

SPARTANTALENT EPERFORMANCE SHRA SUPERVISOR USER GUIDE

Stay on target with



ePerformance



UNC
GREENSBORO
Human Resources

UNCG



UNCG Human Resources

SPARTAN TALENT e-Performance -Supervisor Guide

Table of Contents

Navigating the SpartanTalent ePerformance Module.....2

 Logging in and accessing the Employee Portal.....2

 Your Action Items.....2

 Searching and Dashboard.....3

Performance Plan Process Steps.....7

 Create SHRA Performance Plan.....7

 Copy Performance Plan to Other Like Positions.....13

 Next-Level Supervisor Approves Performance Plan.....18

 Completing the Supervisor/Employee Performance Plan Meeting.....21

 Mid-Year Check-In.....23

 Revise Performance Plan.....24

Using Progress Notes.....25

Annual Review Process Steps.....30

 Supervisor Appraisal.....30

 Next-Level Supervisor Approves Appraisal.....34

 Supervisor/Employee Appraisal Discussion.....38

 Revise Employee Appraisal.....41

Optional Co-Reviewer.....41

Off-Cycle Reviews.....44

 Scenario 1. Employee’s First Off-Cycle Review in Current Performance Cycle.....44

 Scenario 2. Employees Second Off-Cycle Review in Current Performance Cycle.....46

 Final Off-Cycle Review-Completes the Process.....49

Quarterly Probation Review.....49

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.



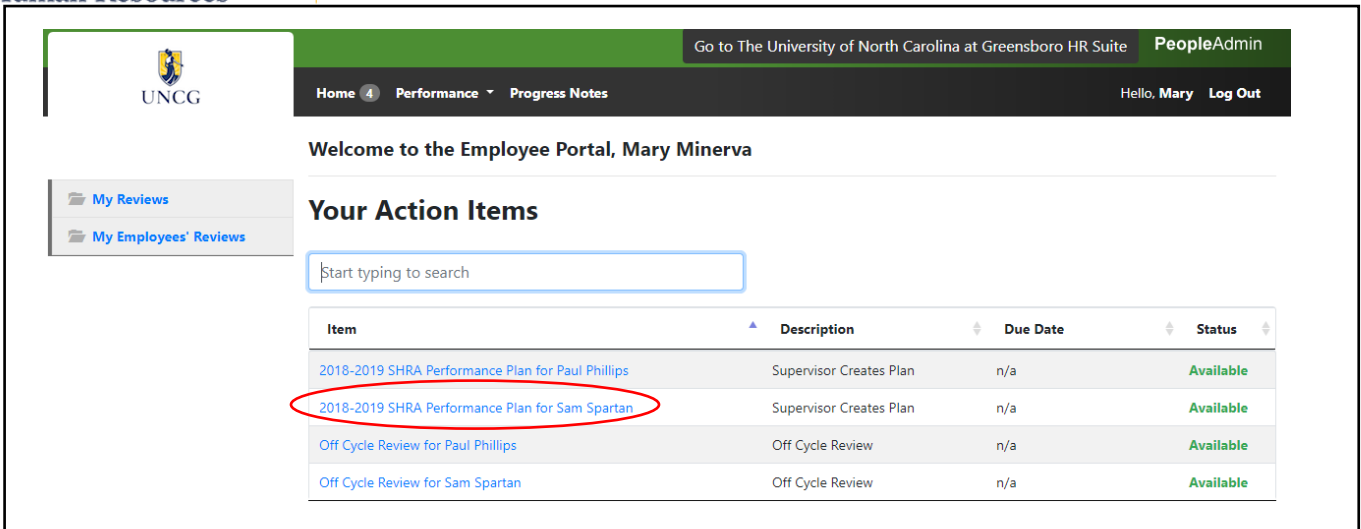
Once logged in, click the **‘Go to ePerformance’** link in the upper left-hand corner of your page.

Note, you can access this link from any 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. 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 HR Suite **PeopleAdmin**

Home 4 Performance Progress Notes Hello, Mary Log Out

Welcome to the Employee Portal, Mary Minerva

Your Action Items

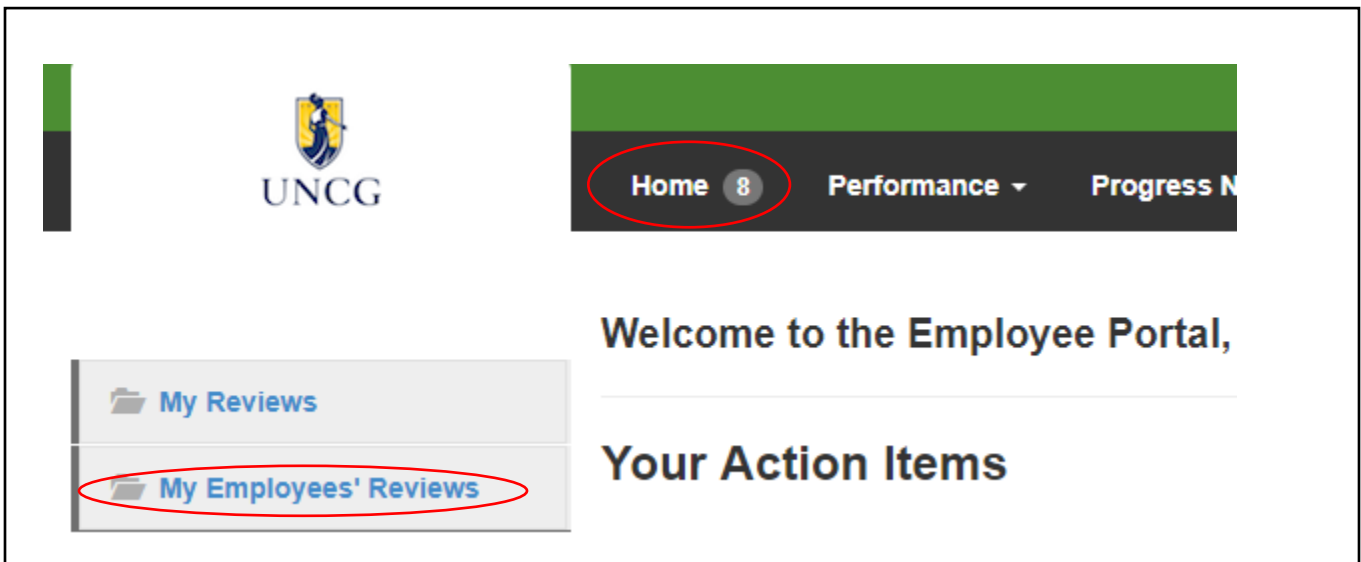
Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Supervisor Creates Plan	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	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 Progress N

Welcome to the Employee Portal,

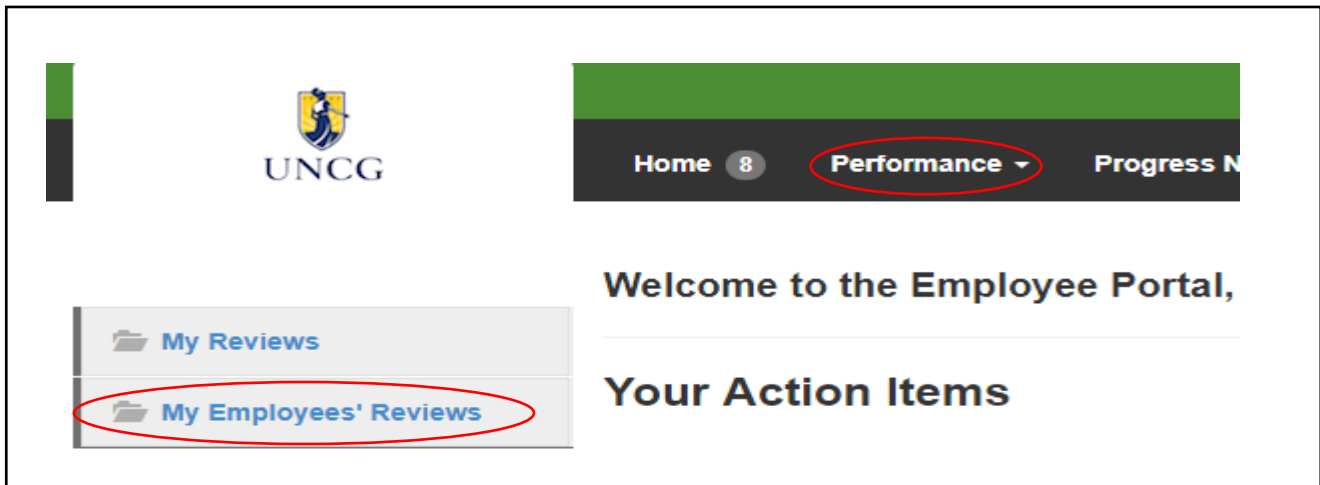
Your Action Items

My Reviews

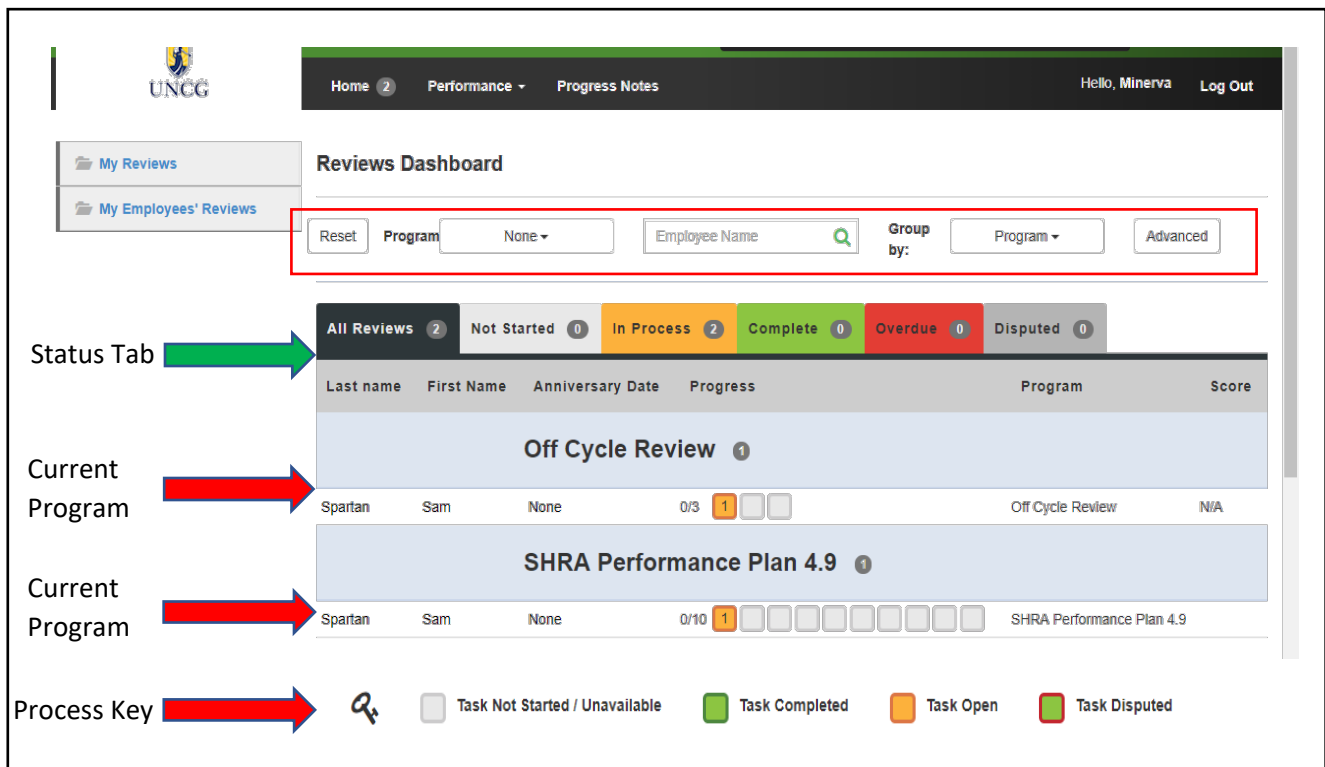
My Employees' Reviews

Searching and Dashboard

You can search for employee reviews by going to the 'Performance' menu at 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 email jmfeth@uncg.edu) 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.



Reviews Dashboard

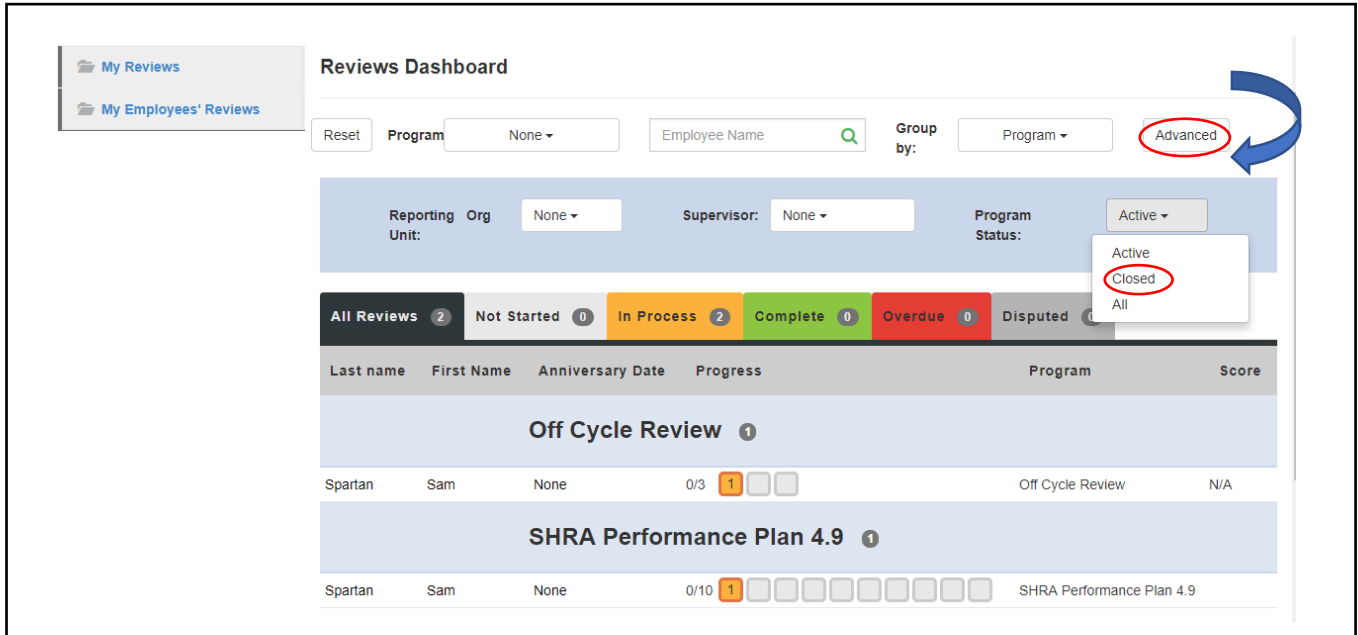
Reset Program None ▾ Employee Name Group by: Program ▾ Advanced

Status Tab → **All Reviews** 2 Not Started 0 In Process 2 Complete 0 Overdue 0 Disputed 0

Last name	First Name	Anniversary Date	Progress	Program	Score
Off Cycle Review 1					
Spartan	Sam	None	0/3 1	Off Cycle Review	N/A
SHRA Performance Plan 4.9 1					
Spartan	Sam	None	0/10 1	SHRA Performance Plan 4.9	

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 plans and evaluations.

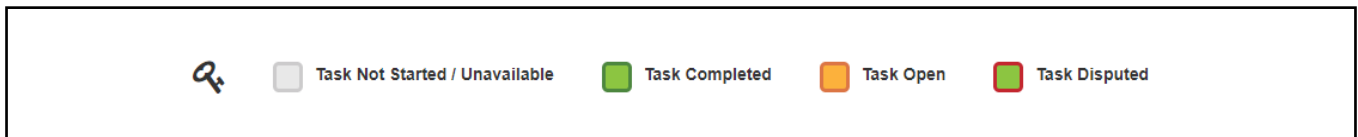


The screenshot shows the 'Reviews Dashboard' interface. At the top, there are filter options: 'Reset', 'Program' (set to 'None'), 'Employee Name' (with a search icon), and 'Group by:' (set to 'Program'). A blue arrow points to the 'Advanced' filter button, which is circled in red. Below these are 'Reporting Org Unit:' (set to 'None'), 'Supervisor:' (set to 'None'), and 'Program Status:' (set to 'Active'). A dropdown menu for 'Program Status' is open, showing 'Active', 'Closed' (circled in red), and 'All'. Below the filters are summary cards for 'All Reviews' (2), 'Not Started' (0), 'In Process' (2), 'Complete' (0), 'Overdue' (0), and 'Disputed'. A table below shows two review entries:





Last name	First Name	Anniversary Date	Progress	Program	Score
Off Cycle Review 1					
Spartan	Sam	None	0/3 1 <input type="checkbox"/> <input type="checkbox"/>	Off Cycle Review	N/A
SHRA Performance Plan 4.9 1					
Spartan	Sam	None	0/10 1 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	SHRA Performance Plan 4.9	

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 occur 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.

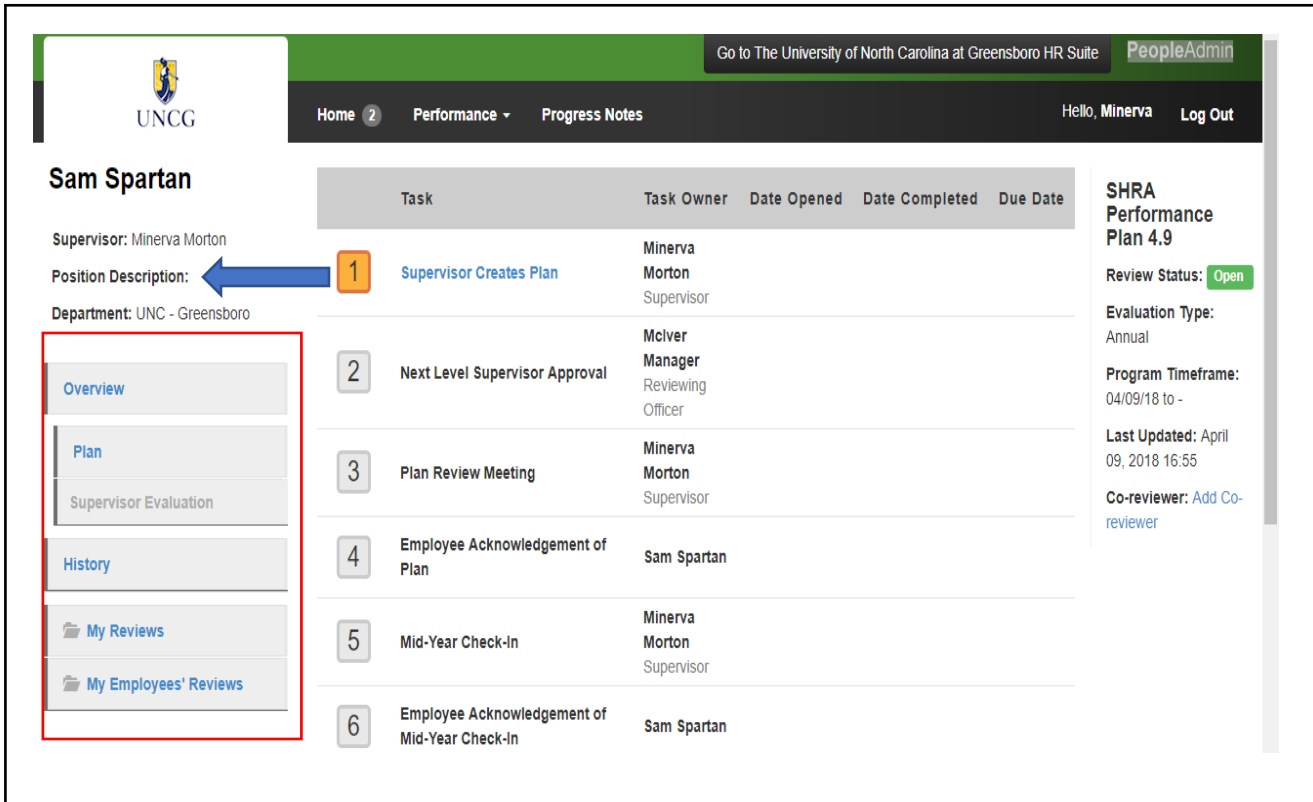


Legend for task status:

-  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)

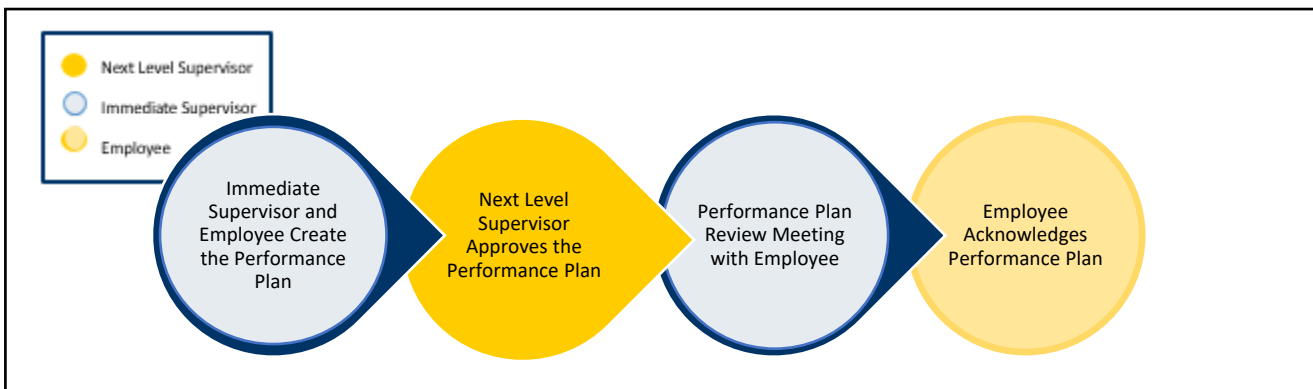


Sam Spartan
Supervisor: Minerva Morton
Position Description: [←](#)
Department: UNC - Greensboro

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Creates Plan	Minerva Morton Supervisor			
2 Next Level Supervisor Approval	McIver Manager Reviewing Officer			
3 Plan Review Meeting	Minerva Morton Supervisor			
4 Employee Acknowledgement of Plan	Sam Spartan			
5 Mid-Year Check-in	Minerva Morton Supervisor			
6 Employee Acknowledgement of Mid-Year Check-in	Sam Spartan			

SHRA Performance Plan 4.9
Review Status: Open
Evaluation Type: Annual
Program Timeframe: 04/09/18 to -
Last Updated: April 09, 2018 16:55
Co-reviewer: [Add Co-reviewer](#)

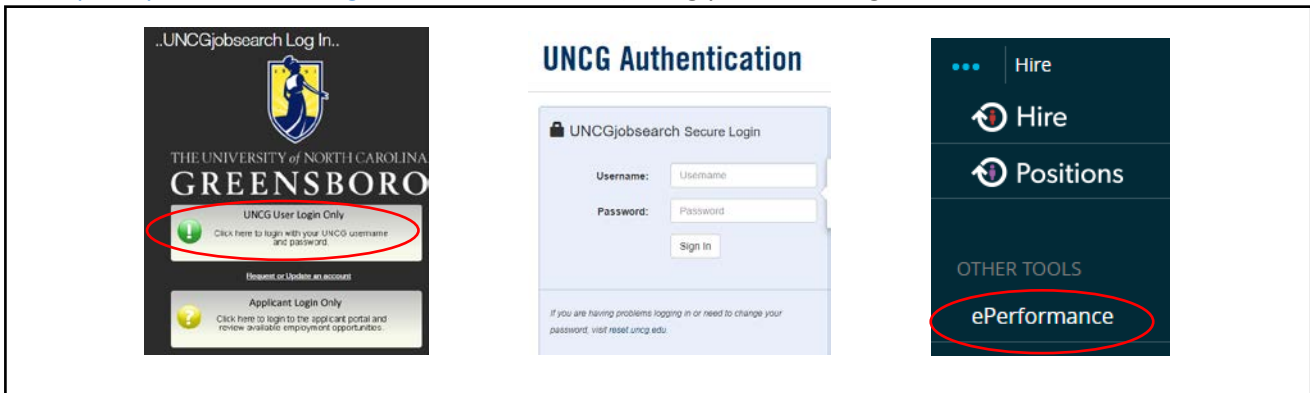
Performance Plan Process Steps



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.

