationship to the duties on the employee's position description. Provide additional clarification of specific expectations as needed.

SHRA Performance Plan

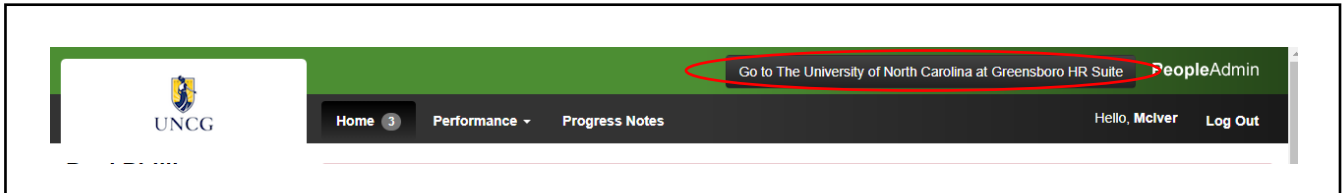
Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: April 20, 2018 10:18

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 Performance Progress Notes Hello, McIver Log Out

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



..UNCGjobsearch Log In..

THE UNIVERSITY of NORTH CAROLINA
GREENSBORO

UNCG User Login Only
Click here to login with your UNCG username and password.

Reset or Update an account

Applicant Login Only
Click here to login to the applicant portal and review available employment opportunities.

UNCG Authentication

UNCGjobsearch Secure Login

Username:

Password:

Sign In

If you are having problems logging in or need to change your password, visit reset.uncg.edu.

Hire

Hire

Positions

OTHER TOOLS

ePerformance

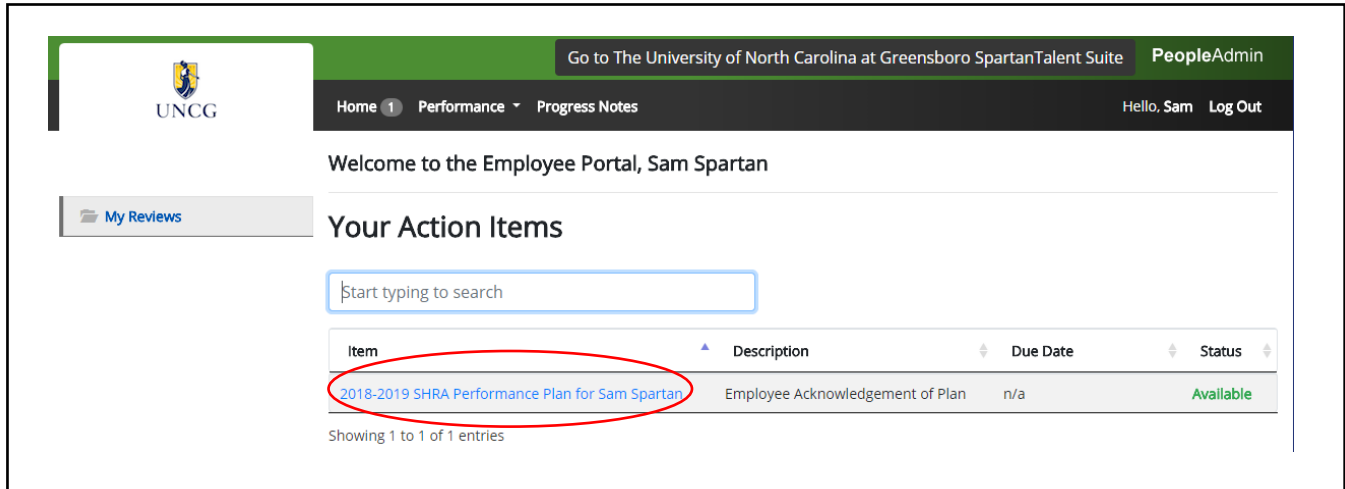
Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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

Once your Supervisor has 'Approved' the Mid-Year Check-In for you, you will see **'Employee Acknowledgement of Mid-Year Check-In'** in **'Your Action Items'**. This indicates that it is time to

acknowledge that you and your supervisor had a Mid-Year meeting. During this meeting you and your employee will discuss the expectations contained within the Performance Plan, as well as the method(s) of evaluation you intend to use to conduct your assessment of work performance.

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



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

Home 1 Performance Progress Notes Hello, Sam Log Out

Welcome to the Employee Portal, Sam Spartan

[My Reviews](#)

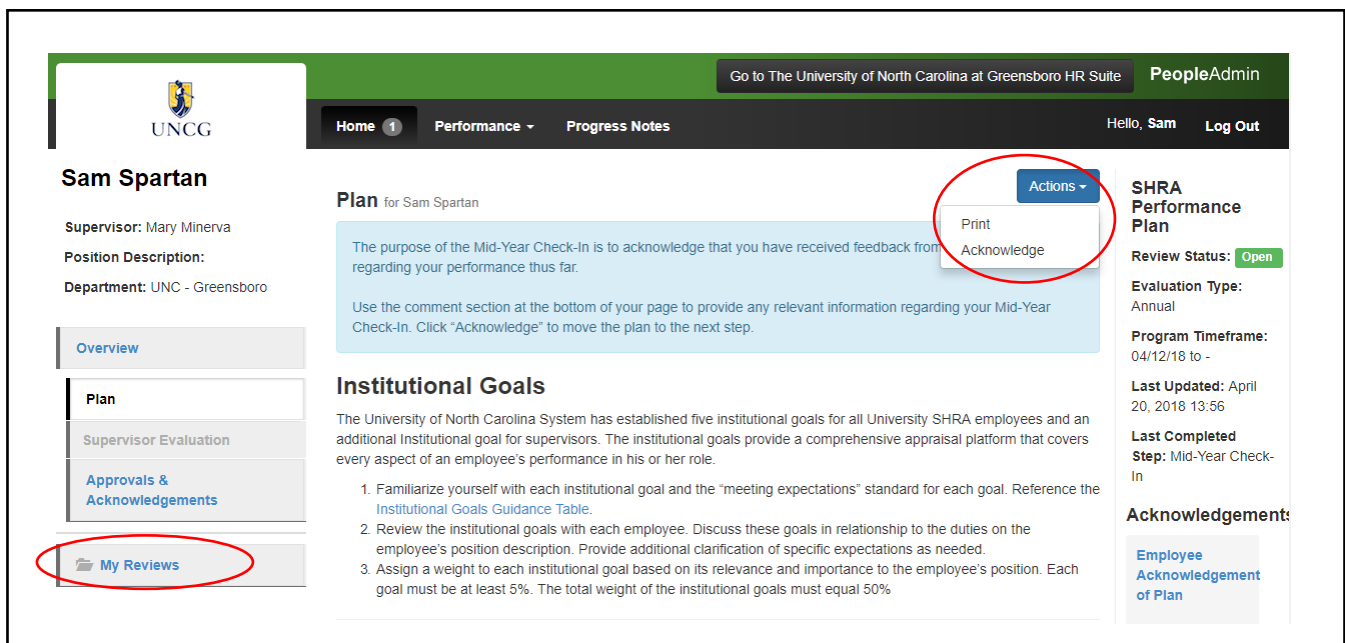
Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Sam Spartan	Employee Acknowledgement of Plan	n/a	Available