Create SHRA Performance Plan

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

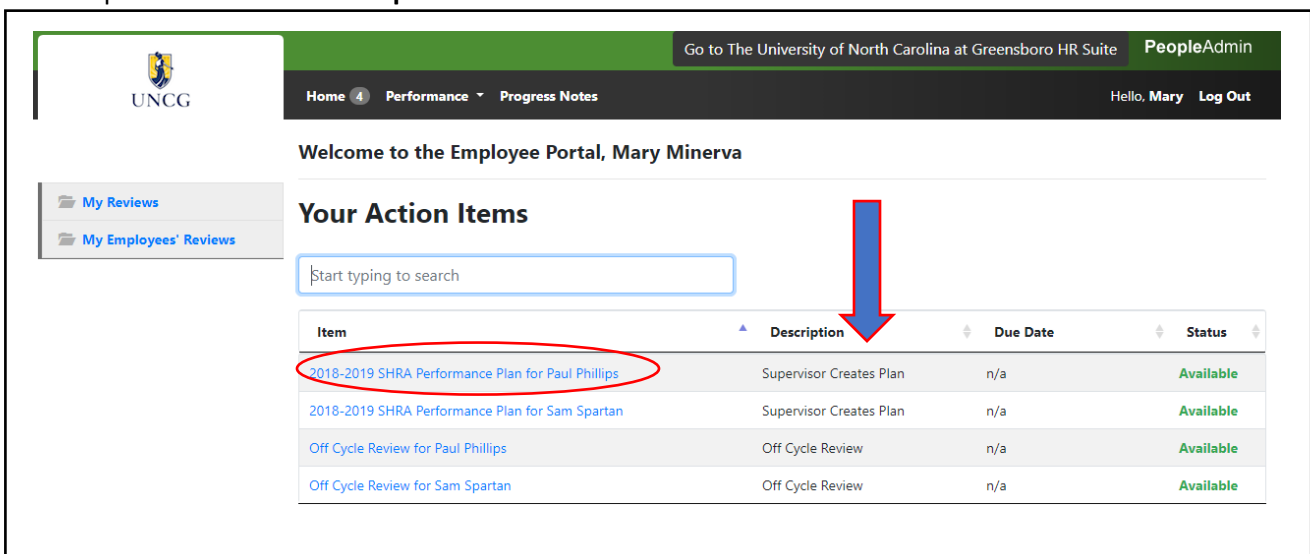


Once logged in, click the 'Go to ePerformance' link in the upper left-hand corner of your page

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

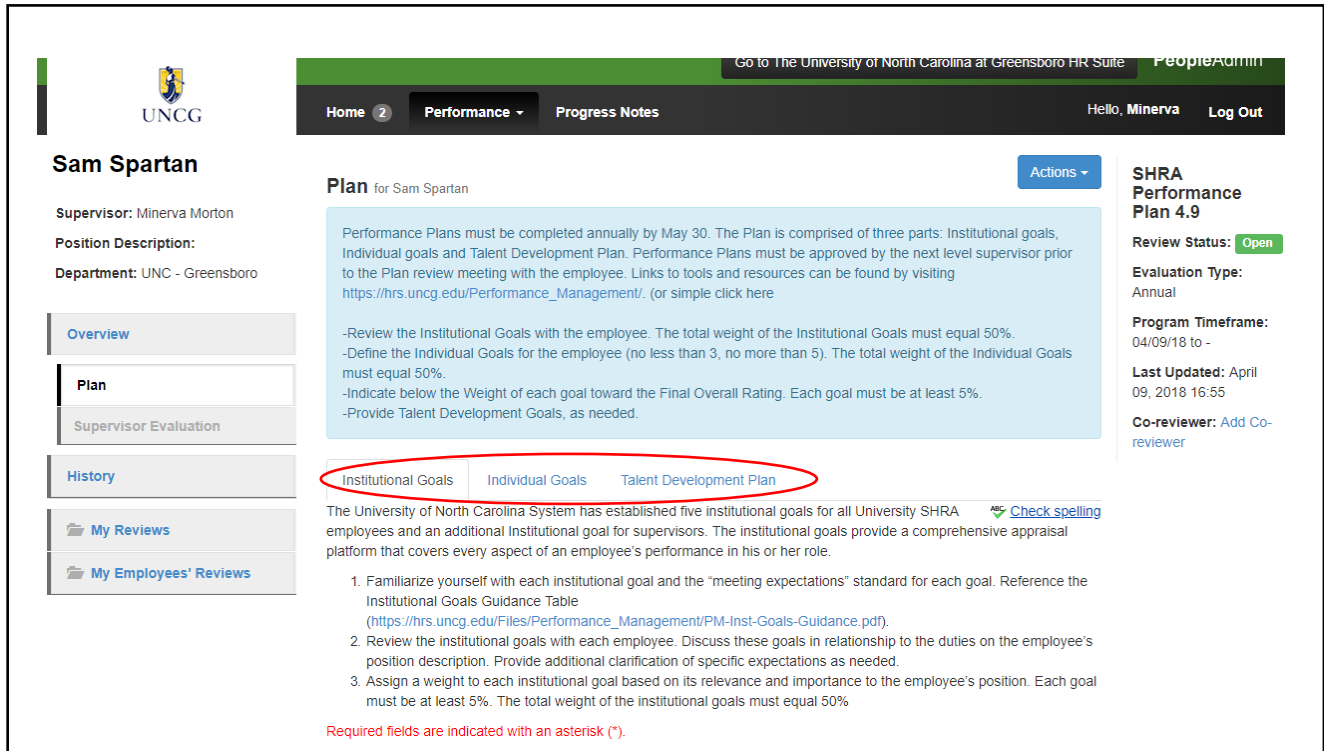
When you reach the UNC Greensboro Employee Portal, the first screen you will see is 'Your Action Items'. This will be a list of items that require your attention. Note any 'Due Date(s)' indicated.

'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'.



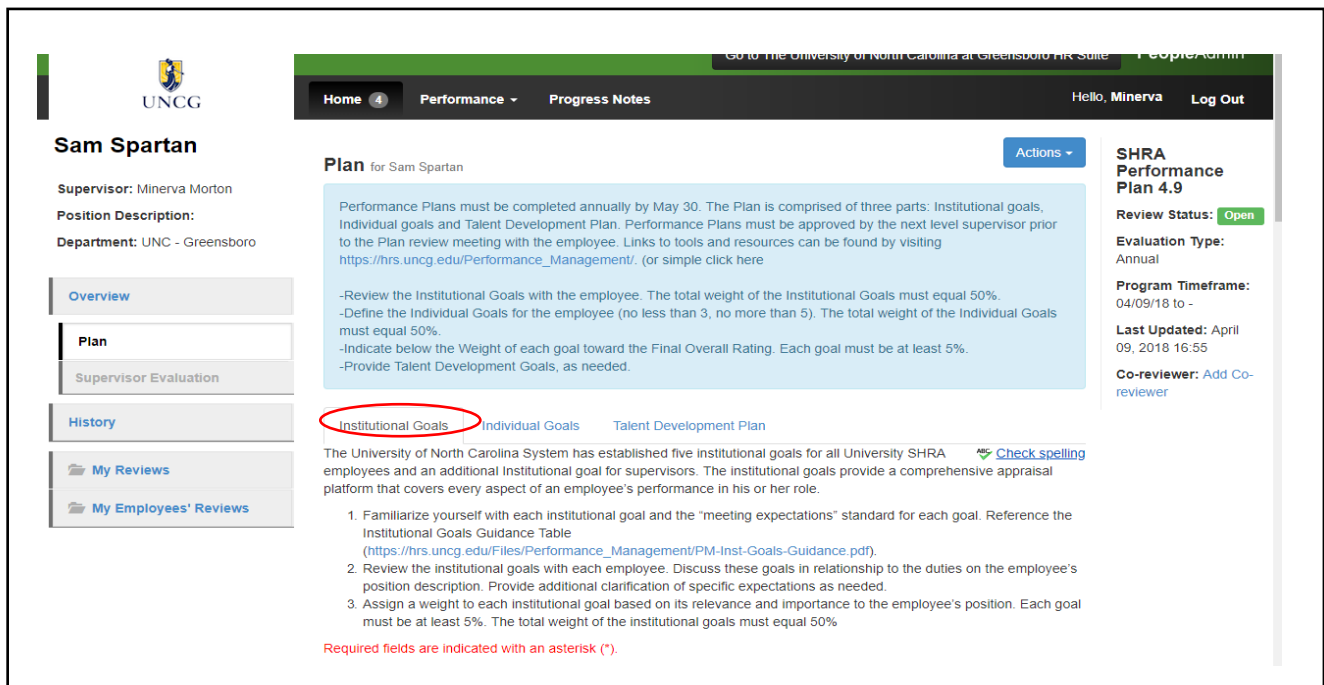
Note! Prior to the beginning of the new performance cycle, and your drafting of the new performance plan, you should sit down with your employee to discuss the department's or unit's strategic goals for the cycle. You and your employee may be able to collaborate on what individual goals and career development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

Once selected, the Performance Plan will appear. There are **three (3) tab sections** across the top of the plan.



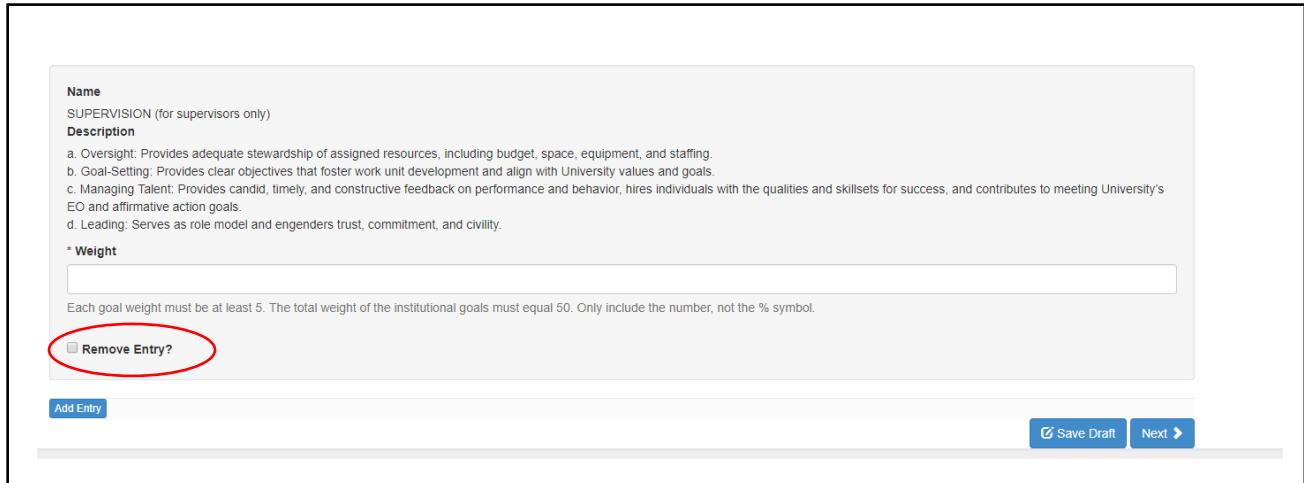
The screenshot shows the 'Performance' section for Sam Spartan. The 'Plan' section is active, displaying instructions for creating a performance plan. Three tabs are visible at the top of the plan content: 'Institutional Goals', 'Individual Goals', and 'Talent Development Plan'. The 'Institutional Goals' tab is circled in red. Below the tabs, there is a list of three numbered steps for setting institutional goals, with a note that required fields are indicated with an asterisk (*).

The **first tab** section is titled **'Institutional Goals'**. This tab is where you will enter a percentage weight for each corresponding institutional goal and any specific standards of performance if desired. You will need to provide a percentage weight of no less than 5% for each goal, and all 5 goals (6 goals if supervisor) must add up to 50%



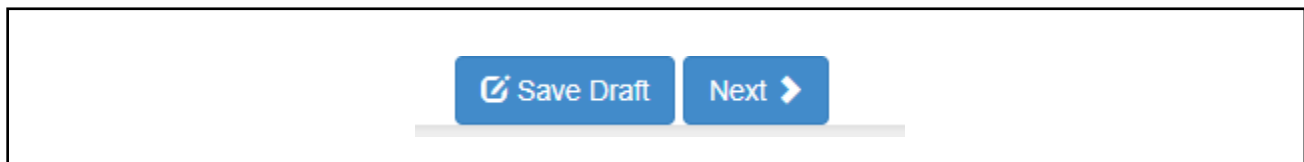
This screenshot shows the same Performance Plan interface, but with the 'Individual Goals' tab selected and highlighted with a red circle. The content below the tabs remains the same, including the numbered steps for setting institutional goals and the note about required fields.

If your employee is NOT a supervisor – be sure to click the **‘remove entry’** box at the bottom of the goal and this will take the goal away from the employee in its entirety.



The screenshot shows a form for adding a goal entry. It includes a 'Name' field with 'SUPERVISION (for supervisors only)' as a placeholder, a 'Description' field with four bullet points (a. Oversight, b. Goal-Setting, c. Managing Talent, d. Leading), and a '* Weight' field. Below the weight field is a note: 'Each goal weight must be at least 5. The total weight of the institutional goals must equal 50. Only include the number, not the % symbol.' A checkbox labeled 'Remove Entry?' is circled in red. At the bottom left is an 'Add Entry' button, and at the bottom right are 'Save Draft' and 'Next >' buttons.

When you reach the bottom of the page and have completed/edited each institutional 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).

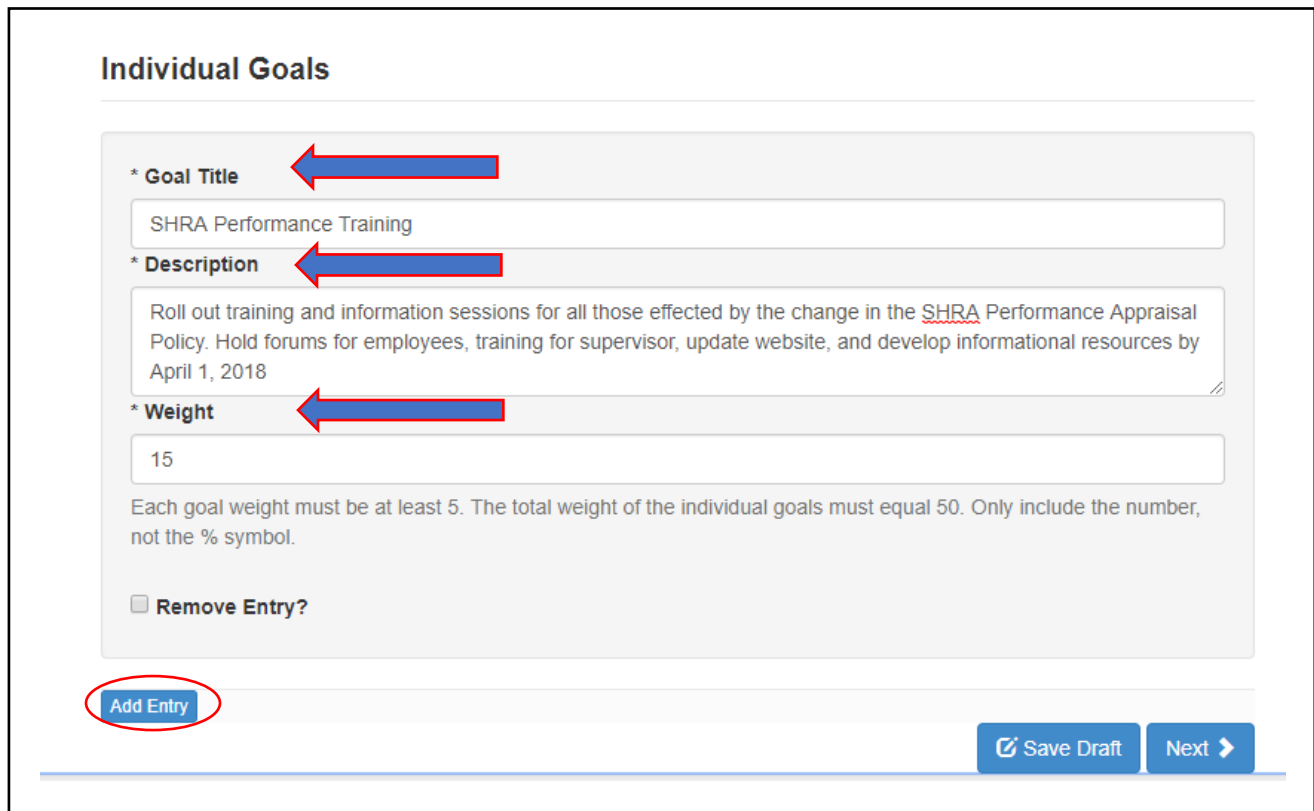


This image shows a close-up of two blue buttons: 'Save Draft' and 'Next >'. The 'Next >' button has a white right-pointing arrow.

The **second tab** section is titled **'Individual Goals'**. This is where you will enter three to five individual goals and their corresponding percentage weights. You will need to provide a percentage weight of no less than 5% for each goal, and all the individual goals must add up to 50%

Unlike the institutional goals, individual goals are NOT intended to cover all aspects of an employee's work product- these are big ticket items to be completed in this performance cycle.

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.



Individual Goals

* **Goal Title** ←

SHRA Performance Training

* **Description** ←

Roll out training and information sessions for all those effected by the change in the SHRA Performance Appraisal Policy. Hold forums for employees, training for supervisor, update website, and develop informational resources by April 1, 2018

* **Weight** ←

15

Each goal weight must be at least 5. The total weight of the individual goals must equal 50. Only include the number, not the % symbol.

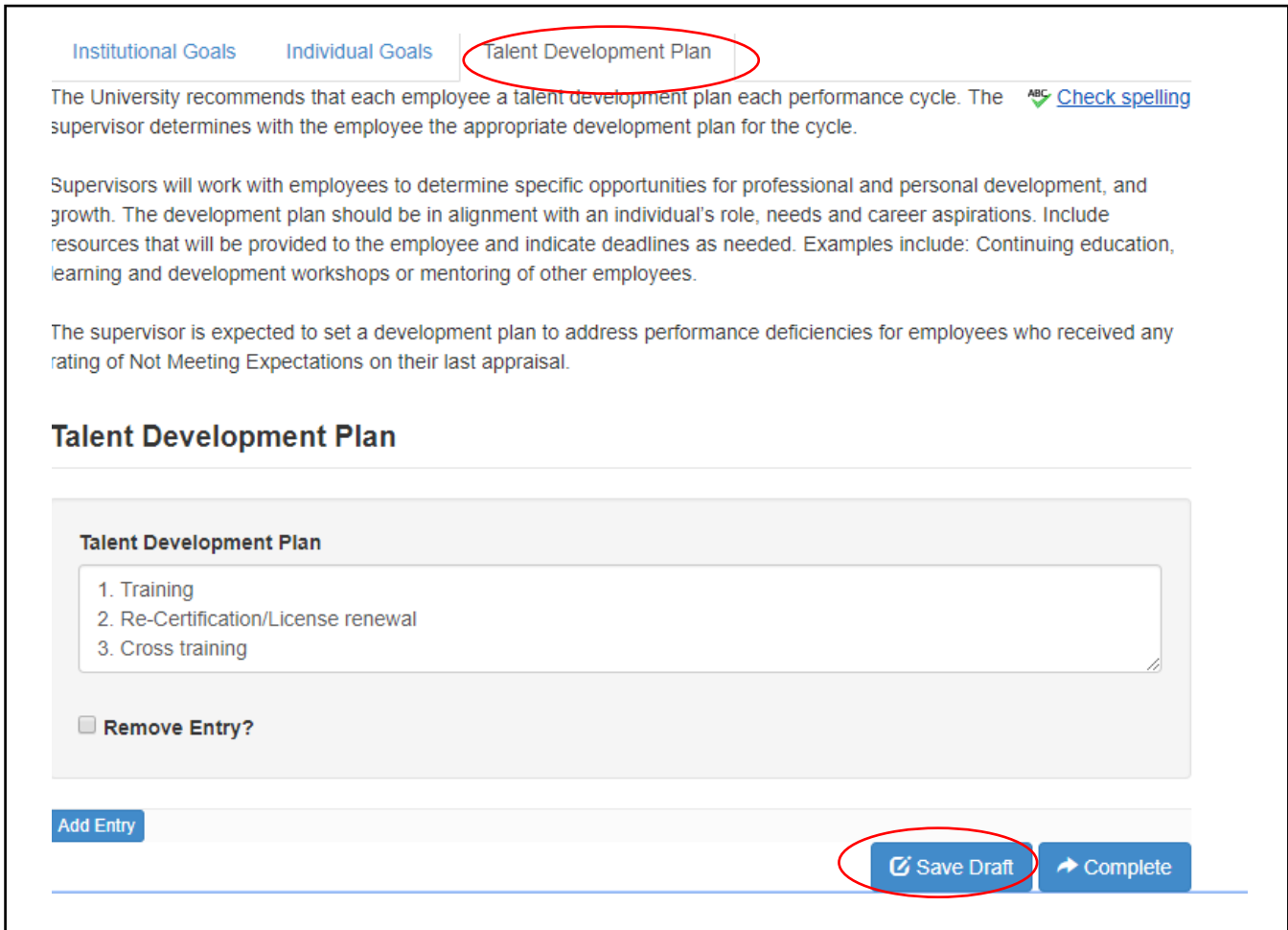
Remove Entry?