Showing 1 to 1 of 1 entries

Once you open your Mid-Year Check-In, if no revisions have been made, and you have had your meeting with your supervisor, you will have the opportunity to **'Print'** or **'Acknowledge'** the Mid-Year Check-In. Note: There is no need to print your Plan as it will always be available for viewing in the **'My Reviews'** folder. However, if you wish to have a hard copy you can find the option under your blue **'Actions'** button. After you have acknowledged the Mid-Year Check-In, the next task in the appraisal process will go to your immediate supervisor.



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

Home 1 Performance Progress Notes Hello, Sam Log Out

Sam Spartan

Supervisor: Mary Minerva
Position Description:
Department: UNC - Greensboro

- Overview
- Plan
- Supervisor Evaluation
- Approvals & Acknowledgements
- [My Reviews](#)

Plan for Sam Spartan

The purpose of the Mid-Year Check-In is to acknowledge that you have received feedback from regarding your performance thus far.

Use the comment section at the bottom of your page to provide any relevant information regarding your Mid-Year Check-In. Click "Acknowledge" to move the plan to the next step.

Actions

- Print
- Acknowledge

SHRA Performance Plan

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: April 20, 2018 13:56

Last Completed Step: Mid-Year Check-In

Acknowledgements

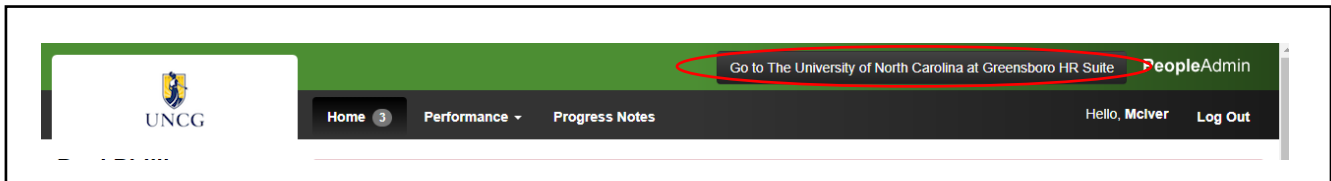
[Employee Acknowledgement of Plan](#)

Institutional Goals

The University of North Carolina System has established five institutional goals for all University SHRA employees and an additional Institutional goal for supervisors. The institutional goals provide a comprehensive appraisal platform that covers every aspect of an employee's performance in his or her role.

1. Familiarize yourself with each institutional goal and the "meeting expectations" standard for each goal. Reference the Institutional Goals Guidance Table.
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3. Assign a weight to each institutional goal based on its relevance and importance to the employee's position. Each goal must be at least 5%. The total weight of the institutional goals must equal 50%

To return to the SpartanTalent ePerformance Management site, click the 'Go to the University of North Carolina at Greensboro HR Suite' button in the top right-hand corner.



Employee Acknowledgement of Appraisal

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

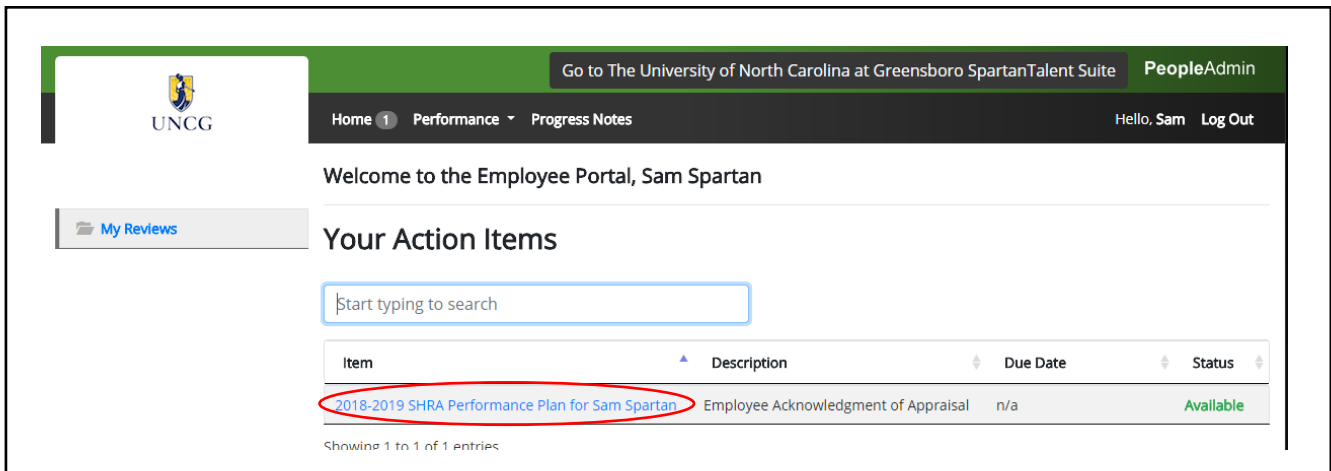


Once logged in, click the 'Go to ePerformance' link in the upper left-hand corner of your page

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

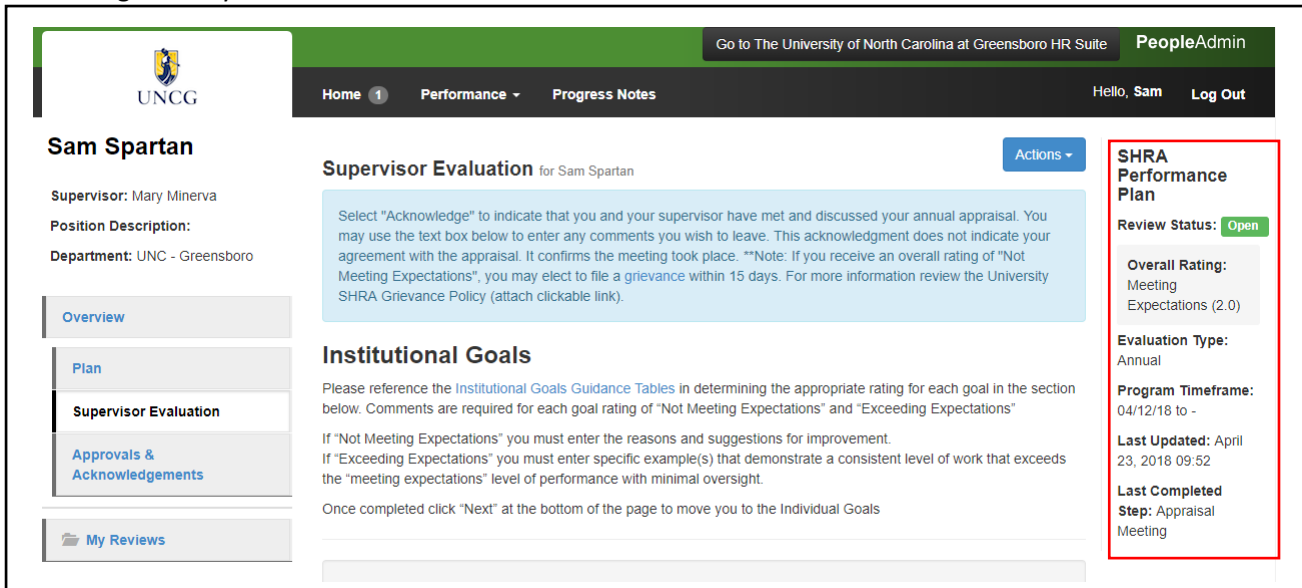
When you reach the UNC Greensboro Employee Portal, the first screen you will see is 'Your Action Items'. This will be a list of items that require your attention. Note any 'Due Date(s)' indicated.

'Item' indicates the review type (Annual, Off-Cycle Review, etc.) 'Description' indicates the current process step and/or required action. To review your supervisor's evaluation of your performance, select the description title that reads 'Employee Acknowledgement of Appraisal'.



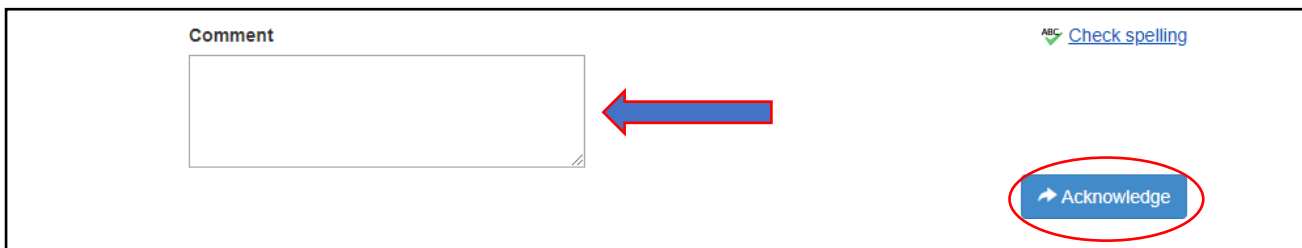
When you choose **'Employee Acknowledgement of Appraisal'** the following screen will appear. You will see your overall rating on the right- hand side of your screen. If you have overall ratings of **'Exceeding Expectations'** and have a disciplinary action on file, the highest overall rating you can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

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



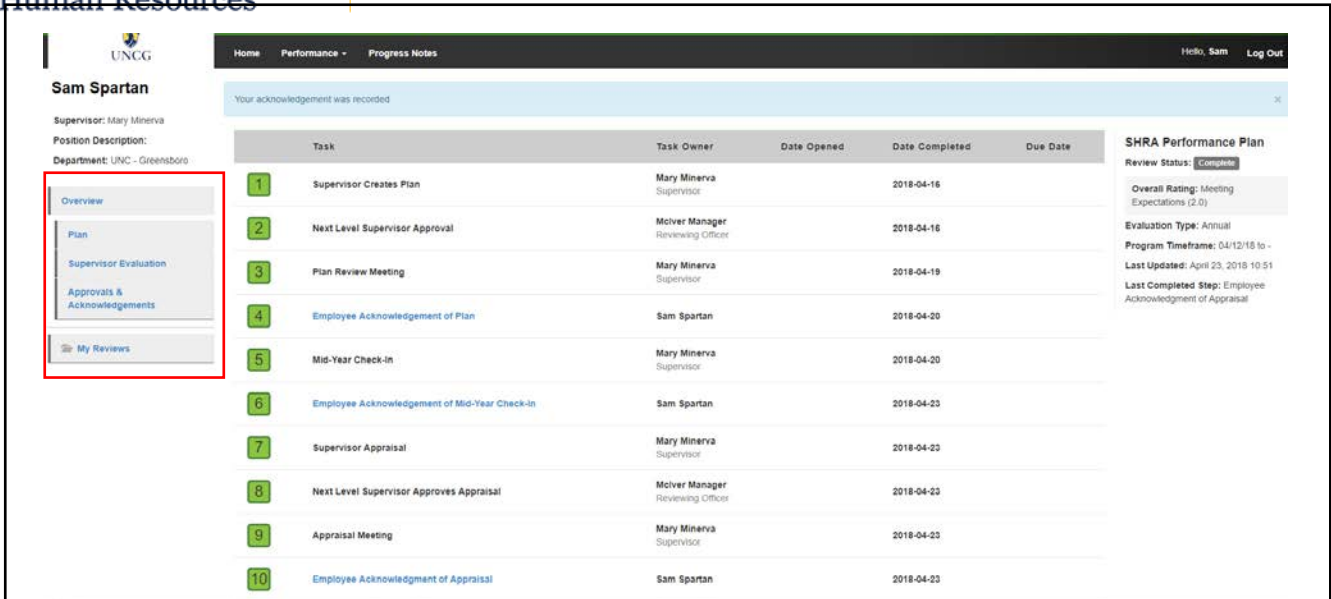
When you have completed a review of your evaluation information, type any comments as necessary in the **'Comments'** box and click the **'Acknowledge'** button at the bottom of the page. Choosing the **'Acknowledge'** button indicates that you have reviewed your evaluation and the documented work assessment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

Note: Choosing **'Acknowledge'** brings the Evaluation review process to successful completion.