Add Entry Save Draft Next

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 talent 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.

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

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



Institutional Goals Individual Goals **Talent Development Plan**

The University recommends that each employee a talent development plan each performance cycle. The supervisor determines with the employee the appropriate development plan for the cycle. [Check spelling](#)

Supervisors will work with employees to determine specific opportunities for professional and personal development, and growth. The development plan should be in alignment with an individual's role, needs and career aspirations. Include resources that will be provided to the employee and indicate deadlines as needed. Examples include: Continuing education, learning and development workshops or mentoring of other employees.

The supervisor is expected to set a development plan to address performance deficiencies for employees who received any rating of Not Meeting Expectations on their last appraisal.

Talent Development Plan

Talent Development Plan

1. Training
2. Re-Certification/License renewal
3. Cross training

Remove Entry?

[Add Entry](#)

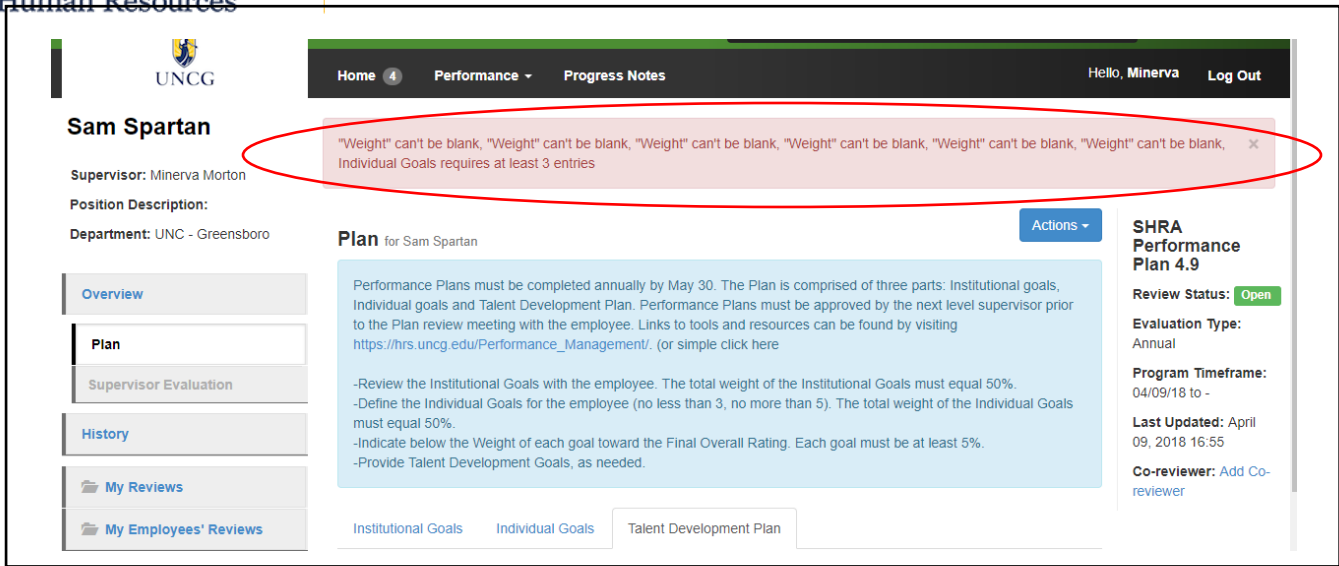
[Save Draft](#) [Complete](#)

Note: If you still need to finalize some elements in the document prior to sending it to the next level supervisor for review, choose ‘**Save Draft**’.

If you choose ‘**Complete**’ it will go to the Next-Level Supervisor for review. At this point, the Next-Level Supervisor may return the plan back to you for revising or approve it. After approval you can move forward with the performance plan meeting and employee acknowledgement of the performance plan process.



[Save Draft](#) [Complete](#)



UNCG Home Performance Progress Notes Hello, Minerva Log Out

Sam Spartan

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

Plan for Sam Spartan

Performance Plans must be completed annually by May 30. The Plan is comprised of three parts: Institutional goals, Individual goals and Talent Development Plan. Performance Plans must be approved by the next level supervisor prior to the Plan review meeting with the employee. Links to tools and resources can be found by visiting https://hrs.uncg.edu/Performance_Management/. (or simple click here)

- Review the Institutional Goals with the employee. The total weight of the Institutional Goals must equal 50%.
- Define the Individual Goals for the employee (no less than 3, no more than 5). The total weight of the Individual Goals must equal 50%.
- Indicate below the Weight of each goal toward the Final Overall Rating. Each goal must be at least 5%.
- Provide Talent Development Goals, as needed.

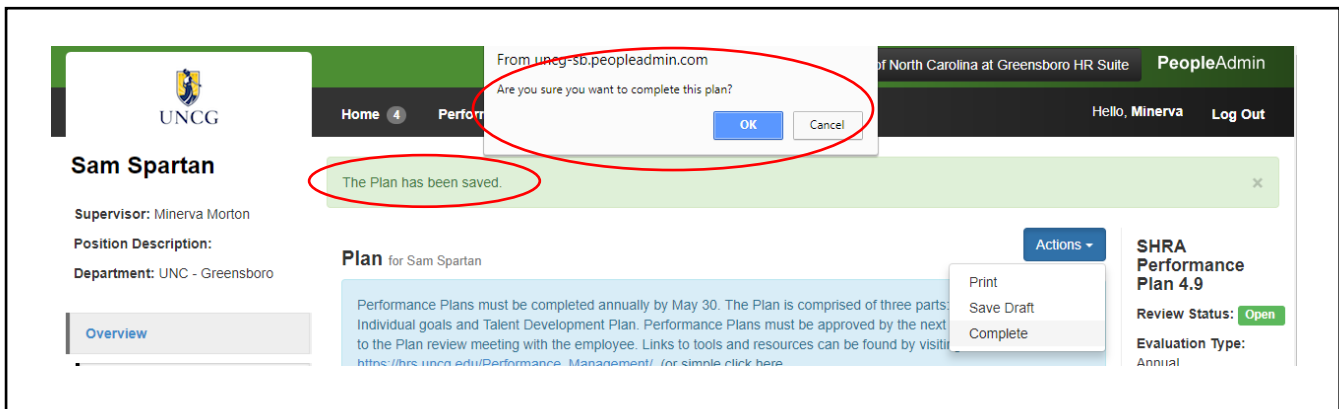
SHRA Performance Plan 4.9
Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 04/09/18 to -
Last Updated: April 09, 2018 16:55
Co-reviewer: Add Co-reviewer

Overview Plan Supervisor Evaluation History My Reviews My Employees' Reviews

Institutional Goals Individual Goals Talent Development Plan

If you fail to complete any of the required sections in the plan you will get an error message like the one circled above 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.

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.



UNCG Home Performance Progress Notes Hello, Minerva Log Out

Sam Spartan

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

Plan for Sam Spartan

Performance Plans must be completed annually by May 30. The Plan is comprised of three parts: Institutional goals, Individual goals and Talent Development Plan. Performance Plans must be approved by the next level supervisor prior to the Plan review meeting with the employee. Links to tools and resources can be found by visiting https://hrs.uncg.edu/Performance_Management/. (or simple click here)

SHRA Performance Plan 4.9
Review Status: **Open**
Evaluation Type: Annual

Overview

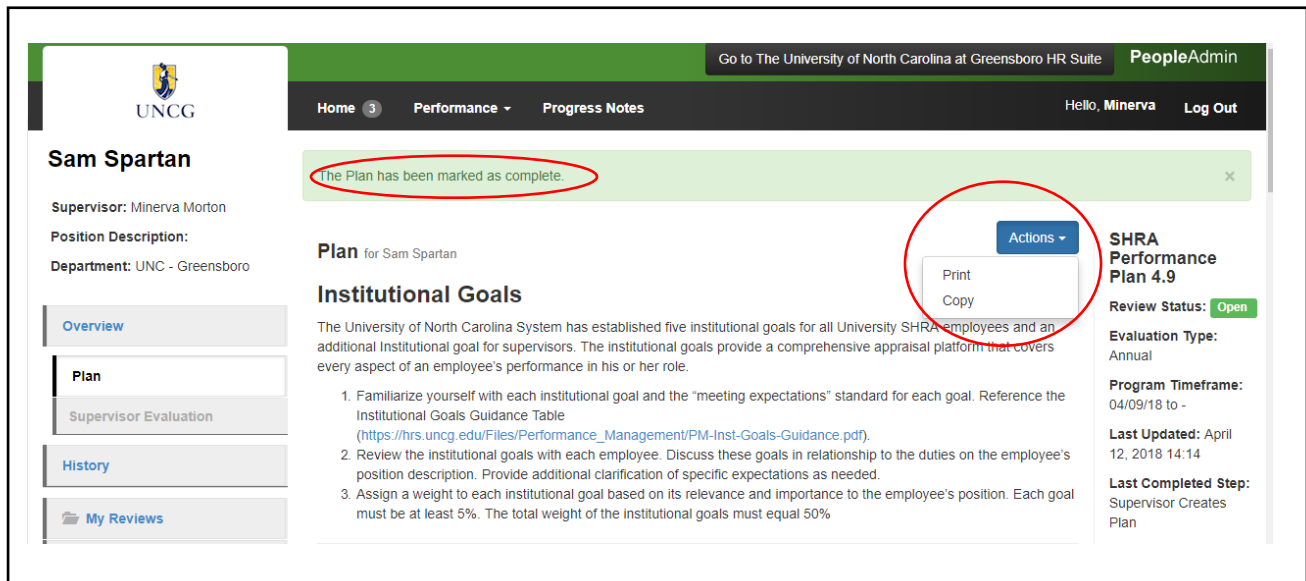
From uncg-sb.peopleadmin.com
Are you sure you want to complete this plan?
OK Cancel

The Plan has been saved.

Actions Print Save Draft Complete

If your plan goes through successfully, you will see the message that the plan has been saved at the top of your screen. And, 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 the same position 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 above, 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.

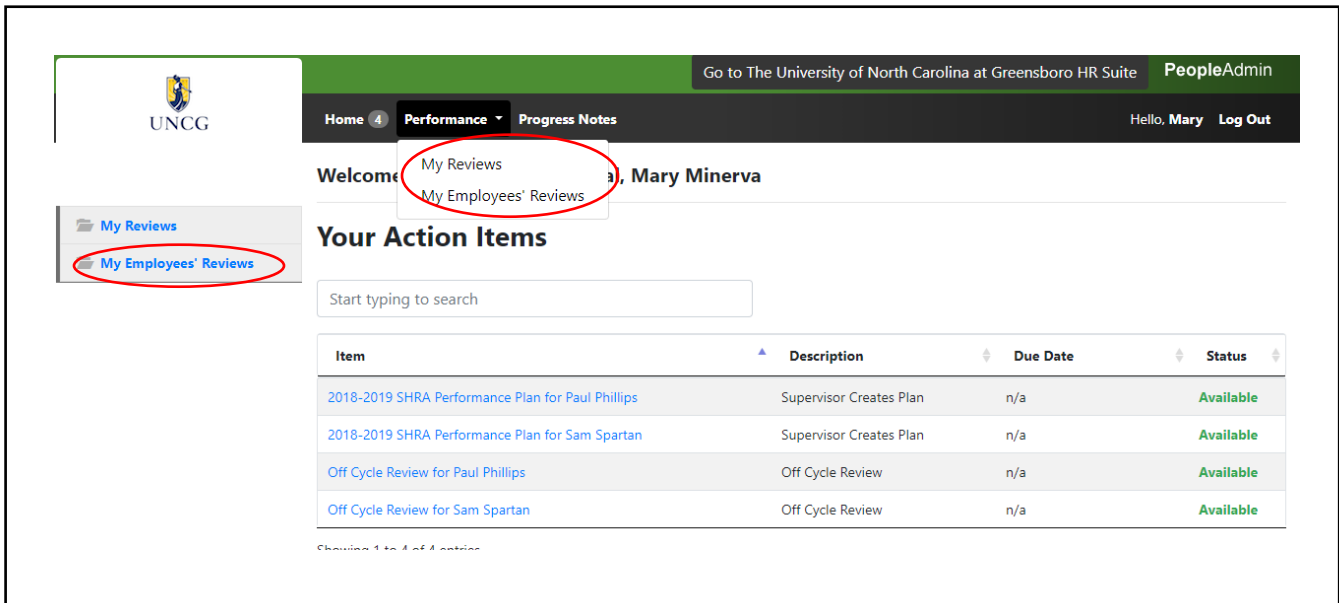
To copy a SHRA Performance Plan, log into SpartanTalent e-Performance Management (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.



Once logged in, click the **'Go to ePerformance'** link in the upper 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 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 Performance Progress Notes Hello, Mary Log Out

Welcome **Mary Minerva**

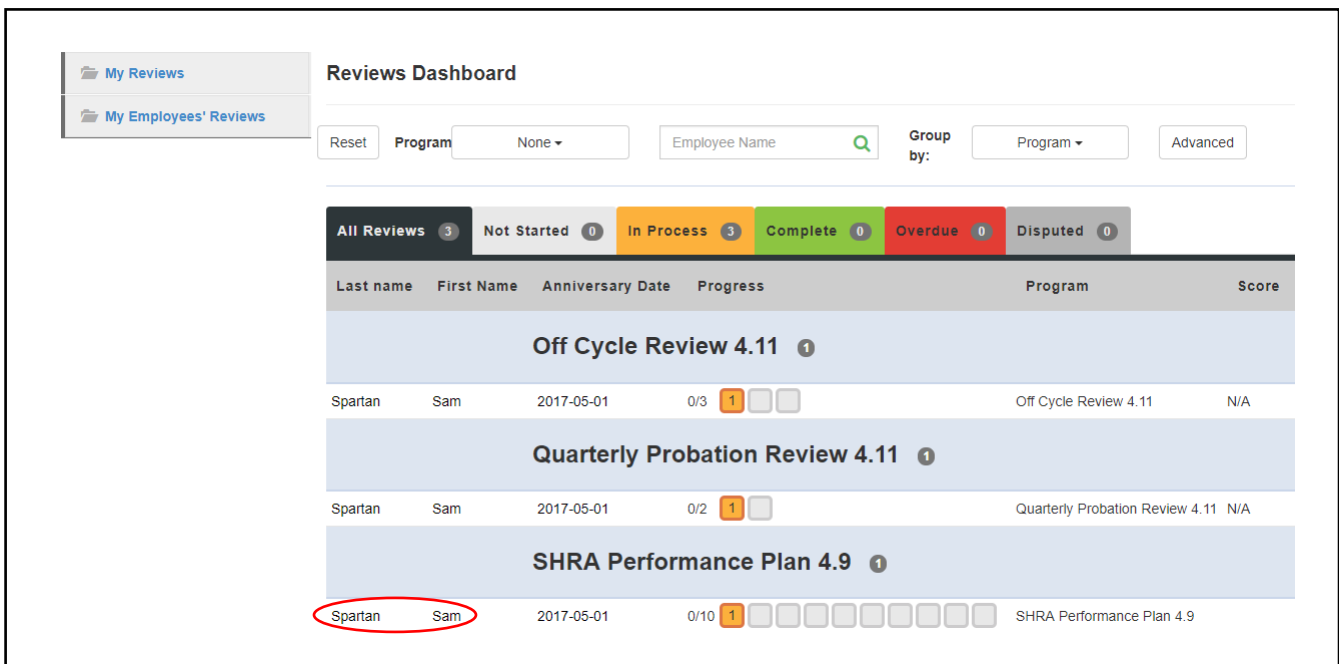
Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Supervisor Creates Plan	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	n/a	Available

Showing 1 to 4 of 4 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.



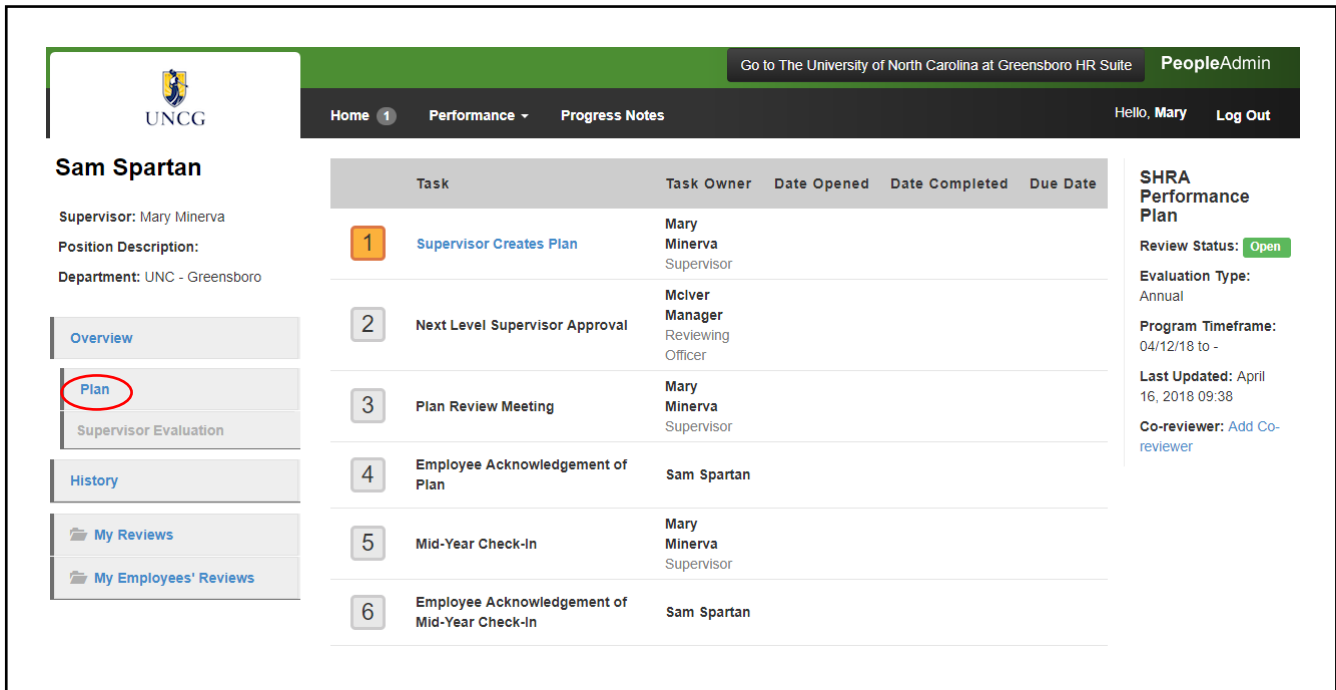
Reviews Dashboard

Reset Program None Employee Name Group by: 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
Off Cycle Review 4.11					
Spartan	Sam	2017-05-01	0/3 1	Off Cycle Review 4.11	N/A
Quarterly Probation Review 4.11					
Spartan	Sam	2017-05-01	0/2 1	Quarterly Probation Review 4.11	N/A
SHRA Performance Plan 4.9					
Spartan	Sam	2017-05-01	0/10 1	SHRA Performance Plan 4.9	

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.



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

Home 1 Performance Progress Notes Hello, Mary Log Out

Sam Spartan

Supervisor: Mary Minerva
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 Supervisor Creates Plan	Mary Minerva Supervisor			
2 Next Level Supervisor Approval	Mcliver Manager Reviewing Officer			
3 Plan Review Meeting	Mary Minerva Supervisor			
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			

SHRA Performance Plan

Review Status: **Open**

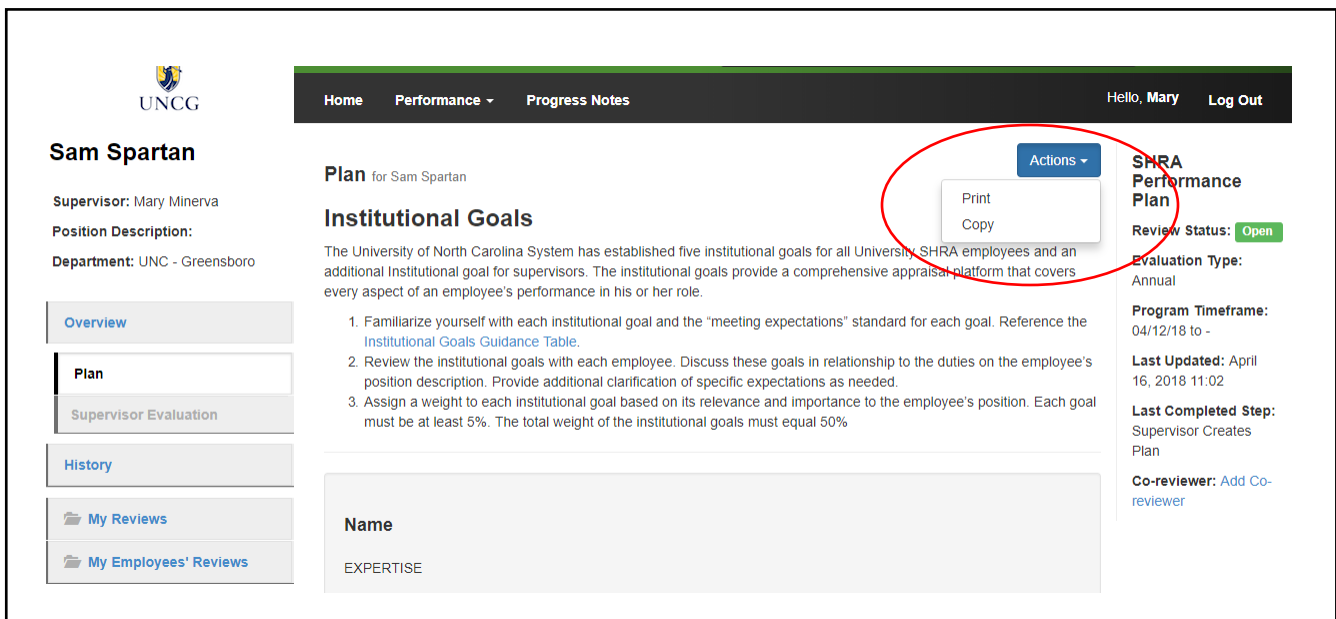
Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: April 16, 2018 09:38

Co-reviewer: Add Co-reviewer

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



Home Performance Progress Notes Hello, Mary Log Out

Sam Spartan

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

Overview
Plan
Supervisor Evaluation
History
My Reviews
My Employees' Reviews

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.
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%

Name
EXPERTISE

SHRA Performance Plan

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

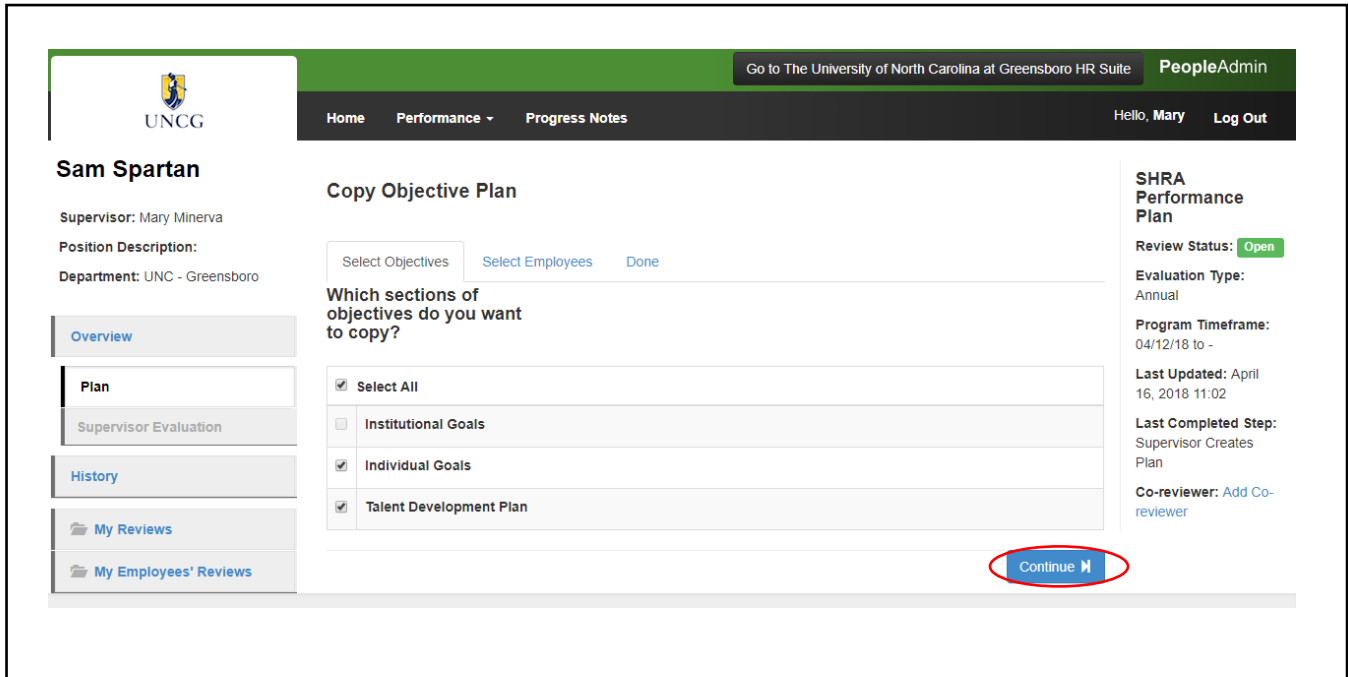
Last Updated: April 16, 2018 11:02

Last Completed Step: Supervisor Creates Plan

Co-reviewer: Add Co-reviewer

NOTE! Institutional Goals do not change from employee to employee. Only the weighting changes, goals will not be a selectable option for copy.

The screen below will appear. Select the performance components you want to copy (Individual goals, Talent Development Plan or hit ('Select All') then click the 'Continue' button.



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

Home Performance Progress Notes Hello, Mary Log Out

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

Overview
Plan
Supervisor Evaluation
History
My Reviews
My Employees' Reviews

Copy Objective Plan
Select Objectives Select Employees Done

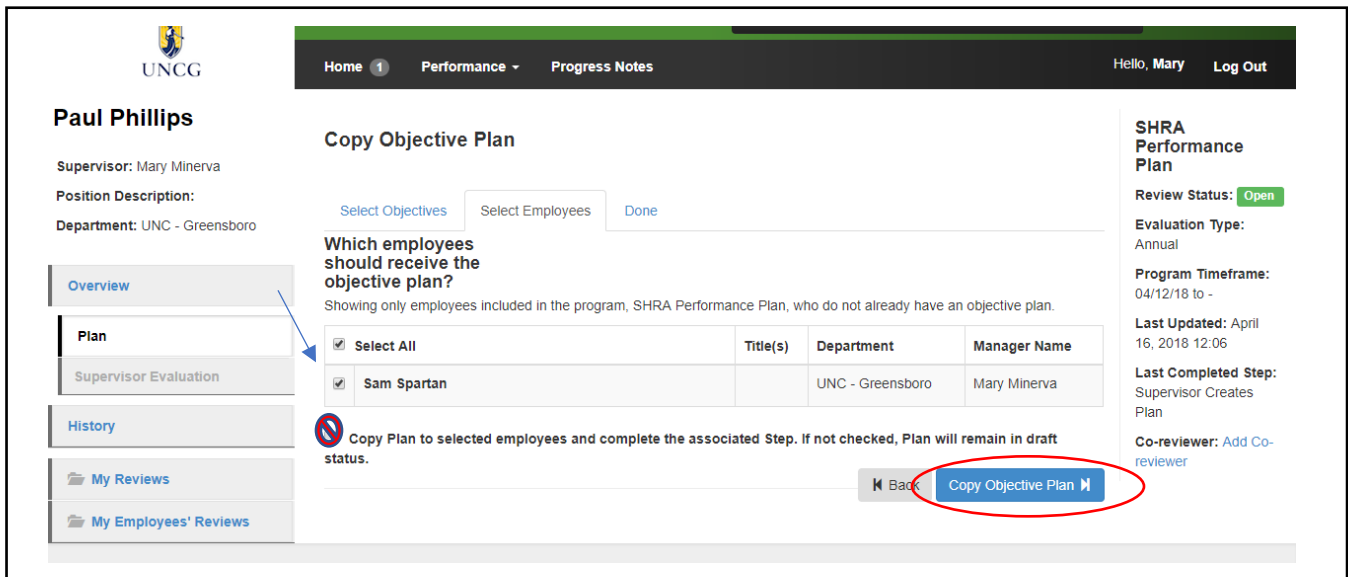
Which sections of objectives do you want to copy?

<input checked="" type="checkbox"/>	Select All
<input type="checkbox"/>	Institutional Goals
<input checked="" type="checkbox"/>	Individual Goals
<input checked="" type="checkbox"/>	Talent Development Plan

SHRA Performance Plan
Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 04/12/18 to -
Last Updated: April 16, 2018 11:02
Last Completed Step: Supervisor Creates Plan
Co-reviewer: Add Co-reviewer

Continue

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).



Home Performance Progress Notes Hello, Mary Log Out

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

Overview
Plan
Supervisor Evaluation
History
My Reviews
My Employees' Reviews

Copy Objective Plan
Select Objectives Select Employees Done

Which employees should receive the objective plan?
Showing only employees included in the program, SHRA Performance Plan, who do not already have an objective plan.

<input checked="" type="checkbox"/>	Select All	Title(s)	Department	Manager Name
<input checked="" type="checkbox"/>	Sam Spartan		UNC - Greensboro	Mary Minerva

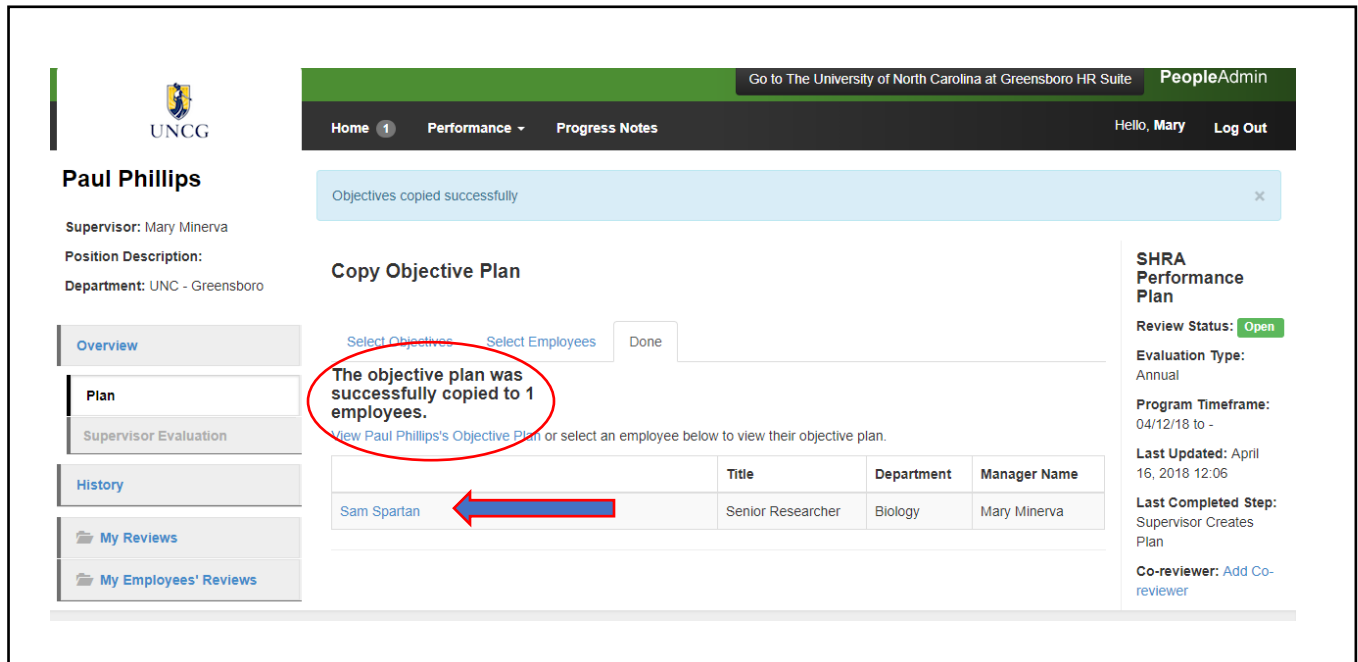
Copy Plan to selected employees and complete the associated Step. If not checked, Plan will remain in draft status.

Back Copy Objective Plan

SHRA Performance Plan
Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 04/12/18 to -
Last Updated: April 16, 2018 12:06
Last Completed Step: Supervisor Creates Plan
Co-reviewer: Add Co-reviewer

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.



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

Home 1 Performance Progress Notes Hello, Mary Log Out

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

Objectives copied successfully

Copy Objective Plan

Select Objectives Select Employees Done

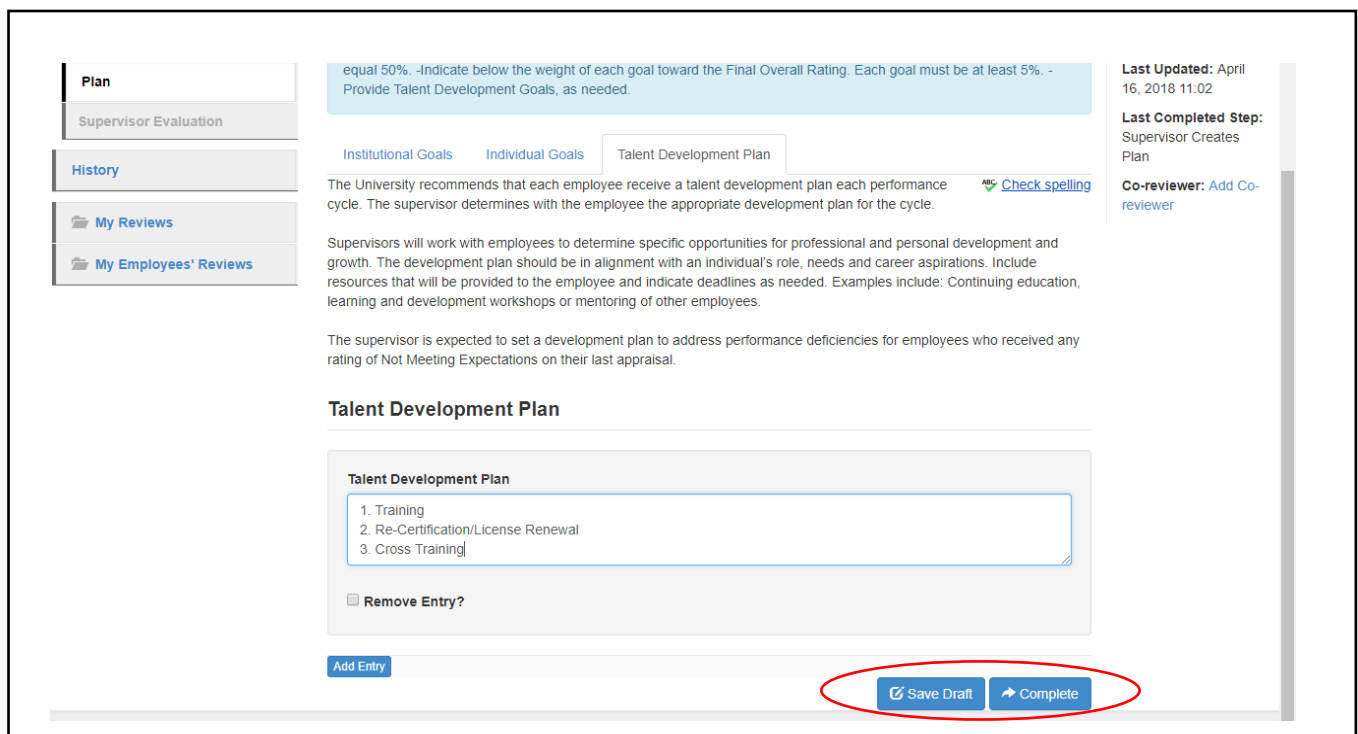
The objective plan was successfully copied to 1 employees.

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

	Title	Department	Manager Name
Sam Spartan	Senior Researcher	Biology	Mary Minerva

SHRA Performance Plan
Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 04/12/18 to -
Last Updated: April 16, 2018 12:06
Last Completed Step: Supervisor Creates Plan
Co-reviewer: Add Co-reviewer

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.



Plan
Supervisor Evaluation
History
My Reviews
My Employees' Reviews

equal 50%. -Indicate below the weight of each goal toward the Final Overall Rating. Each goal must be at least 5%. - Provide Talent Development Goals, as needed.

Institutional Goals Individual Goals Talent Development Plan

The University recommends that each employee receive a talent development plan each performance cycle. The supervisor determines with the employee the appropriate development plan for the cycle. [Check spelling](#)

Supervisors will work with employees to determine specific opportunities for professional and personal development and growth. The development plan should be in alignment with an individual's role, needs and career aspirations. Include resources that will be provided to the employee and indicate deadlines as needed. Examples include: Continuing education, learning and development workshops or mentoring of other employees.

The supervisor is expected to set a development plan to address performance deficiencies for employees who received any rating of Not Meeting Expectations on their last appraisal.

Talent Development Plan

Talent Development Plan

1. Training
2. Re-Certification/License Renewal
3. Cross Training

Remove Entry?

Add Entry

Save Draft Complete

When you are satisfied with the plan click the **‘Complete’** button on the **‘Talent Development Plan’** tab. This will send the plan to the Next-Level Supervisor for review.

Next-Level Supervisor Approves Performance Plan



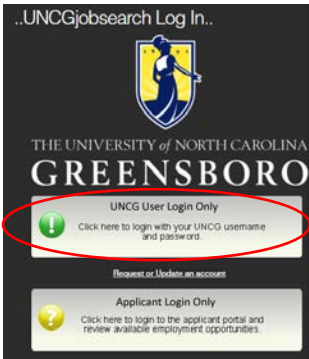
2


Next Level Supervisor Approval

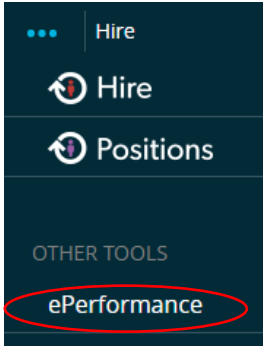
McIver
Manager
Reviewing
Officer

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





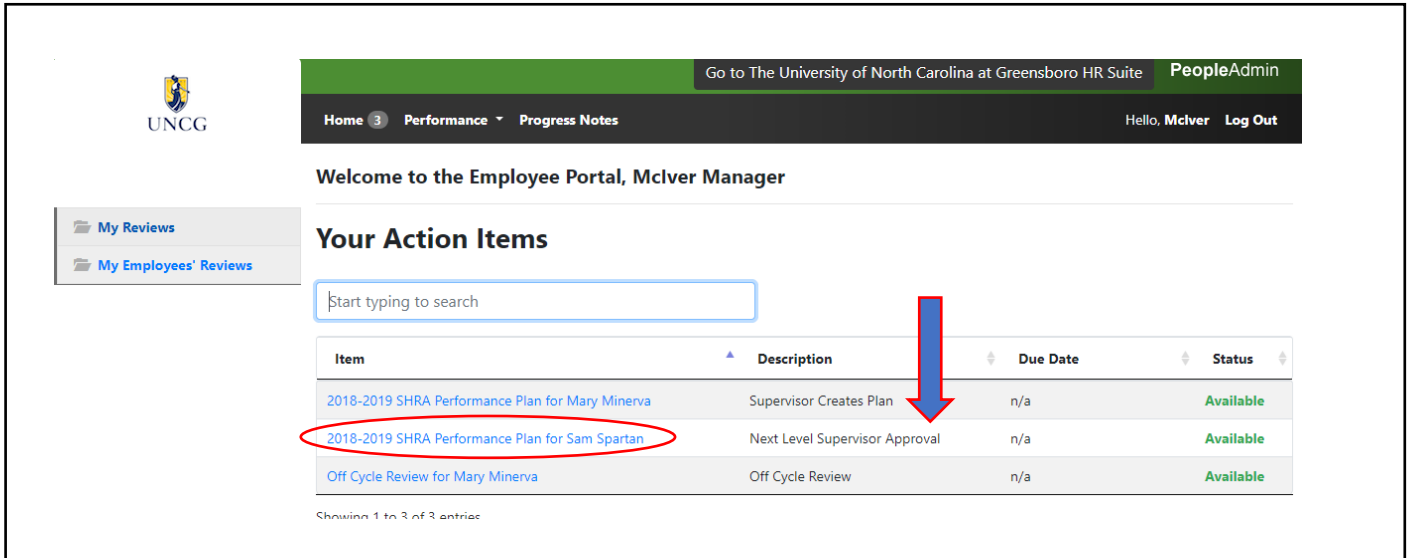


Once logged in, click the **‘Go to ePerformance’** link in the upper left-hand corner of your page

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 review the Performance Plan drafted by the Supervisor, select the description title that reads **'Next Level Supervisor Approves Performance Plan'**.



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

Home 3 Performance ▾ Progress Notes Hello, Mclver Log Out

Welcome to the Employee Portal, Mclver Manager

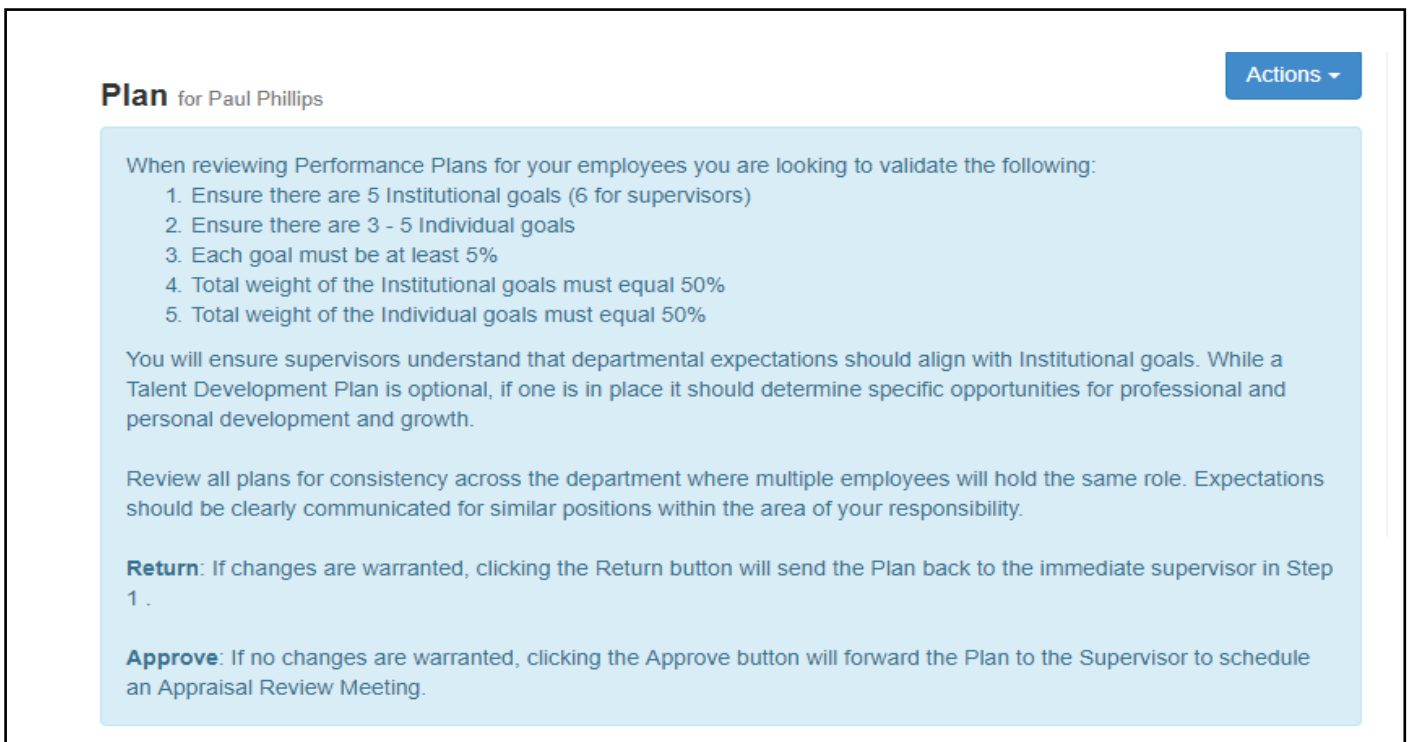
Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Mary Minerva	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Next Level Supervisor Approval	n/a	Available
Off Cycle Review for Mary Minerva	Off Cycle Review	n/a	Available

Showing 1 to 3 of 3 entries

Review the Performance Plan for accuracy and consistency. (Note: The Next-Level Supervisor should ensure that there is consistency in goals across similar positions and that the individual goals directly or indirectly relate to the unit's strategic goals in the current cycle.)