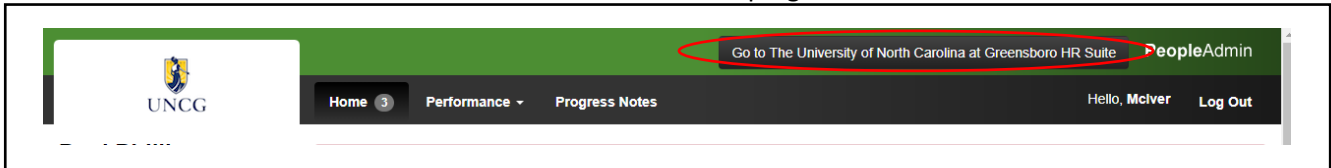
Once you have acknowledged your evaluation, the screen below will appear. On this screen, you may review your Plan, your Approvals and Acknowledgements, and add Progress Notes.

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



Congratulations!

You have successfully completed all required process steps associated with the ePerformance 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

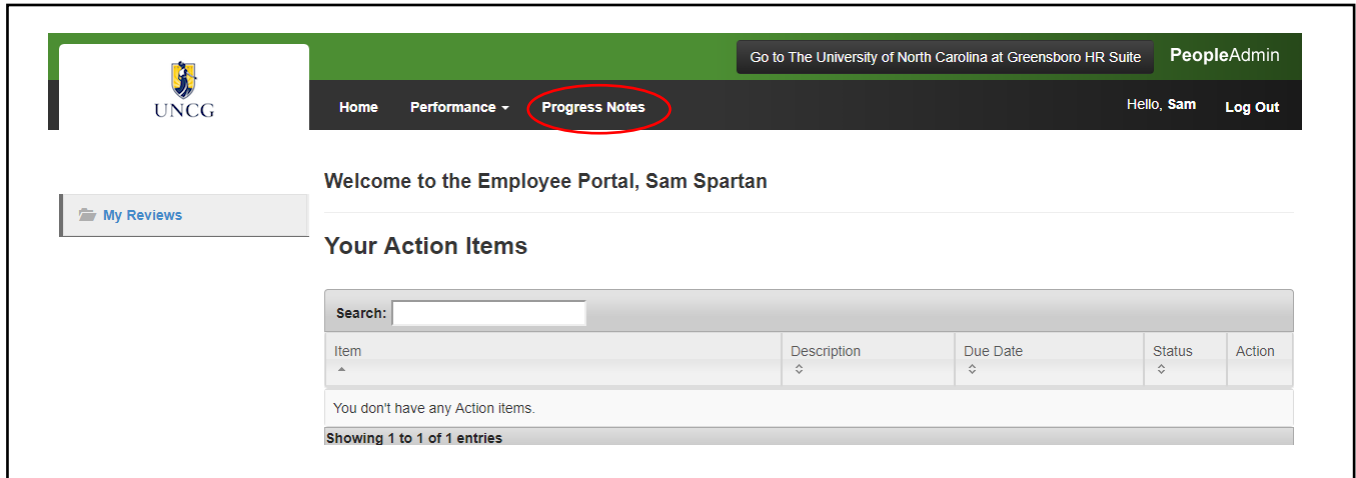
At any time after you have acknowledged your performance plan, you may use the Progress Notes functionality to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching. Progress Notes are your personal records to assist with completion of the performance 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.



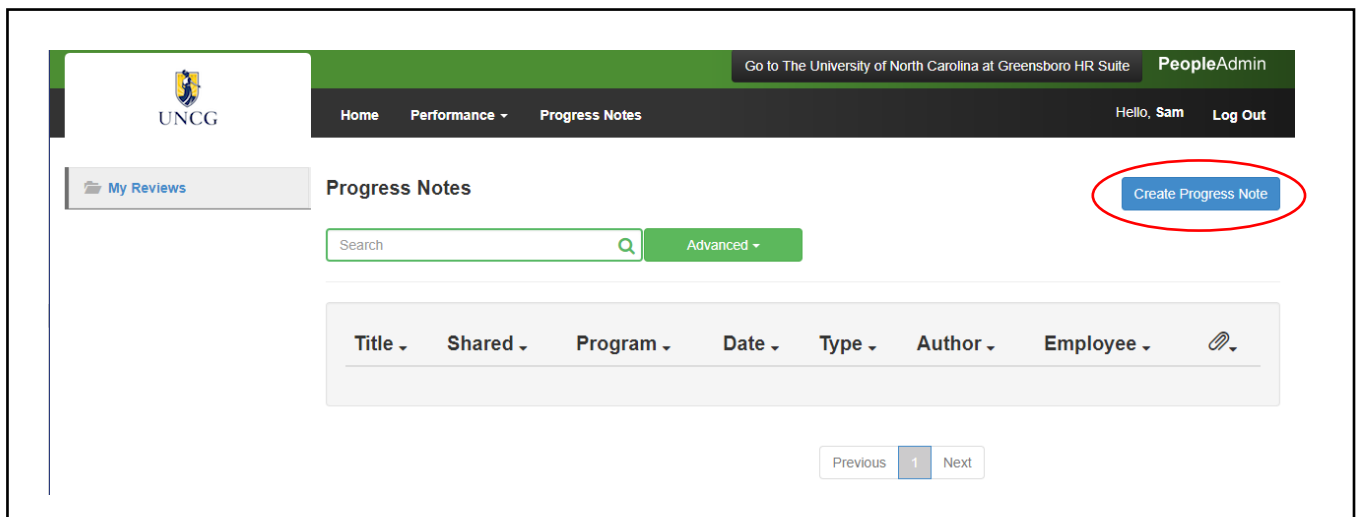
Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page.
Note, you can access this link from any module and log in as any user type.

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.



The screenshot shows the 'Your Action Items' page in the employee portal. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes' (circled in red). The main content area displays a search bar and a table with columns for Item, Description, Due Date, Status, and Action. A message states 'You don't have any Action items.' and 'Showing 1 to 1 of 1 entries'.

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



The screenshot shows the 'Progress Notes' page in the employee portal. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes'. A blue button labeled 'Create Progress Note' is circled in red. Below the navigation bar is a search bar with a magnifying glass icon and an 'Advanced' dropdown menu. A table with columns for Title, Shared, Program, Date, Type, Author, Employee, and a pencil icon is visible. At the bottom, there are 'Previous', '1', and 'Next' navigation buttons.