Plan for Paul Phillips Actions ▾

When reviewing Performance Plans for your employees you are looking to validate the following:

1. Ensure there are 5 Institutional goals (6 for supervisors)
2. Ensure there are 3 - 5 Individual goals
3. Each goal must be at least 5%
4. Total weight of the Institutional goals must equal 50%
5. Total weight of the Individual goals must equal 50%

You will ensure supervisors understand that departmental expectations should align with Institutional goals. While a Talent Development Plan is optional, if one is in place it should determine specific opportunities for professional and personal development and growth.

Review all plans for consistency across the department where multiple employees will hold the same role. Expectations should be clearly communicated for similar positions within the area of your responsibility.

Return: If changes are warranted, clicking the Return button will send the Plan back to the immediate supervisor in Step 1 .

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

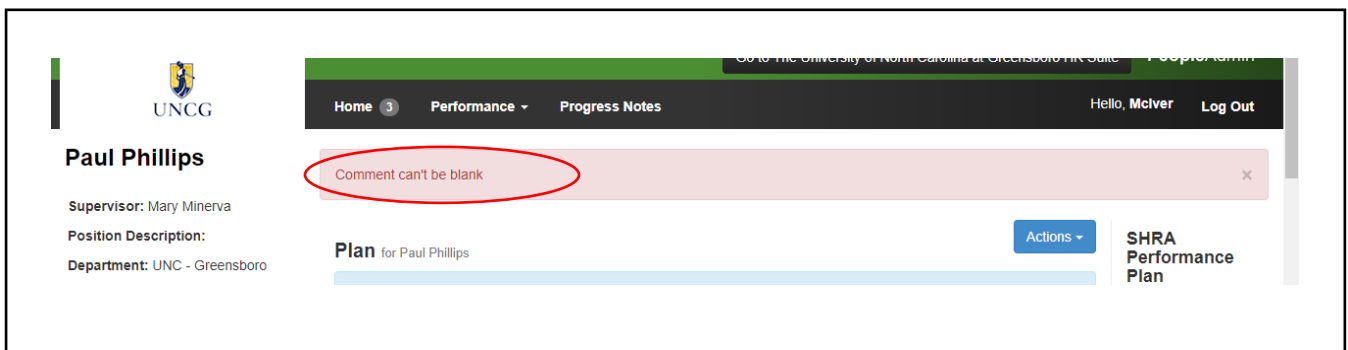
When you get to the bottom of the page you can choose to **'Approve'** the Plan or **'Return'** it to the Supervisor for revision. If it is necessary to return the Performance Plan back to the Supervisor, you must enter your instructions into the comments box at the bottom of the form prior to returning it.



Comment ABC [Check spelling](#)

Return
Approve

If you attempt to 'Return' the action without writing a comment in the box, you will see the following:



UNCG

Home Performance Progress Notes Hello, McIver Log Out

Paul Phillips

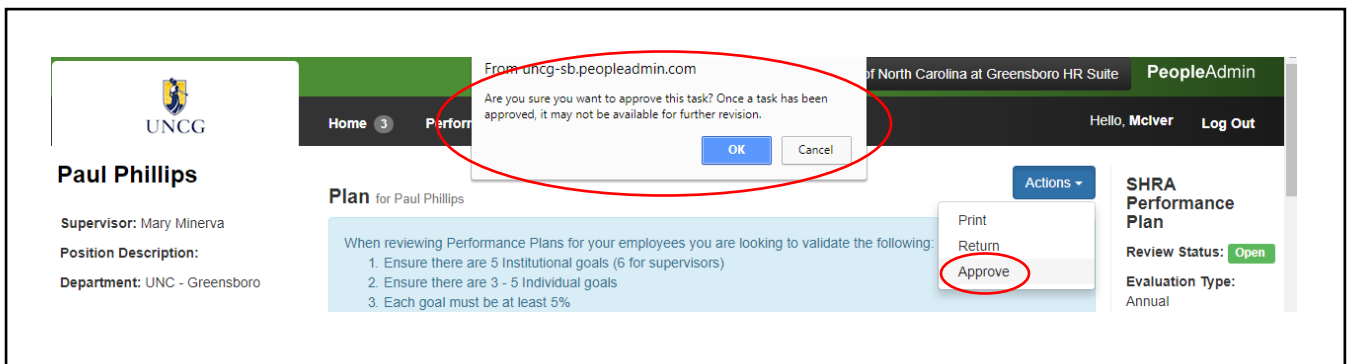
Supervisor: Mary Minerva
Position Description:
Department: UNC - Greensboro

Comment can't be blank

Plan for Paul Phillips Actions

SHRA Performance Plan

When you click the 'Approve' 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 approving the plan creation. If you complete the action before you are done approving the plan, the action can only be re-opened by a HR administrator.



UNCG

Home Performance Progress Notes Hello, McIver Log Out

Paul Phillips

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

Plan for Paul Phillips

From uncg-sb.peopleadmin.com
 Are you sure you want to approve this task? Once a task has been approved, it may not be available for further revision.
OK Cancel

When reviewing Performance Plans for your employees you are looking to validate the following:

1. Ensure there are 5 Institutional goals (6 for supervisors)
2. Ensure there are 3 - 5 Individual goals
3. Each goal must be at least 5%

Actions

- Print
- Return
- Approve

SHRA Performance Plan

Review Status: Open

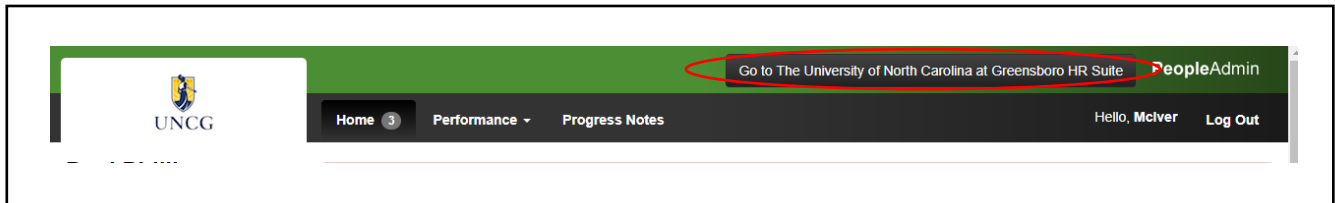
Evaluation Type: Annual

Comment [Check spelling](#)

Return Approve

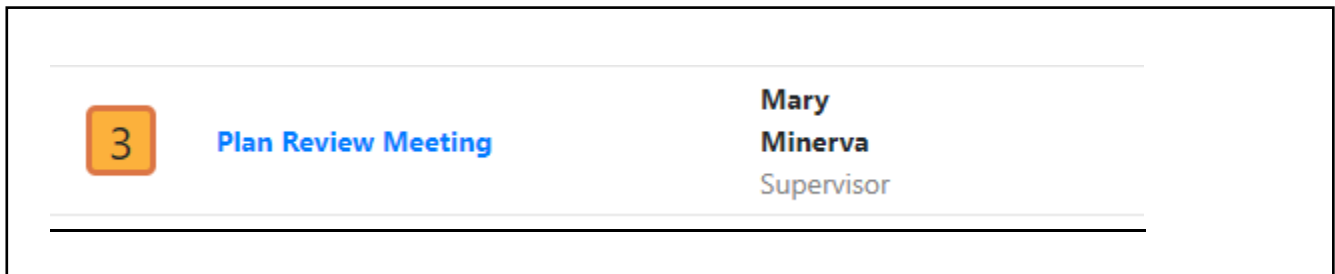
Once you have received a Performance Plan that you agree with, you will **'Approve'** the action and it will go back to the Supervisor to prepare for their Performance Plan Meeting with their employee.

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.



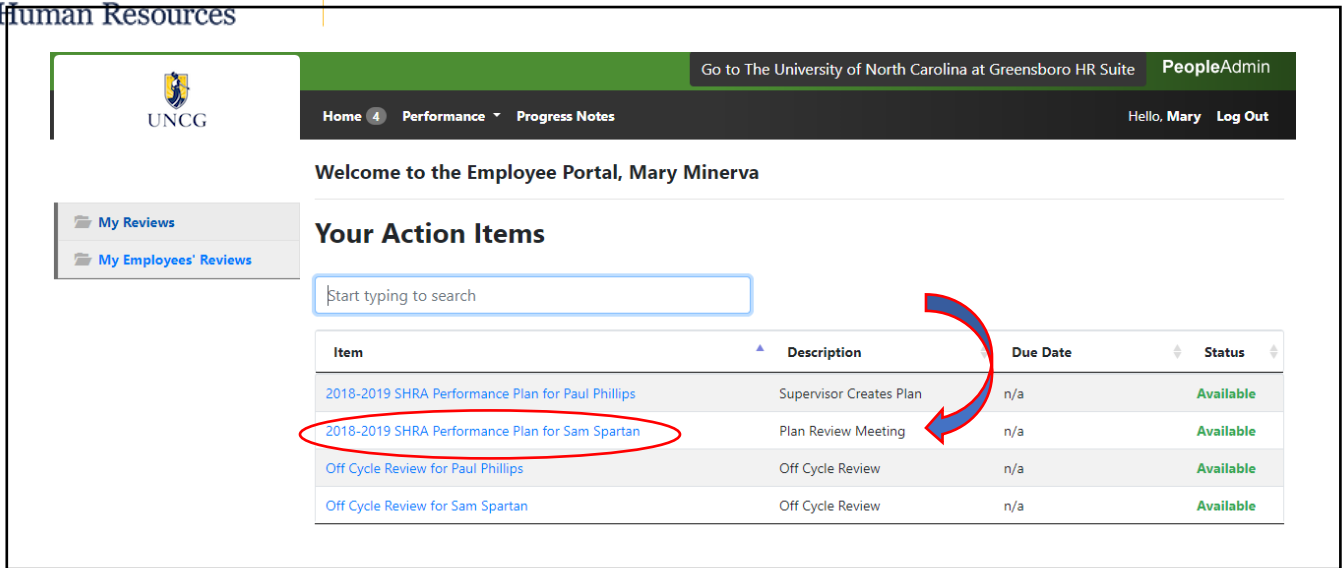
The screenshot shows the top navigation bar of the PeopleAdmin system. On the left is the UNCG logo. The main navigation menu includes 'Home', 'Performance', and 'Progress Notes'. On the right, it says 'Hello, McIver' and 'Log Out'. A red oval highlights the link 'Go to The University of North Carolina at Greensboro HR Suite'.

Completing the Supervisor/Employee Performance Plan Meeting



The screenshot shows a notification card for a 'Plan Review Meeting'. On the left, there is an orange square with the number '3'. The text reads 'Plan Review Meeting' in blue. On the right, the name 'Mary Minerva' is displayed in bold, with 'Supervisor' below it in a lighter font.

Once the Next-Level Supervisor has 'Approved' 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 HR Suite **PeopleAdmin**

Home 4 Performance Progress Notes Hello, Mary Log Out

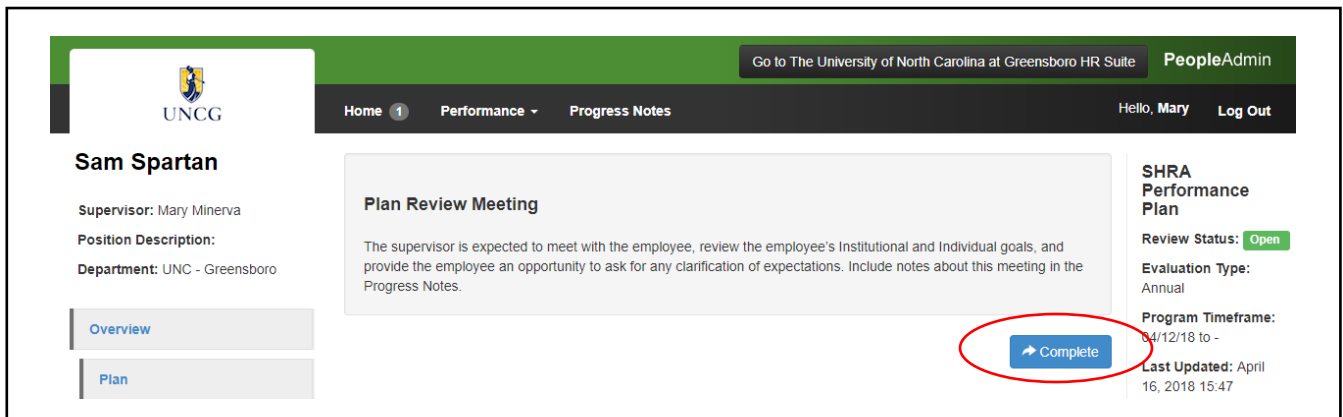
Welcome to the Employee Portal, Mary Minerva

Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Plan Review Meeting	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	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 HR Suite **PeopleAdmin**

Home 1 Performance Progress Notes Hello, Mary Log Out

Sam Spartan

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

Overview
Plan

Plan Review Meeting

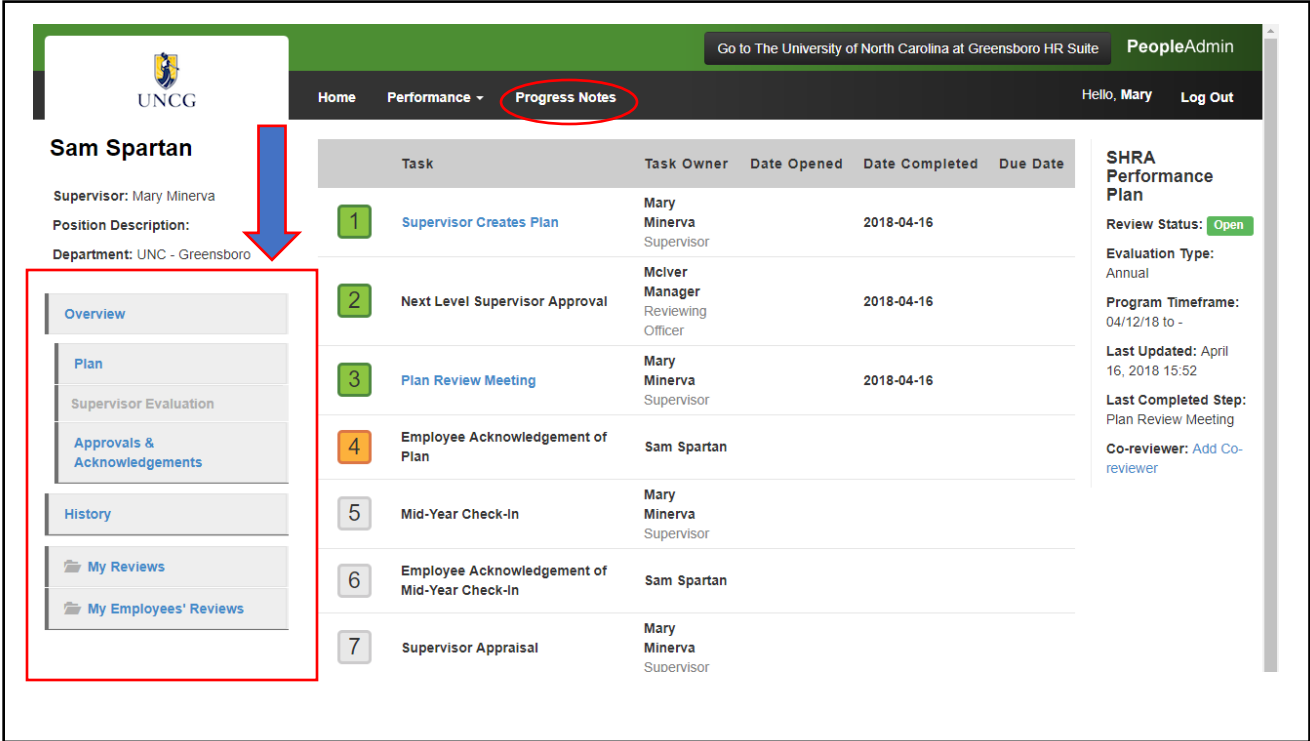
The supervisor is expected to meet with the employee, review the employee's Institutional and Individual goals, and provide the employee an opportunity to ask for any clarification of expectations. Include notes about this meeting in the Progress Notes.

SHRA Performance Plan

Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 04/12/18 to -
Last Updated: April 16, 2018 15:47

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.



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

Home Performance **Progress Notes** Hello, Mary Log Out

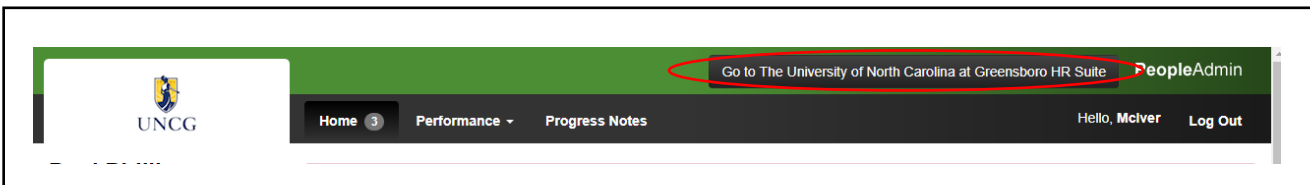
Sam Spartan
 Supervisor: Mary Minerva
 Position Description:
 Department: UNC - Greensboro

SHRA Performance Plan
 Review Status: **Open**
 Evaluation Type: Annual
 Program Timeframe: 04/12/18 to -
 Last Updated: April 16, 2018 15:52
 Last Completed Step: Plan Review Meeting
 Co-reviewer: Add Co-reviewer

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		2018-04-16	
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			

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

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

Mid-Year Check-In

	<p>Mid-Year Check-In</p>	<p>Mary Minerva Supervisor</p>
---	---------------------------------	---

The purpose of the Mid-Year Check-In is to provide feedback to your employee on their performance at the mid-year mark (by October 31). Supervisors are required to conduct this required six-month follow-up to discuss goals, assess progress and resources, and, if needed, clarify or redefine expectations for remainder of cycle.

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

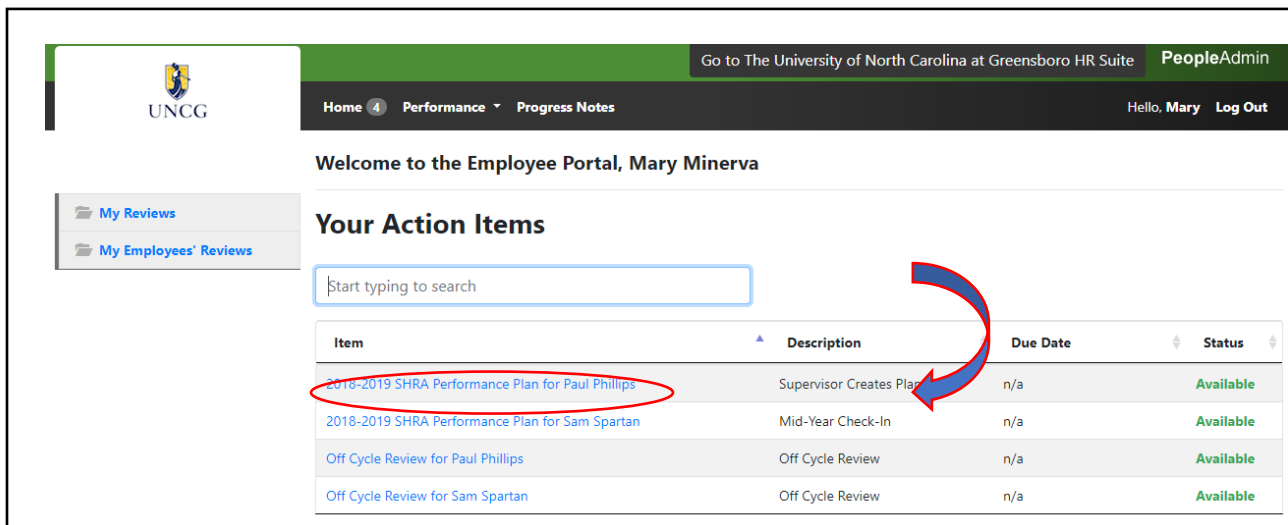


Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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 review the Performance Plan drafted by the Supervisor, select the description title that reads **'Mid-Year Check-In'**.

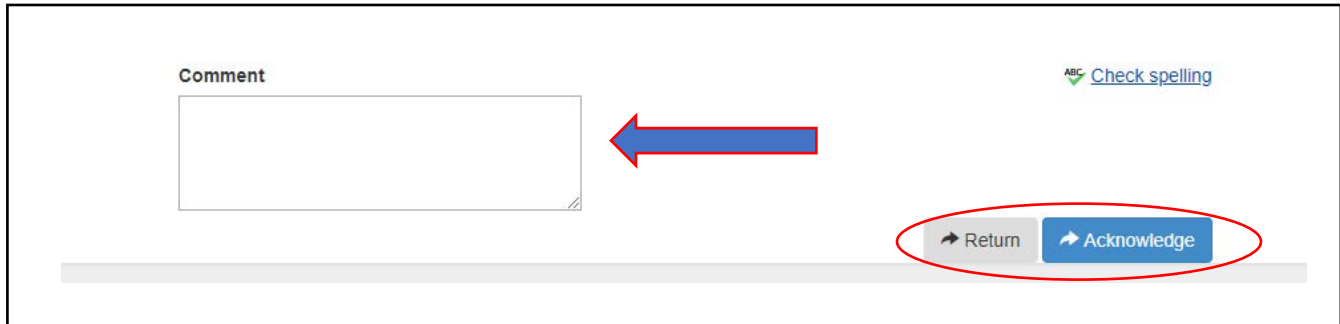


Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Mid-Year Check-In	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	n/a	Available

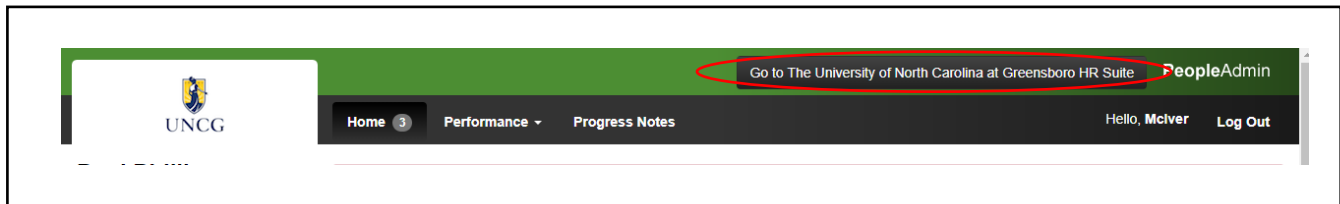
Once selected, use the comment section at the bottom of the page to assess the employees progress as “Meeting Expectations” feedback outlined in the performance plan.

Return: If changes are warranted to the Plan, clicking the Return button will send you back to Step 1 to re-create the Performance Plan.

Acknowledge: If no changes are warranted, clicking the Acknowledge button will forward the Mid-Year check-in to the employee for acknowledgement.



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 Performance Plan

If you need to update or correct information in your employee’s Performance Plan, but it has already been approved by the Next-Level Supervisor, contact Jennifer Feth at jmfeth@uncg.edu or Ext. 44508 to request that the action be put back into your queue for revision. You will see the ‘**Supervisor Creates Plan**’ appear back in your ‘**Action Items**’ when you enter the employee portal.

When it has been put back into your queue, use the ‘**Supervisor Creates Plan**’ process steps to revise and complete the Performance Plan.

When you finish revising the plan, 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.

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).

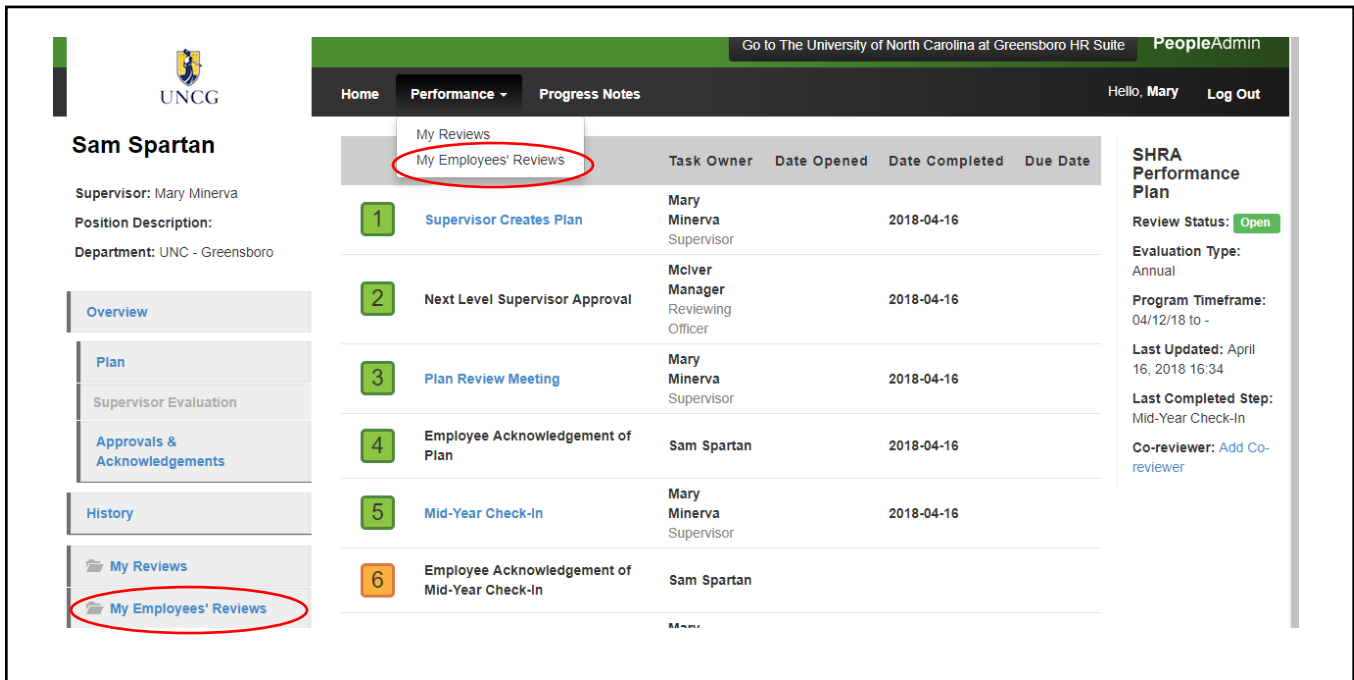
To add Progress Notes, log into SpartanTalent ePerformance Management at (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.



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.

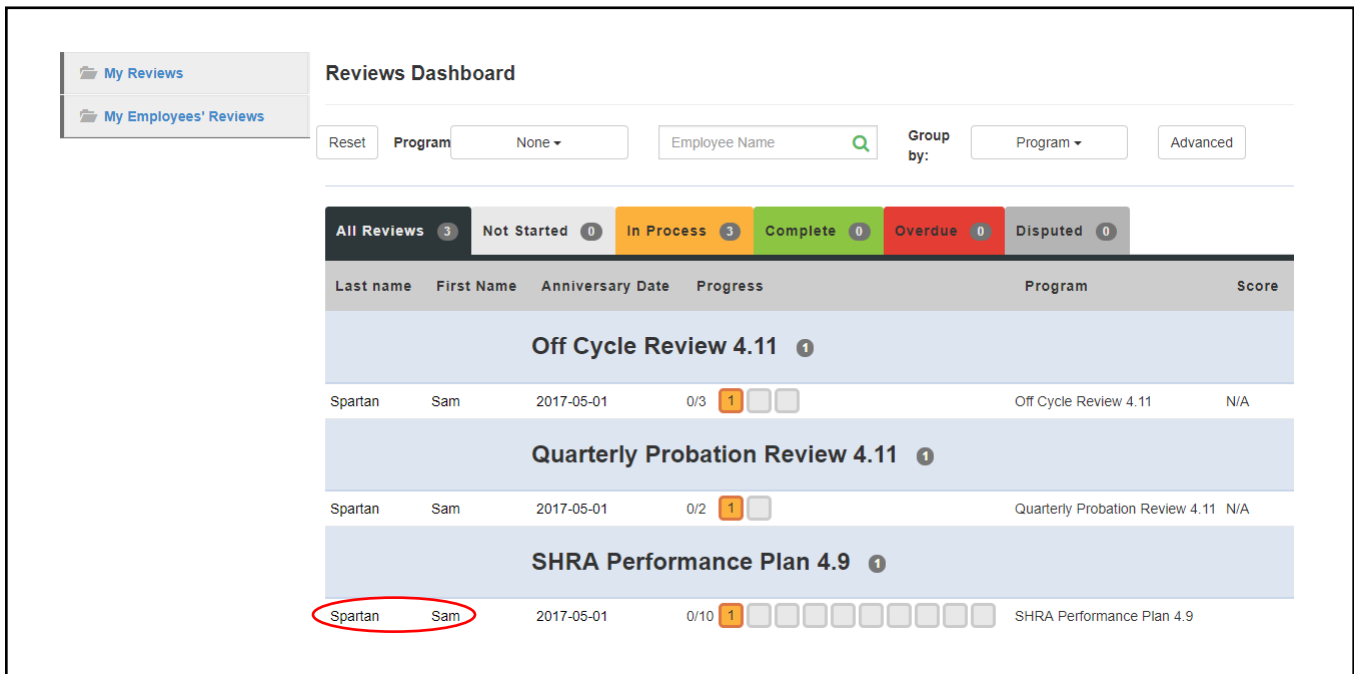
To locate a specific employee, click the 'My Employee Reviews' link on the left navigation or by using the 'Performance' dropdown.



The screenshot shows the PeopleAdmin interface for Sam Spartan. The left navigation menu has 'My Employees' Reviews' highlighted with a red circle. The 'Performance' dropdown menu is open, also with 'My Employees' Reviews' highlighted. The main content area shows a table of reviews for Sam Spartan, with columns for Task Owner, Date Opened, Date Completed, and Due Date. The table lists six review items, each with a numbered icon and a description.

	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		2018-04-16	
4 Employee Acknowledgement of Plan	Sam Spartan		2018-04-16	
5 Mid-Year Check-In	Mary Minerva Supervisor		2018-04-16	
6 Employee Acknowledgement of Mid-Year Check-In	Sam Spartan			

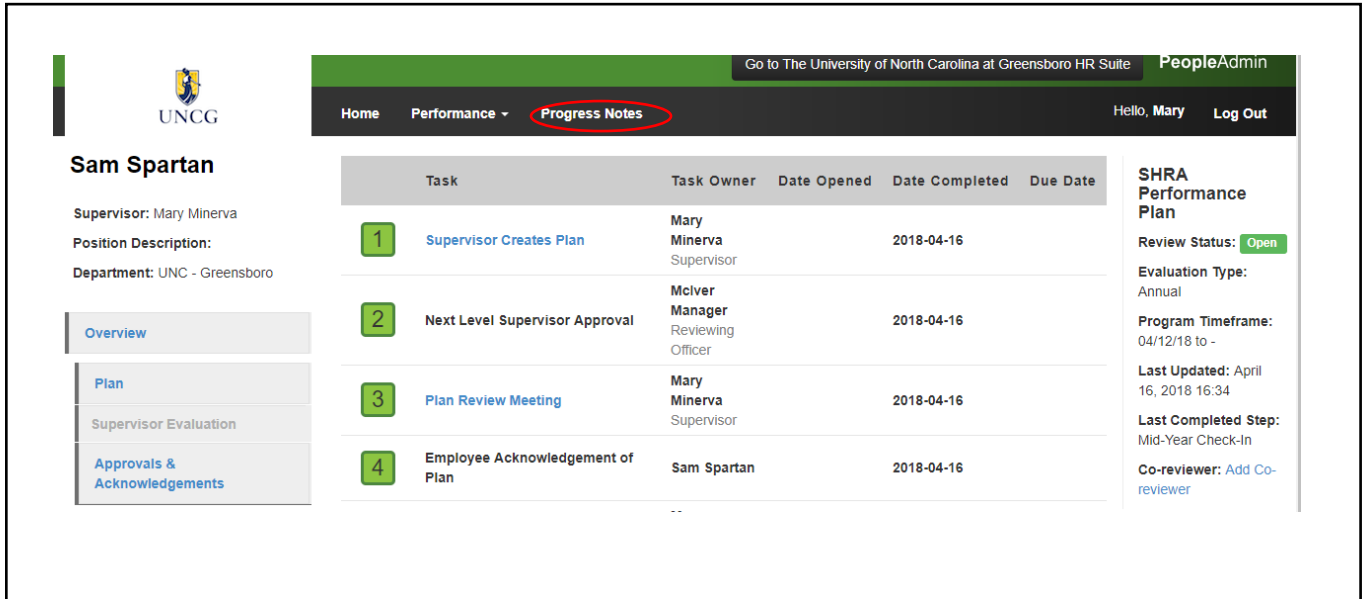
The following screen will appear for you to locate the specific employee of interest and the associated program you would like to view. Click the employee's name to access the program.



The screenshot shows the 'Reviews Dashboard' with search filters and a table of reviews. The 'Employee Name' field is set to 'Spartan' and is circled in red. The table lists three review programs: 'Off Cycle Review 4.11', 'Quarterly Probation Review 4.11', and 'SHRA Performance Plan 4.9'. Each row shows the employee's name, first name, anniversary date, progress status, and score.

Last name	First Name	Anniversary Date	Progress	Program	Score
Off Cycle Review 4.11					
Spartan	Sam	2017-05-01	0/3	Off Cycle Review 4.11	N/A
Quarterly Probation Review 4.11					
Spartan	Sam	2017-05-01	0/2	Quarterly Probation Review 4.11	N/A
SHRA Performance Plan 4.9					
Spartan	Sam	2017-05-01	0/10	SHRA Performance Plan 4.9	

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 HR Suite **PeopleAdmin**

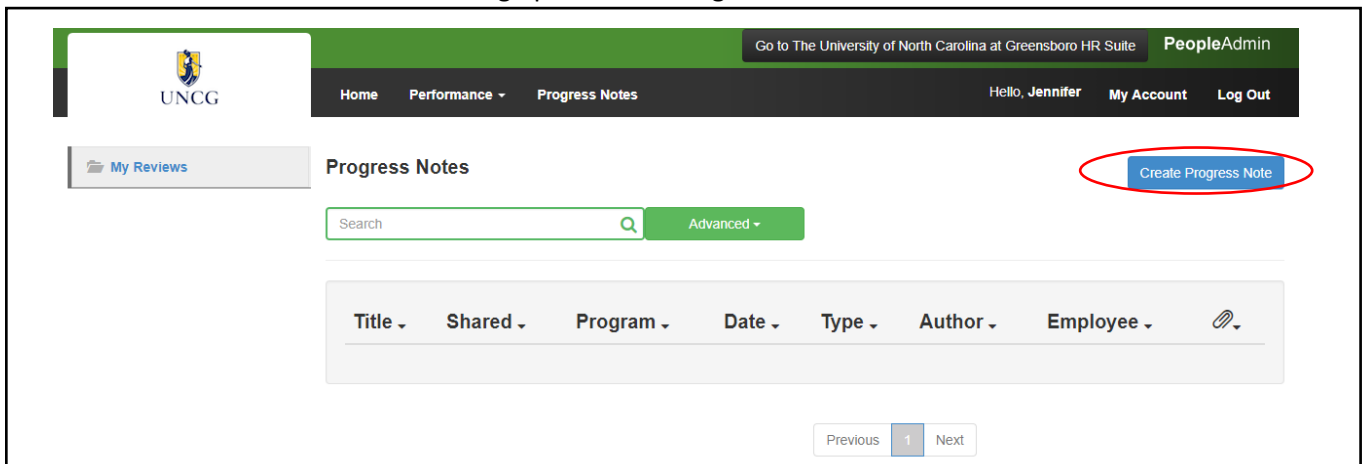
Home Performance **Progress Notes** Hello, Mary Log Out

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

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		2018-04-16	
4 Employee Acknowledgement of Plan	Sam Spartan		2018-04-16	

SHRA Performance Plan
 Review Status: **Open**
 Evaluation Type: Annual
 Program Timeframe: 04/12/18 to -
 Last Updated: April 16, 2018 16:34
 Last Completed Step: Mid-Year Check-In
 Co-reviewer: [Add Co-reviewer](#)

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 HR Suite **PeopleAdmin**

Home Performance **Progress Notes** Hello, Jennifer My Account Log Out

Progress Notes [Create Progress Note](#)

Search

Title	Shared	Program	Date	Type	Author	Employee	

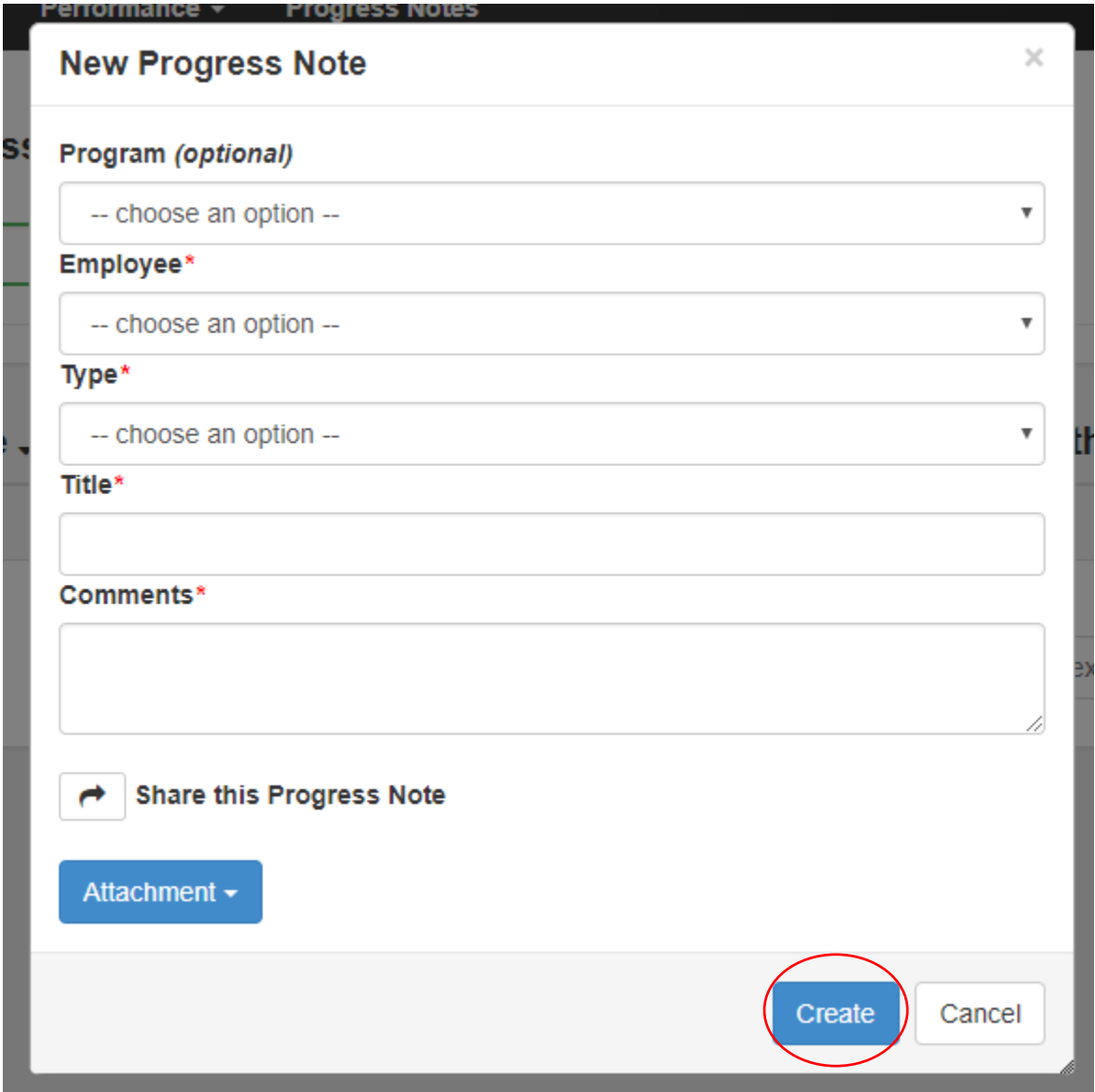
Previous 1 Next

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]

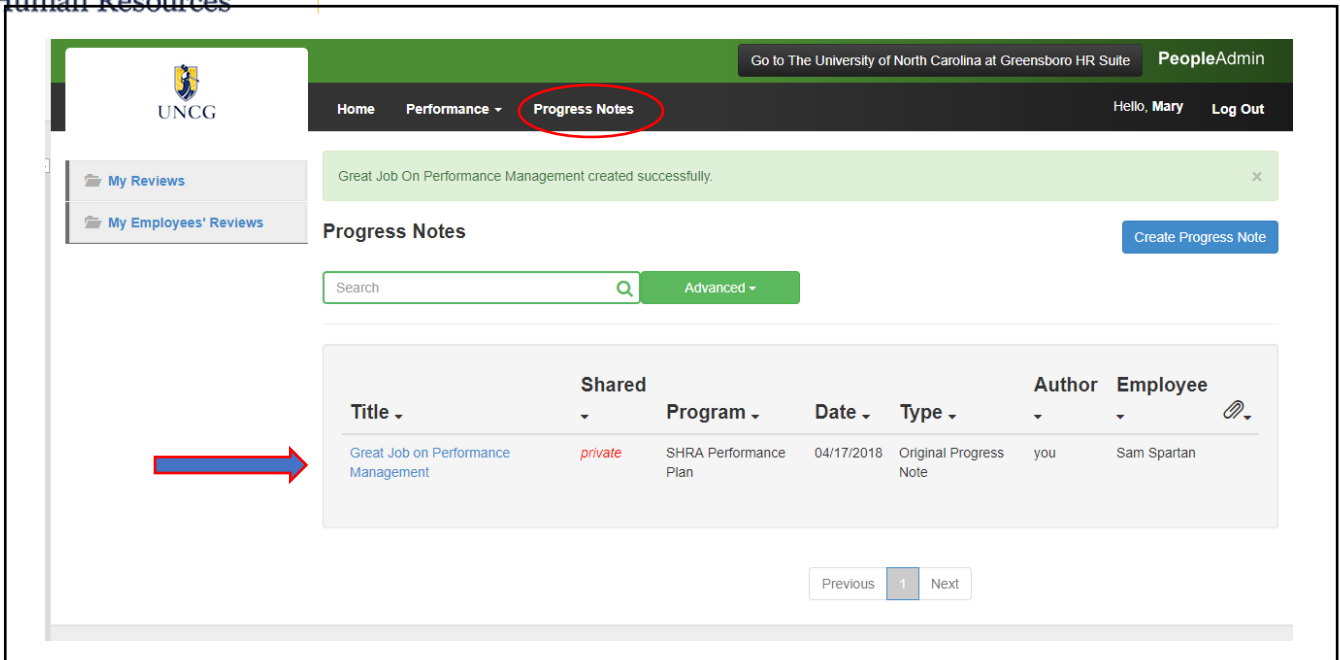
Comments*
[Text Area]

 **Share 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 HR Suite **PeopleAdmin**

Home Performance **Progress Notes** Hello, Mary Log Out

Great Job On Performance Management created successfully.