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**

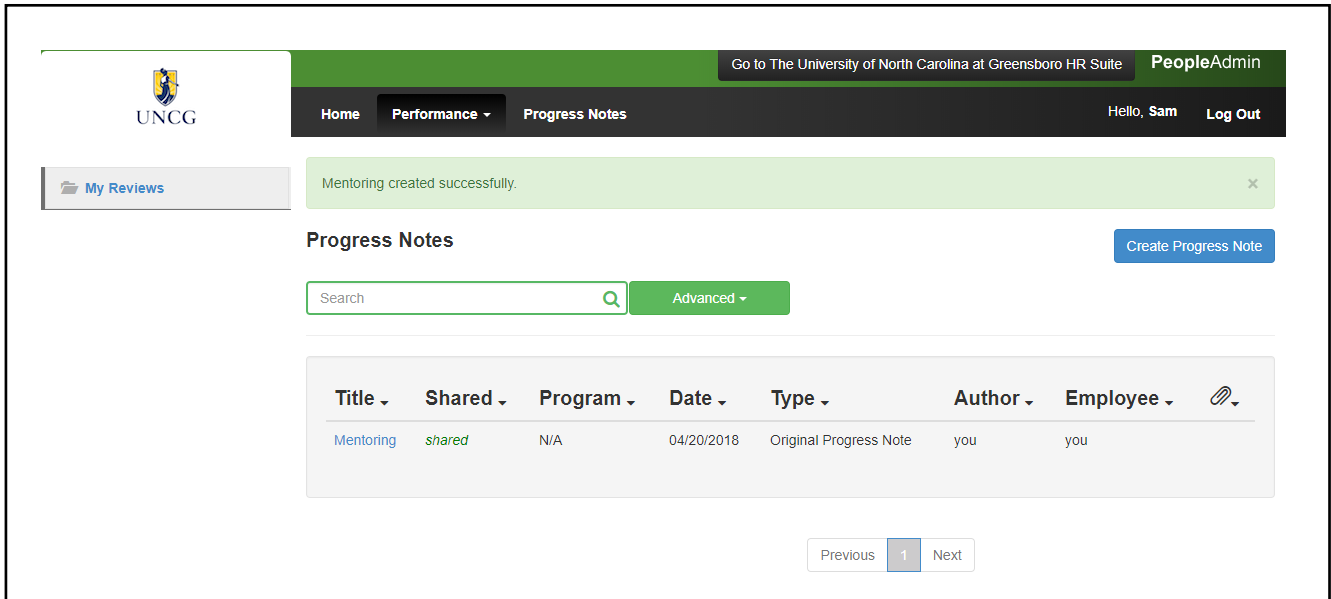
The progress notes box will ask you what program you wish to create the progress note for such as EHRA or SHRA. Required fields are **'Employee'**, as you can only enter your name just choose yourself. **'Type'** of progress note, **'Title'** of your progress note (great job on..., thanks for the help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

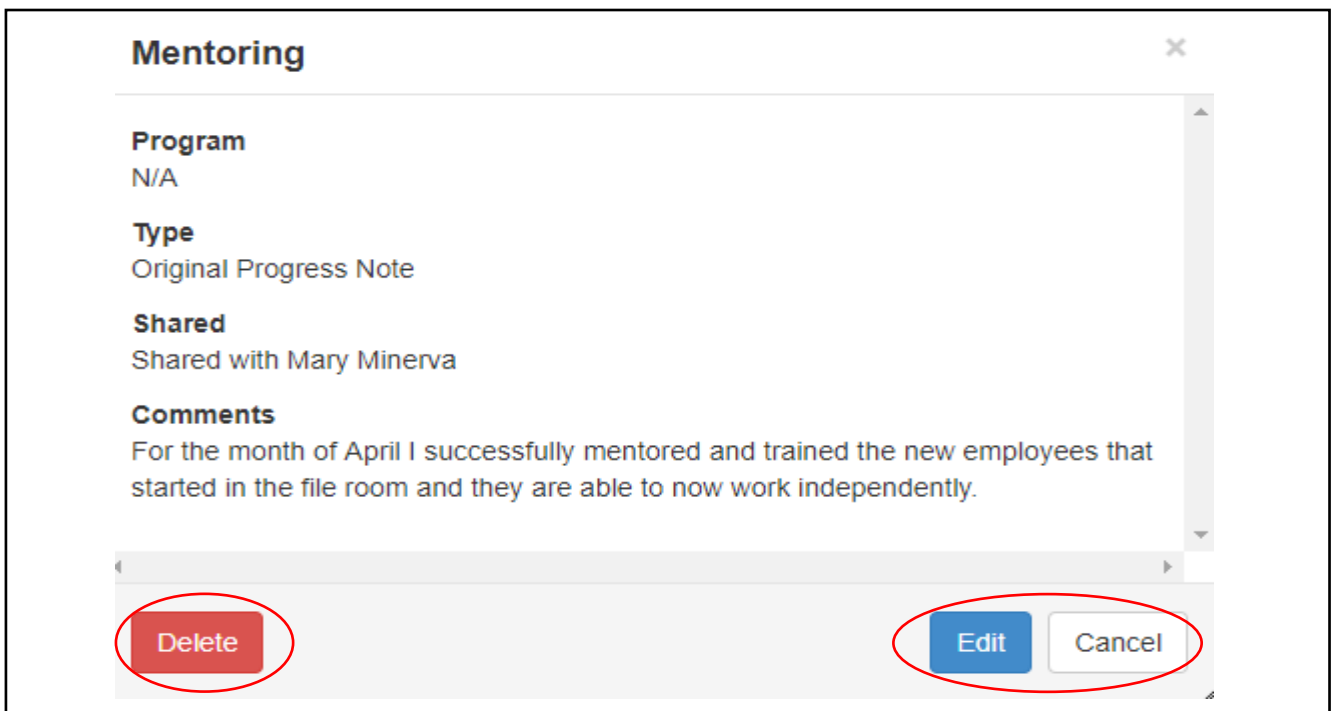
When you are finished with adding your comments or supporting documentation, click the 'Create' button at the bottom of the screen and you will see that your comments have been saved and will either be private to you or shared with your Supervisor.



The screenshot shows the 'Progress Notes' section of the HR system. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes' tabs. A user notification at the top right says 'Hello, Sam' and 'Log Out'. A green banner at the top of the main content area reads 'Mentoring created successfully.' Below this, the 'Progress Notes' section features a search bar and a 'Create Progress Note' button. A table lists progress notes with columns for Title, Shared, Program, Date, Type, Author, and Employee. The table contains one entry: 'Mentoring' (shared), 'N/A', '04/20/2018', 'Original Progress Note', 'you', and 'you'. At the bottom of the table, there are 'Previous', '1', and 'Next' navigation buttons.

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.

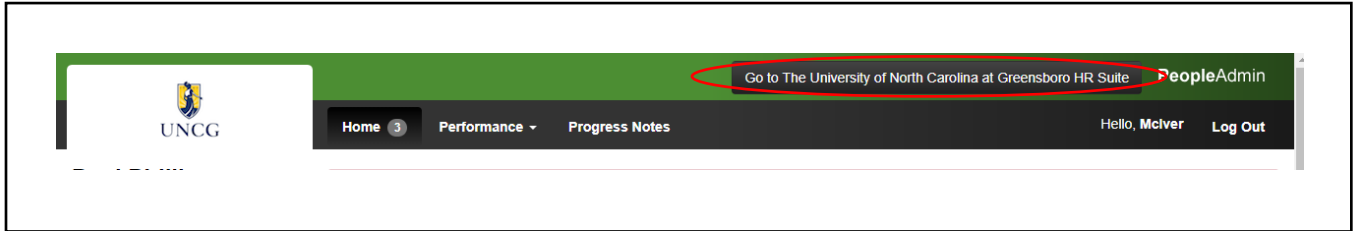


The screenshot shows the details of a 'Mentoring' progress note. The title is 'Mentoring'. The details are as follows:

- 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.

 At the bottom of the view, there are three buttons: 'Delete' (highlighted with a red circle), 'Edit' (highlighted with a red circle), and 'Cancel' (highlighted with a red circle).

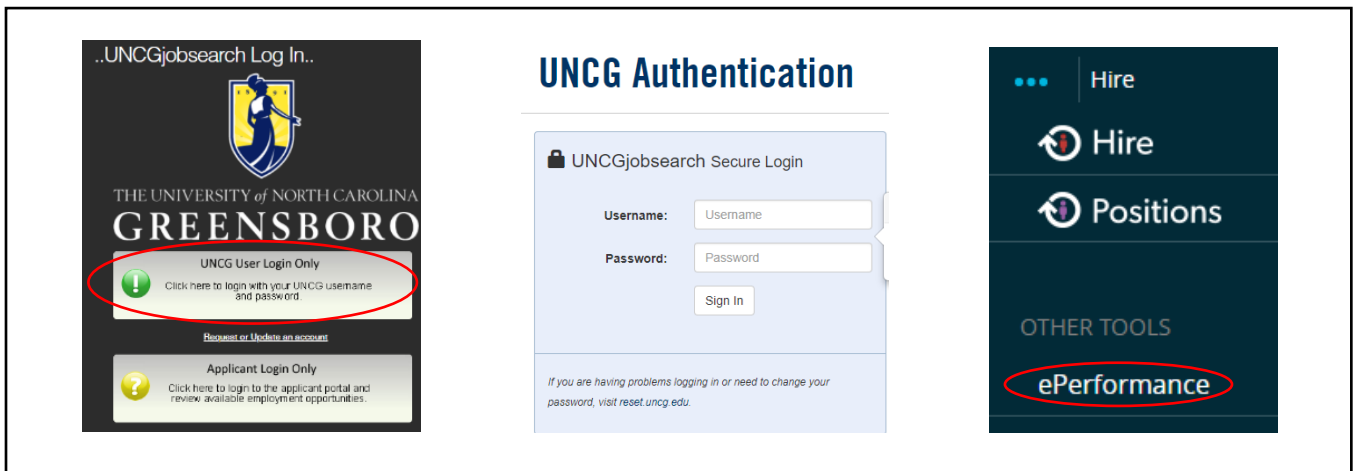
To return to the SpartanTalent ePerformance Management site, click the 'Go to the University of North Carolina at Greensboro HR Suite' button in the top right-hand corner.



Off-Cycle Reviews

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

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

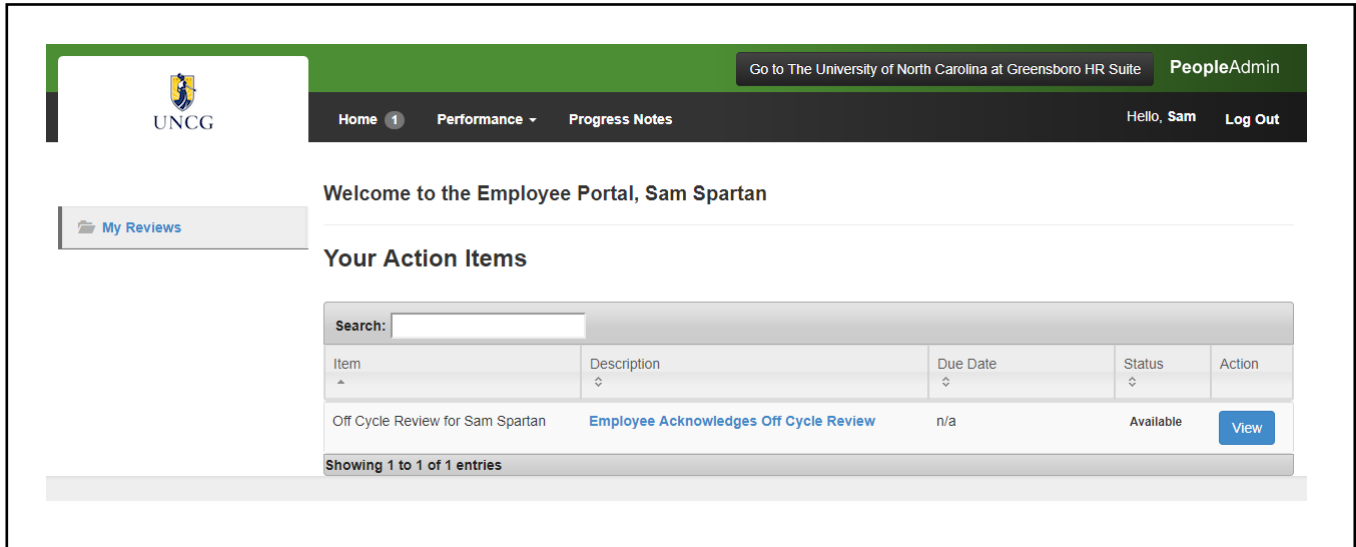


Once logged in, click the 'Go to ePerformance' link in the upper right-hand corner of your page

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

When you reach the UNC Greensboro Employee Portal, the first screen you will see is ‘Your Action Items’. This will be a list of items that require your attention.