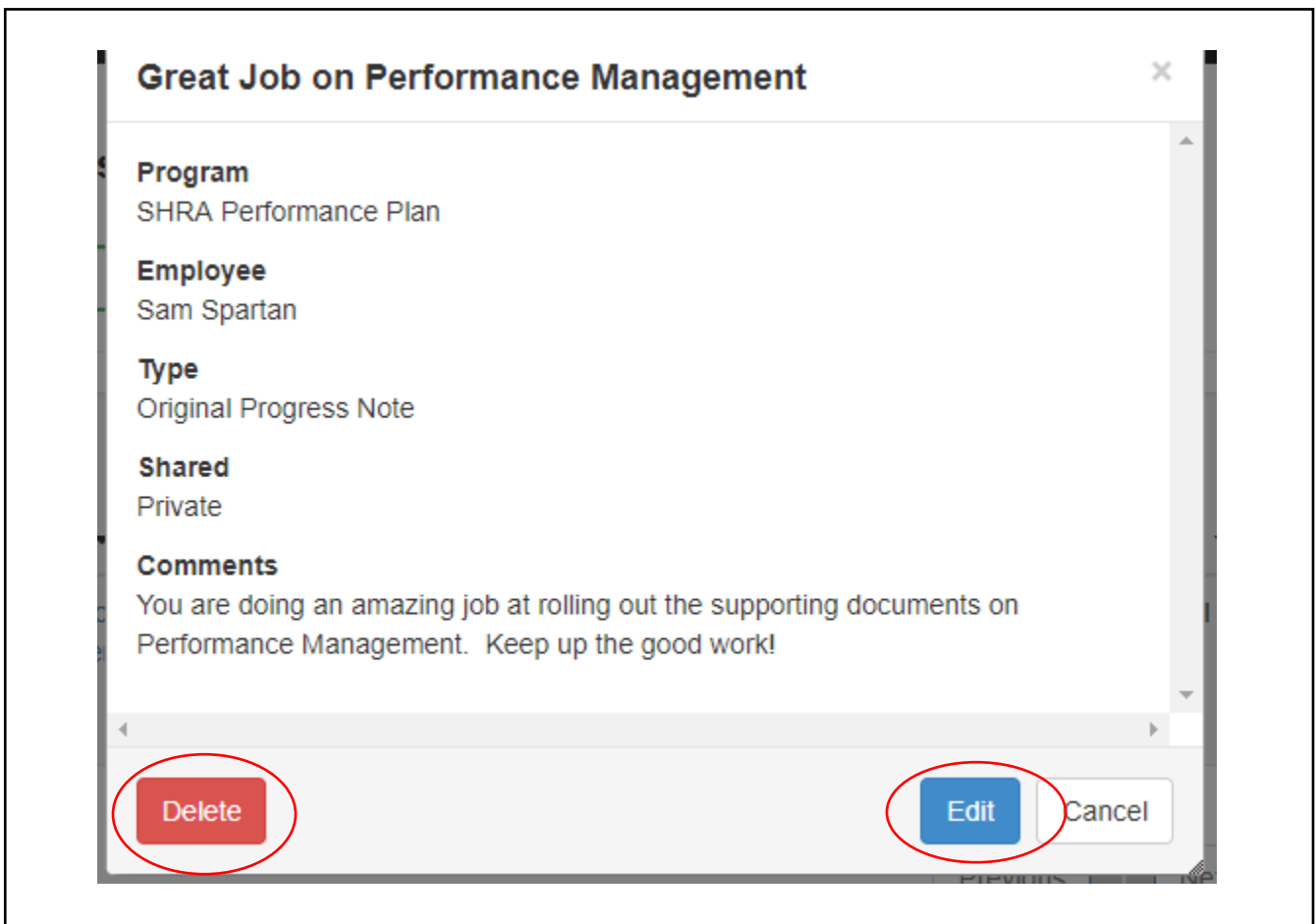
Progress Notes [Create Progress Note](#)

Search [Advanced](#)

Title	Shared	Program	Date	Type	Author	Employee
Great Job on Performance Management	private	SHRA Performance Plan	04/17/2018	Original Progress Note	you	Sam Spartan

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.



Great Job on Performance Management

Program
SHRA Performance Plan

Employee
Sam Spartan

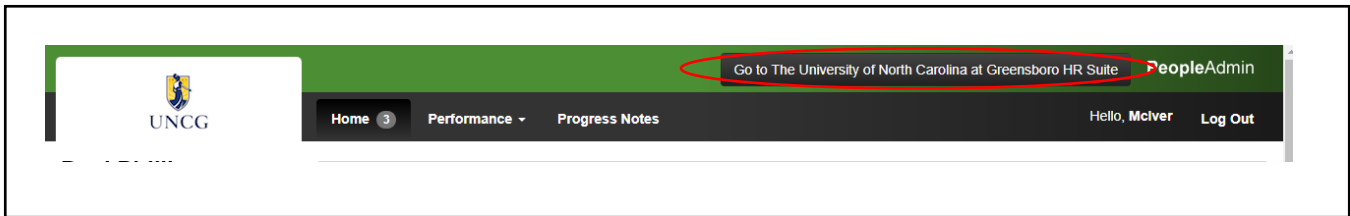
Type
Original Progress Note

Shared
Private

Comments
You are doing an amazing job at rolling out the supporting documents on Performance Management. Keep up the good work!

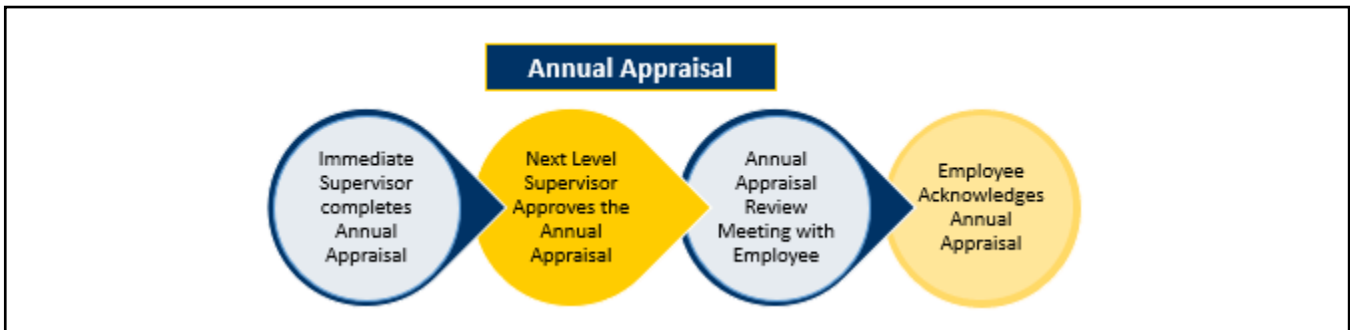
[Delete](#) [Edit](#) [Cancel](#)

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.

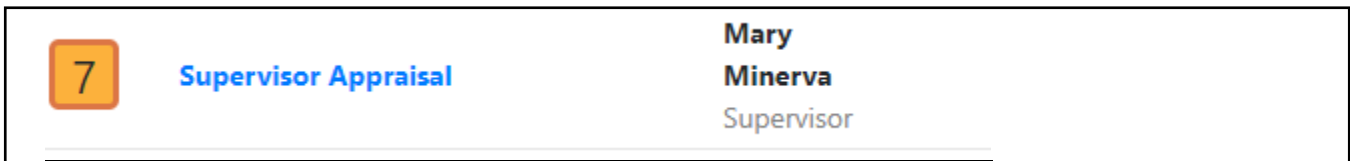


Annual Review Process Steps for Supervisors

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



Supervisor Appraisal



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

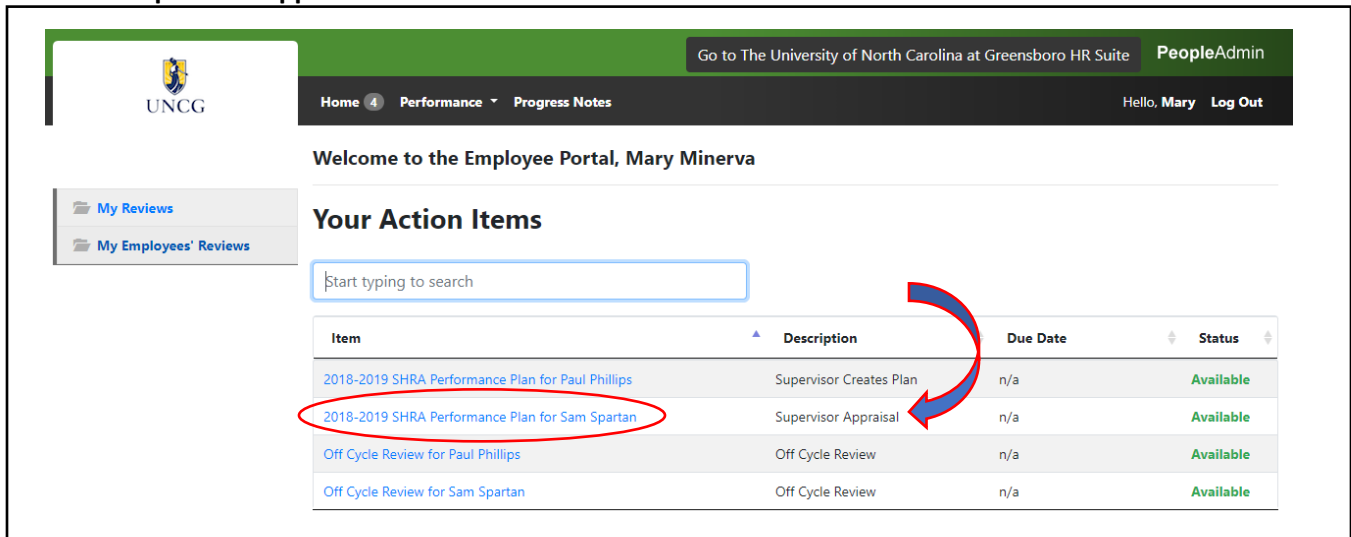


Once logged in, click the ‘Go to ePerformance’ link in the upper left-hand corner of your page

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 HR Suite **PeopleAdmin**

Home Performance Progress Notes Hello, Mary Log Out

Welcome to the Employee Portal, Mary Minerva

Your Action Items

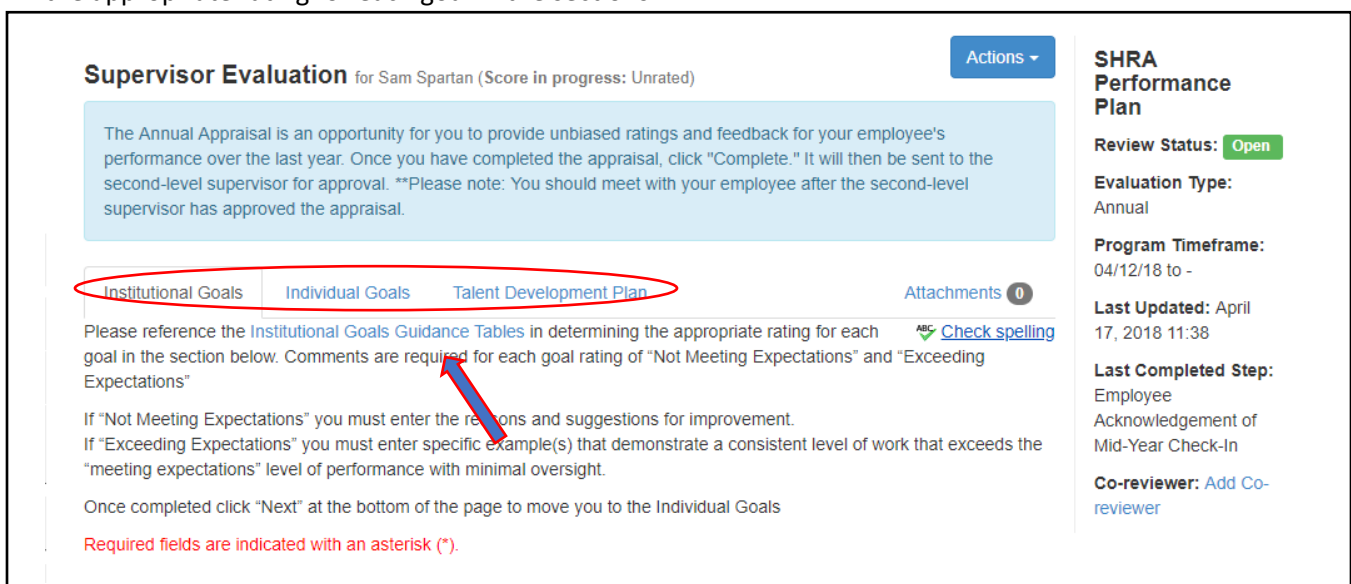
Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Supervisor Appraisal	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	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 **'Institutional Goals'** the second tab is **'Individual Goals'** and the last tab is for **'Talent Development Plan'**. On these 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.

We have provided you a link to the **'Institutional Goals Guidance Tables'** as a reference in determining the appropriate rating for each goal in the sections.



Supervisor Evaluation for Sam Spartan (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 second-level supervisor for approval. **Please note: You should meet with your employee after the second-level supervisor has approved the appraisal.

Institutional Goals Individual Goals Talent Development Plan Attachments 0

Please reference the [Institutional Goals Guidance Tables](#) in determining the appropriate rating for each goal in the section below. Comments are required for each goal rating of "Not Meeting Expectations" and "Exceeding Expectations"

If "Not Meeting Expectations" you must enter the reasons and suggestions for improvement.
If "Exceeding Expectations" you must enter specific example(s) that demonstrate a consistent level of work that exceeds the "meeting expectations" level of performance with minimal oversight.

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

Required fields are indicated with an asterisk (*).

SHRA Performance Plan
Review Status: **Open**
Evaluation Type: Annual
Program Timeframe: 04/12/18 to -
Last Updated: April 17, 2018 11:38
Last Completed Step: Employee Acknowledgement of Mid-Year Check-In
Co-reviewer: Add Co-reviewer



Goal Name:

EXPERTISE

Description:

- a. Precision: Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession.
- b. Resourcing: Makes efficient and appropriate use of materials and documents work appropriately.
- c. Innovation: Looks for ways to improve efficiency or quality.
- d. Development: Maintains technical skills and relevant professional credentials.

Weight:

10


*** Rating**


Please select ▼

Comments

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 

If you have given any of your employees a Talent Development Plan at the beginning of plan year it is important to note that although there is no rating format for the Talent Development Plan, you are to use the comment section to provide feedback detailing the employee's level of achievement on goals outlined in the plan.

Talent Development Goals

Talent Development Goal:

1. Training
2. Re-Certification/License Renewal
3. Cross Training

Comments ←

[Save Draft](#) [Complete](#)

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.

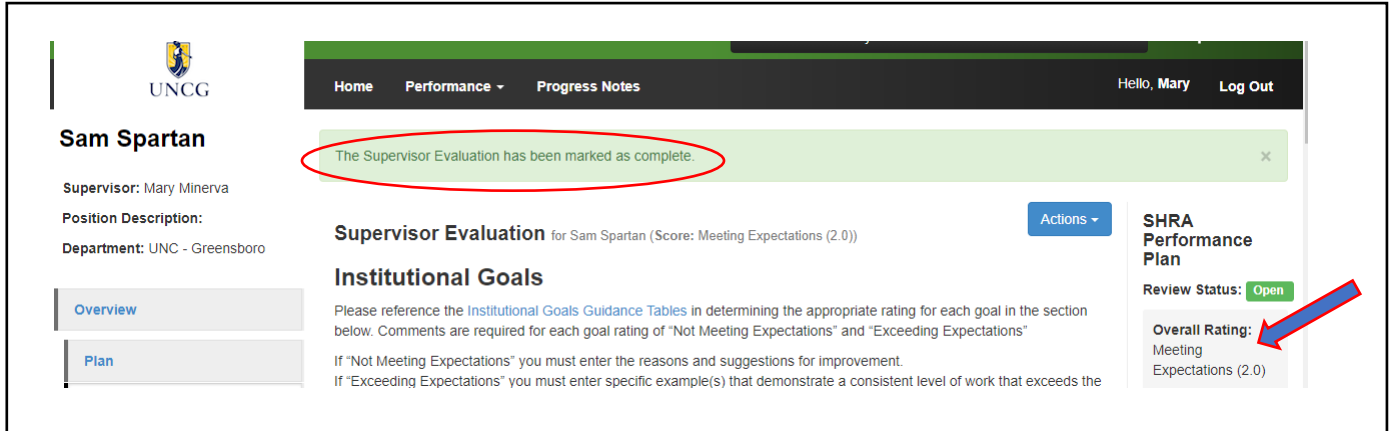
When you select the **'Complete'** button, the following warning screen will appear. Please ensure all necessary information has been entered/completed prior to clicking **'OK'**. If you complete the action in error, you will need to contact the HR system administrator to re-open the task for you.

From uncg-sb.peopleadmin.com

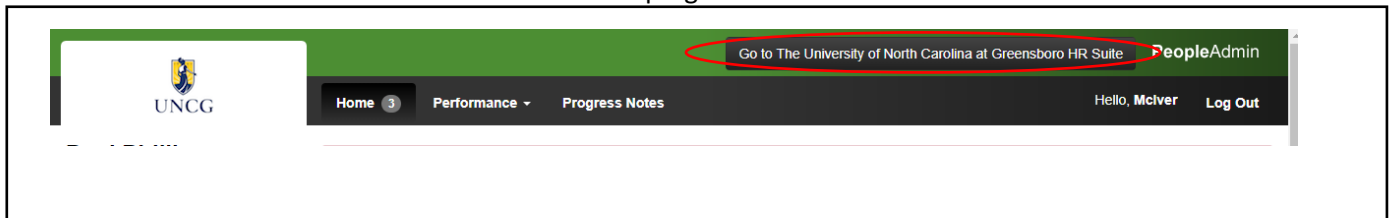
Are you sure you want to complete this supervisor evaluation?

[OK](#) [Cancel](#)

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.



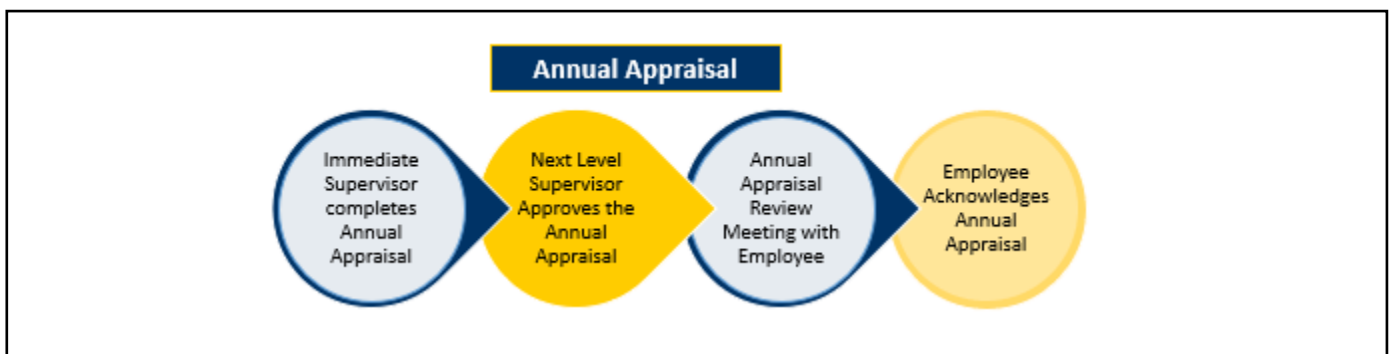
To return to the SpartanTalent ePerformance Management site, click the 'Go to the University of North Carolina at Greensboro HR Suite' button in the top right-hand corner.