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

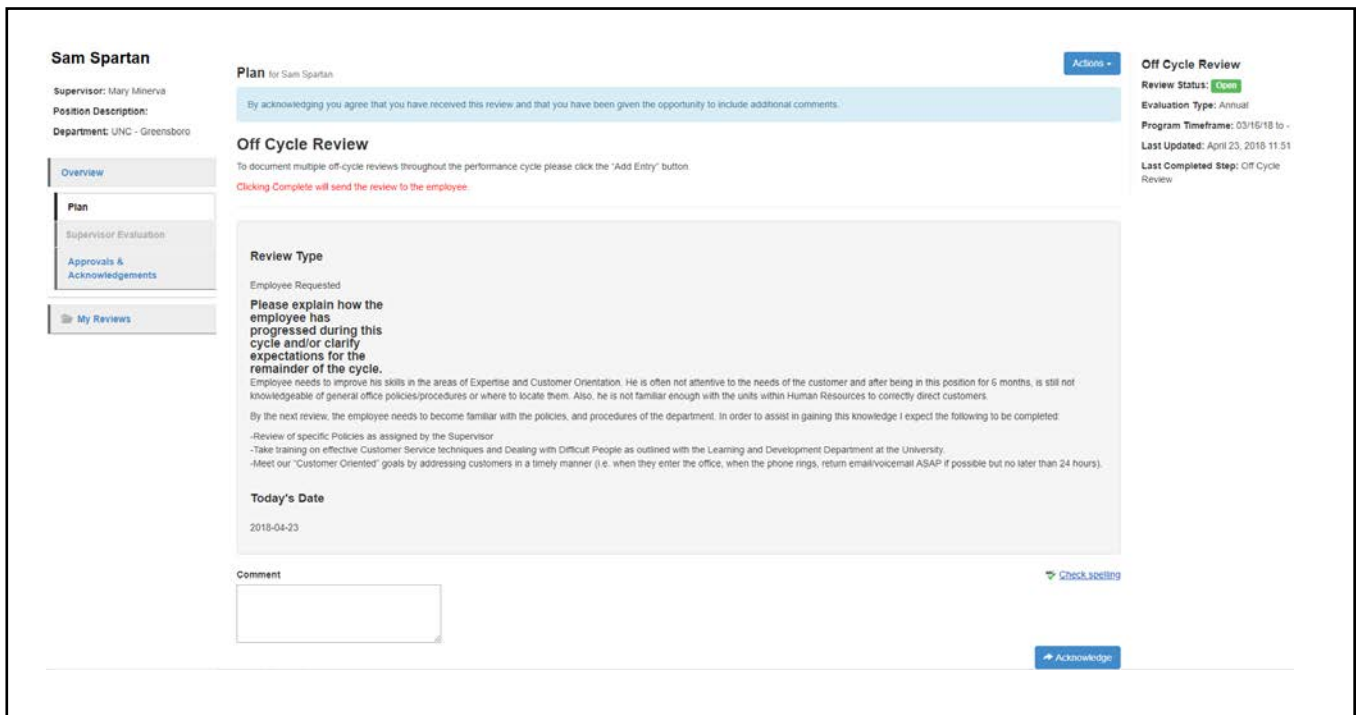


The screenshot shows the Employee Portal interface. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes'. A user greeting 'Hello, Sam' and a 'Log Out' button are visible. Below the navigation, a welcome message reads 'Welcome to the Employee Portal, Sam Spartan'. A 'My Reviews' button is on the left. The main section is titled 'Your Action Items' and contains a search bar and a table with the following data:

Item	Description	Due Date	Status	Action
Off Cycle Review for Sam Spartan	Employee Acknowledges Off Cycle Review	n/a	Available	View

Below the table, it indicates 'Showing 1 to 1 of 1 entries'.

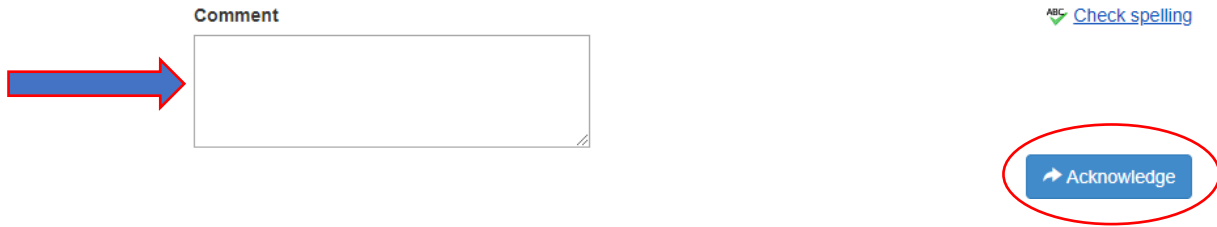
Once the Off-Cycle Review is selected, the following screen will appear. Here you will view the following information.



The screenshot shows the 'Off Cycle Review' details page for Sam Spartan. The page is divided into several sections:

- Plan for Sam Spartan:** A blue box with the text: 'By acknowledging you agree that you have received this review and that you have been given the opportunity to include additional comments.'
- Off Cycle Review:** A section with instructions: 'To document multiple off-cycle reviews throughout the performance cycle please click the "Add Entry" button. Clicking Complete will send the review to the employee.'
- Review Type:** A section titled 'Employee Requested' with the instruction: 'Please explain how the employee has progressed during this cycle and/or clarify expectations for the remainder of the cycle.' It includes a detailed paragraph about the employee's performance and a list of expectations for the next review.
- Today's Date:** 2018-04-23
- Comment:** A text input field for providing feedback.
- Actions:** A blue 'Acknowledge' button at the bottom right.
- Off Cycle Review Summary:** A sidebar on the right showing 'Review Status: Open', 'Evaluation Type: Annual', 'Program Timeframe: 03/15/18 to -', 'Last Updated: April 23, 2018 11:51', and 'Last Completed Step: Off Cycle Review'.

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



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

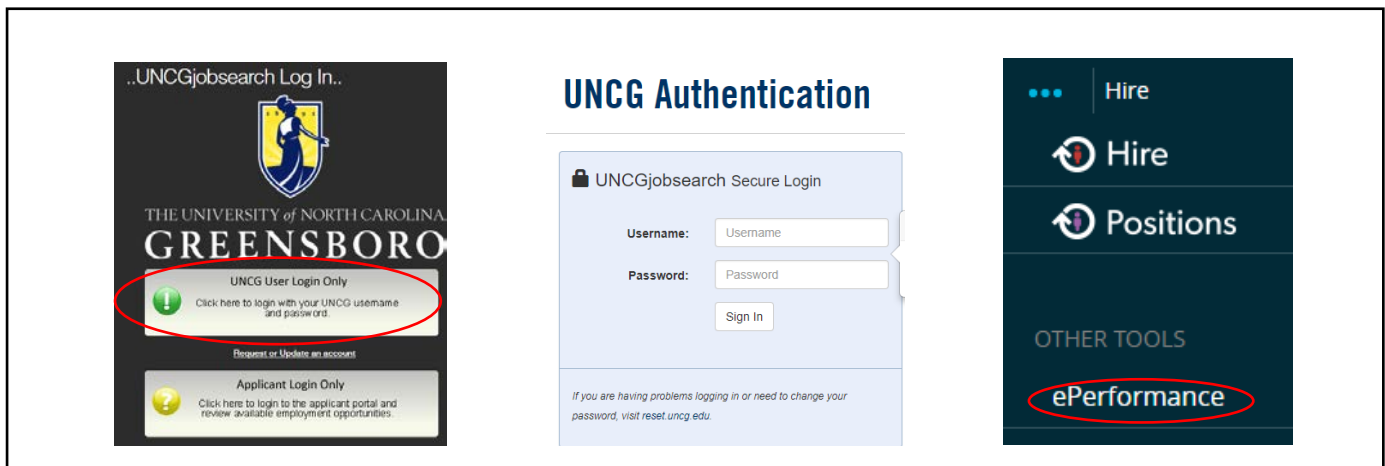
Note: There is one mandatory 'Off-Cycle' review due and that is the 'Mid-Year Check-In'. You may request additional Off-Cycle reviews provided it has been longer than 60 days from your last review.

Quarterly Probationary Review

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

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

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

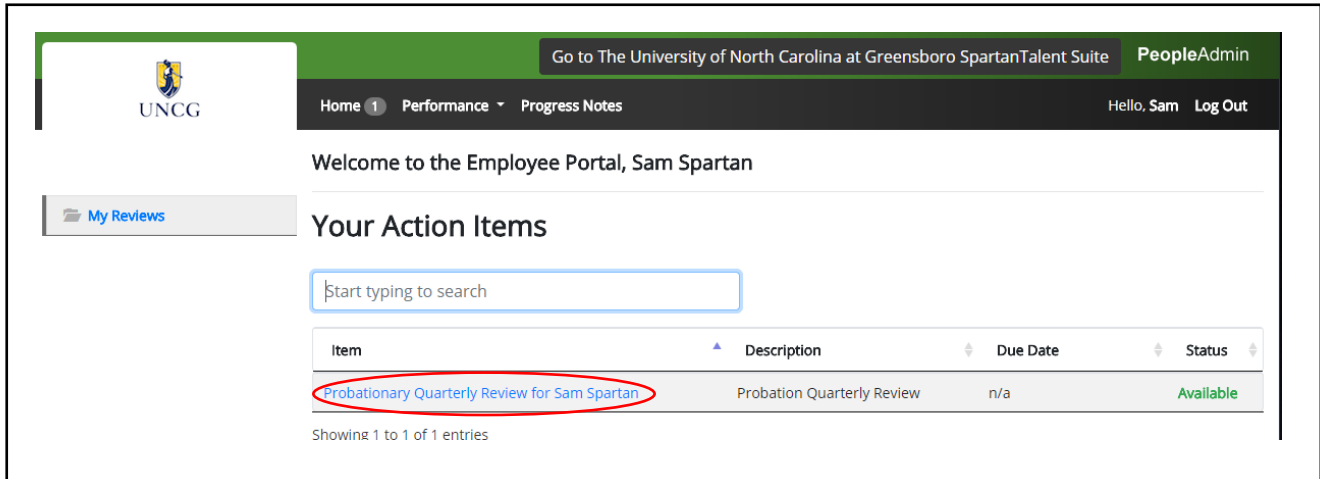


Once logged in, click the '**Go to ePerformance**' link in the upper left-hand corner of your page

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

When you reach the UNC Greensboro Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention.

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



The screenshot shows the 'Your Action Items' section of the Employee Portal. It includes a search bar with the placeholder text 'Start typing to search'. Below the search bar is a table with the following data:

Item	Description	Due Date	Status
Probationary Quarterly Review for Sam Spartan	Probation Quarterly Review	n/a	Available

Below the table, it says 'Showing 1 to 1 of 1 entries'.

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

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

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

It is **not** recommended that you **'Acknowledge'** the Probationary quarterly review if you have not had communication with your supervisor prior to submission.

Sam Spartan

Supervisor: Mary Minerva
Position Description:
Department: UNC - Greensboro

- Overview
- Supervisor Evaluation**
- Approvals & Acknowledgements
- My Reviews

Supervisor Evaluation for Sam Spartan Actions ▾

By acknowledging, you agree that you have received this review and that you have been given the opportunity to include additional comments.

I understand that my acknowledgment does not imply agreement with the statements made in this Performance document.

Probation Quarterly Review

Based on your expectations at this point in the Performance Cycle, please document employee's job performance.

Today's Date

2018-06-25

Please explain how the employee has progressed during this quarter and/or clarify expectations for the remainder of the probationary period.

Sam continues to make excellent progress with integrating with higher education and settling into the day to day activities on the University. I would like to see more progress with banner and understanding what codes do within the program. When it comes to dealing with incoming students or faculty, all are treated with respect and professionalism. Sam also works well with his peers and is a positive influence on the office.

Comment [Check spelling](#)

Acknowledge

Probationary Quarterly Review

Review Status: Open

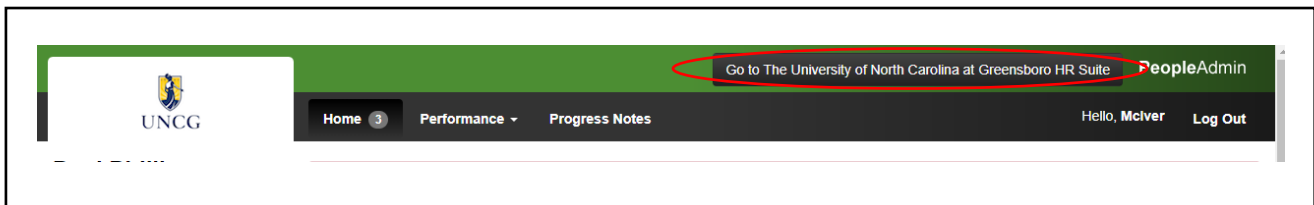
Evaluation Type: Annual

Program Timeframe: 03/16/18 to -

Last Updated: June 25, 2018 10:01

Last Completed Step: Probation Quarterly Review

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 PeopleAdmin system. On the left is the UNCG logo. In the center, there are links for Home (with a notification badge), Performance (with a dropdown arrow), and Progress Notes. On the right, it says 'Hello, McIver' and 'Log Out'. A red oval highlights the button labeled 'Go to The University of North Carolina at Greensboro HR Suite'.

This concludes the training for SHRA Employees for ePerformance. If you have any questions not covered in this training, please contact the Human Resource office at 336-334-5009 or you may submit a query by following: https://uncg.qualtrics.com/jfe/form/SV_7WluplFY03m69w1