Next-Level Supervisor Approves Appraisal



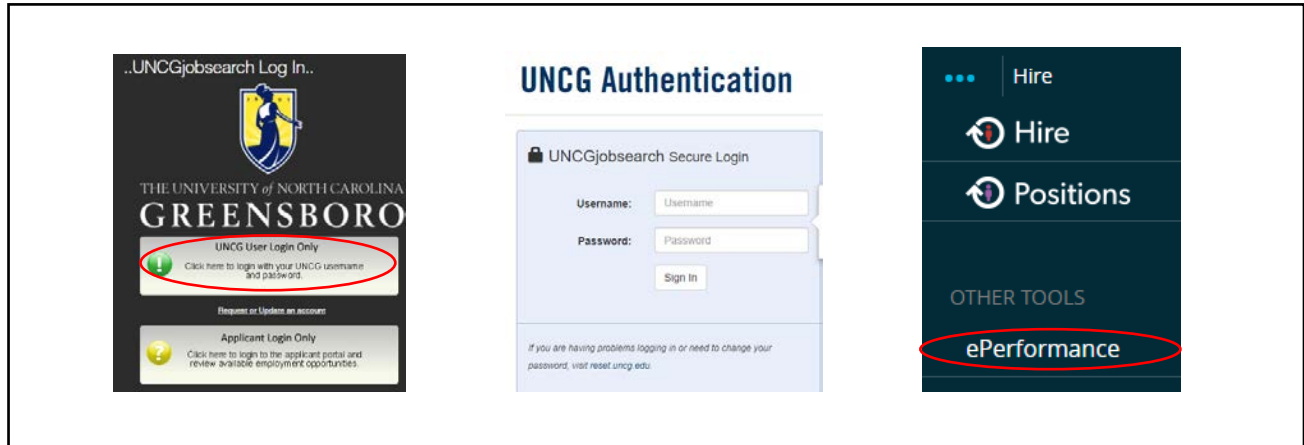
Annual Appraisal Process Steps



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

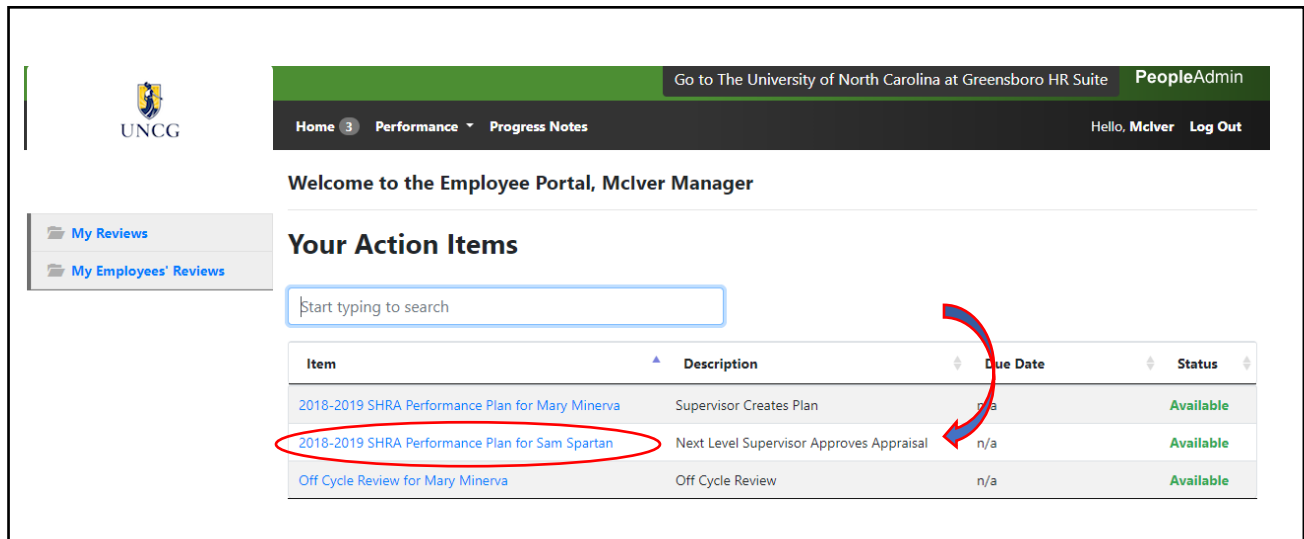


Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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

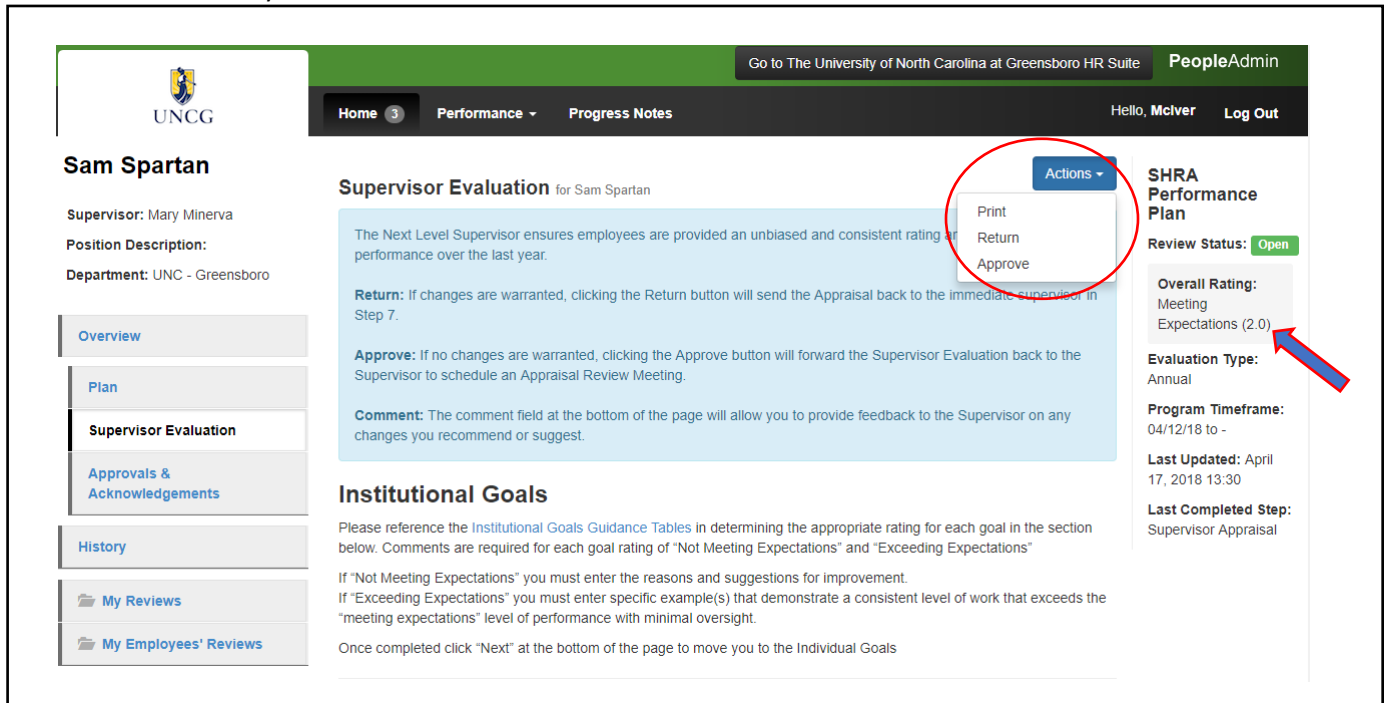
When you reach the UNC Greensboro Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention. Note any due date(s) indicated.

'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'**.



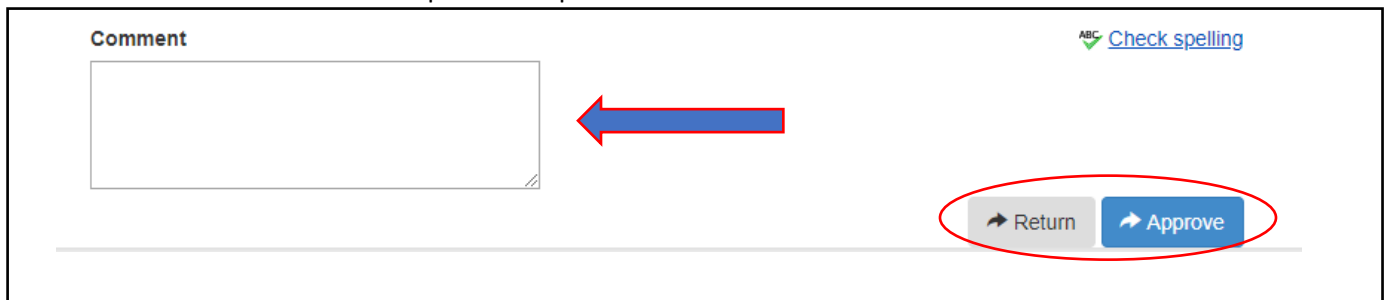
Remember! You should be reviewing the appraisals to make sure your supervisors have done the following:

- Complied with SHRA 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.



The screenshot shows the 'Supervisor Evaluation' page for Sam Spartan. The 'Actions' dropdown menu is highlighted with a red circle, containing 'Print', 'Return', and 'Approve'. On the right side, the 'SHRA Performance Plan' section shows the 'Overall Rating' as 'Meeting Expectations (2.0)', with a blue arrow pointing to it. The page includes a navigation sidebar on the left, a main content area with instructions for 'Return' and 'Approve' actions, and a 'SHRA Performance Plan' summary on the right.

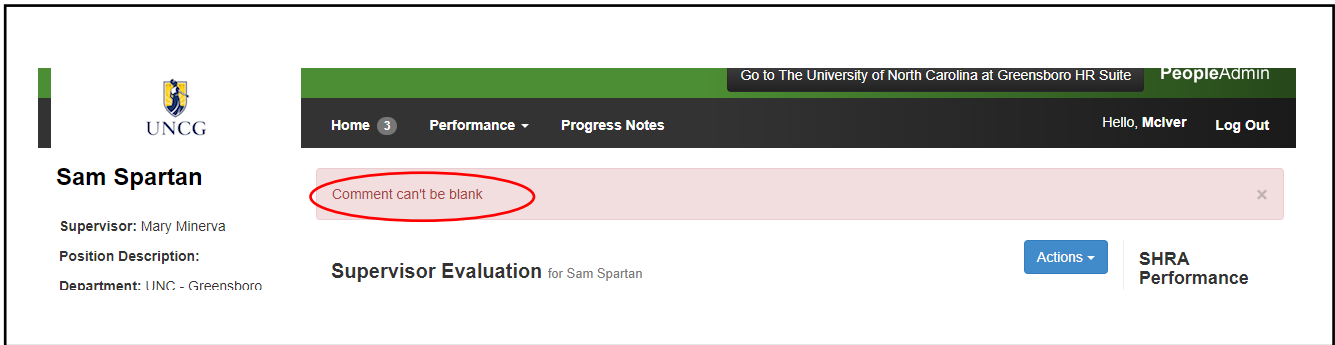
Once your review of the appraisal has been completed, you may either approve or return the appraisal. Choosing the **'Approve'** action indicates your concurrence with the Ratings and Comments, as well as your assurance that all required information is completed and included. Choosing the **'Return'**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



This screenshot shows the bottom of the appraisal form. On the left is a large text area labeled 'Comment'. To the right of the comment box is a blue arrow pointing left. At the bottom right, there are two buttons: 'Return' and 'Approve', both of which are circled in red.

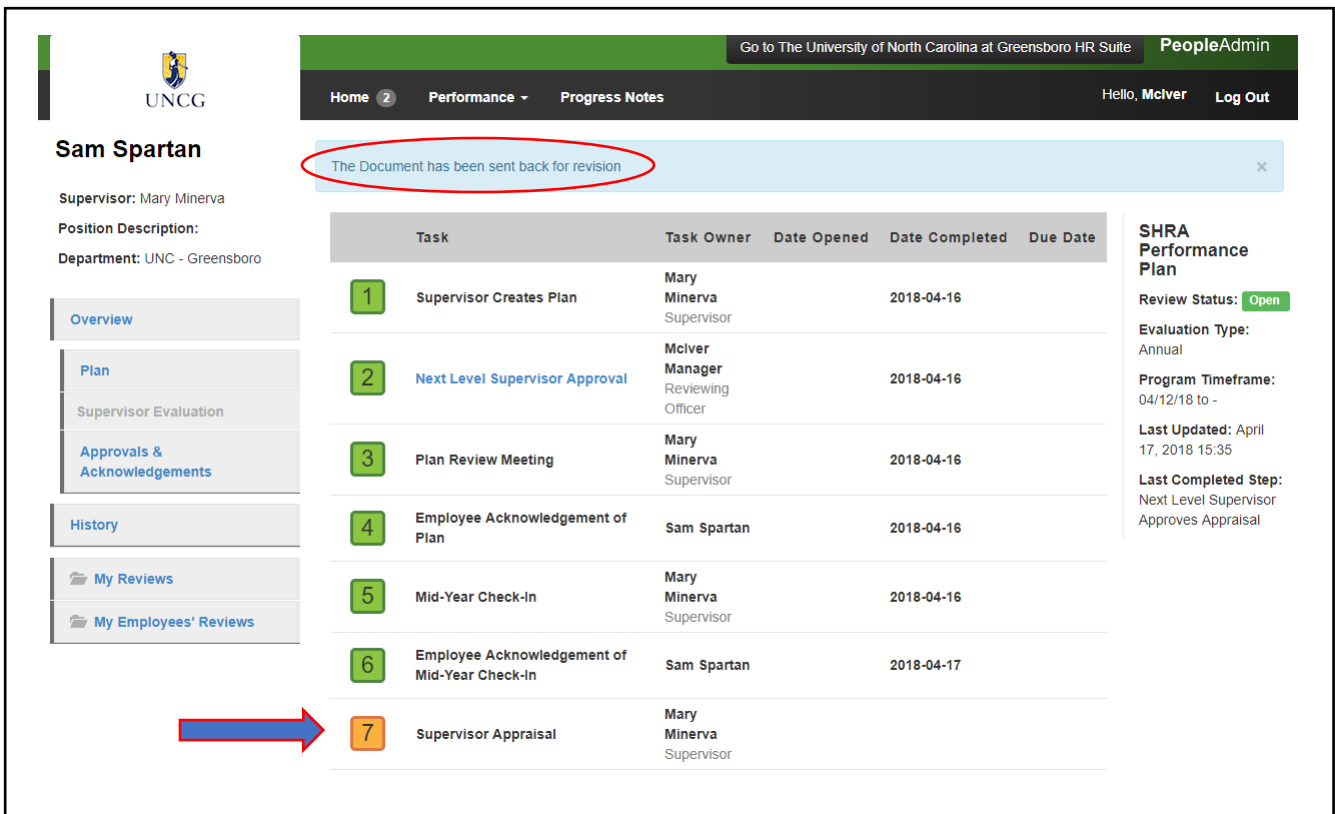
Note: The Next-Level Supervisor should ensure that all required information- Comments, Performance Improvement etc. is completed prior to making the Supervisor Appraisal as **'Approved'**. If items are missing, please say what actions need to be completed in the comment box and choose the **'Return'**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

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



The screenshot shows the PeopleAdmin interface for a Supervisor Evaluation. A red circle highlights a pink error message box that says "Comment can't be blank". The page title is "Supervisor Evaluation for Sam Spartan".

Once the **'Return'** action is completed correctly, you will be brought to the following action screen 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 7.

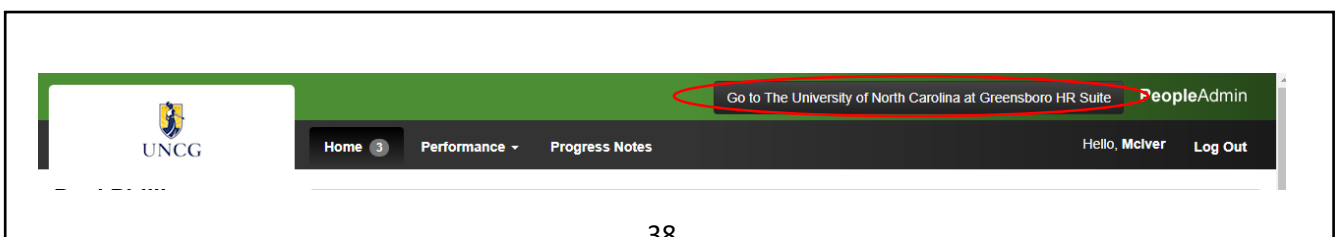


The screenshot shows the PeopleAdmin interface after a successful return. A blue message box at the top states "The Document has been sent back for revision". Below it is a task list table with 7 items. A red arrow points to the 7th task, "Supervisor Appraisal".

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		2018-04-16	
4 Employee Acknowledgement of Plan	Sam Spartan		2018-04-16	
5 Mid-Year Check-In	Mary Minerva Supervisor		2018-04-16	
6 Employee Acknowledgement of Mid-Year Check-In	Sam Spartan		2018-04-17	
7 Supervisor Appraisal	Mary Minerva Supervisor			

On the right side of the screen, the "SHRA Performance Plan" section shows a "Review Status: Open" and "Evaluation Type: Annual".

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 interface. A red circle highlights the button labeled "Go to The University of North Carolina at Greensboro HR Suite".

Supervisor/Employee Appraisal Discussion

	<h3>Appraisal Meeting</h3>	<p>Mary Minerva Supervisor</p>
---	----------------------------	------------------------------------

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.

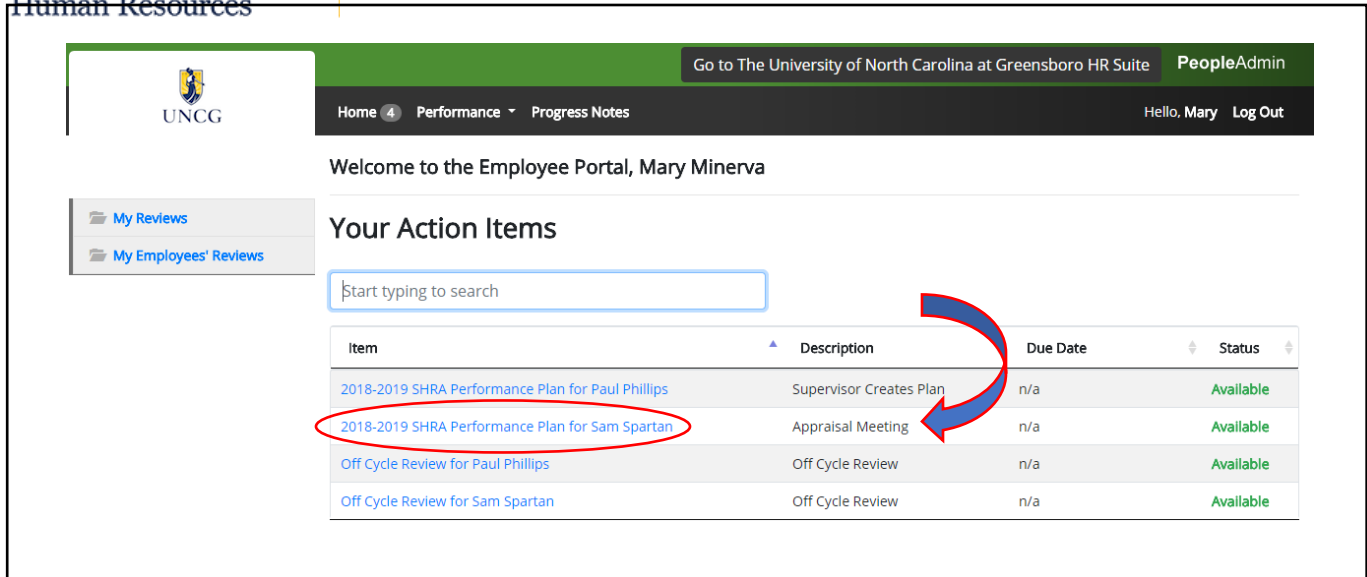


Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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 HR Suite **PeopleAdmin**

Home Performance Progress Notes Hello, Mary Log Out

Welcome to the Employee Portal, Mary Minerva

Your Action Items

Start typing to search

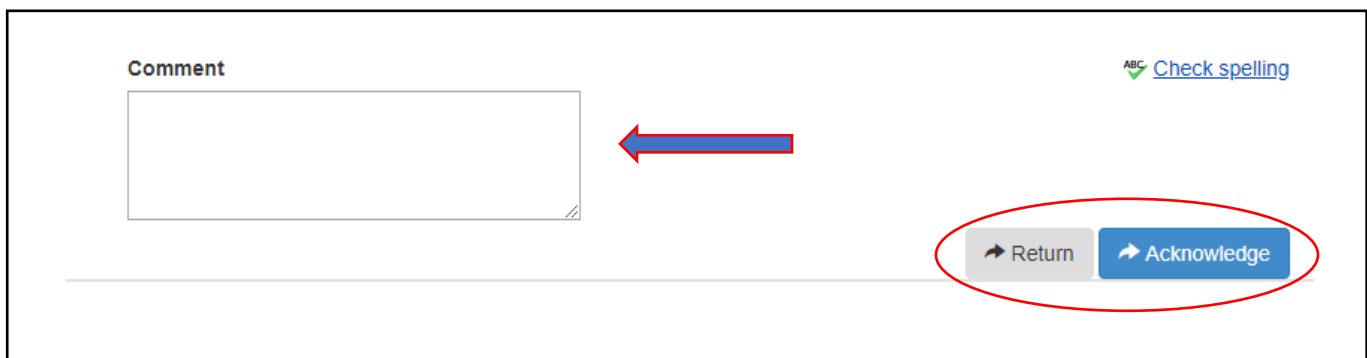
Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Appraisal Meeting	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	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.

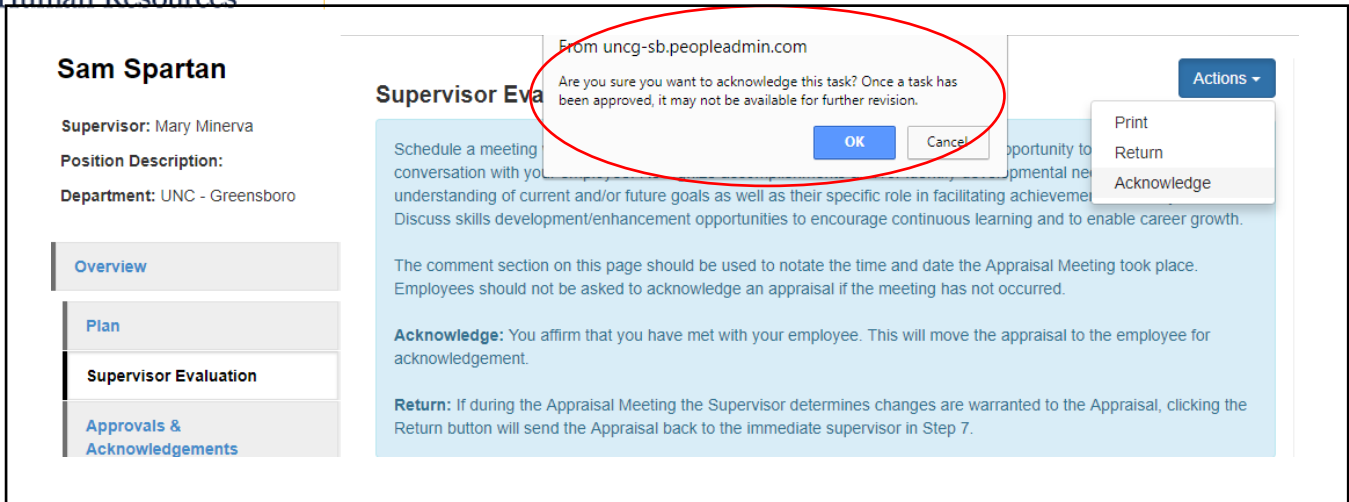
Return: If during the Appraisal Meeting the Supervisor determines changes are warranted to the Appraisal, clicking the **'Return'** button will send the Appraisal back to the immediate supervisor in Step 7.



Comment ABC [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.



Sam Spartan

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

Supervisor Evaluation

From uncg-sb.peopleadmin.com
Are you sure you want to acknowledge this task? Once a task has been approved, it may not be available for further revision.

OK Cancel

Print
Return
Acknowledge

Supervisor Evaluation

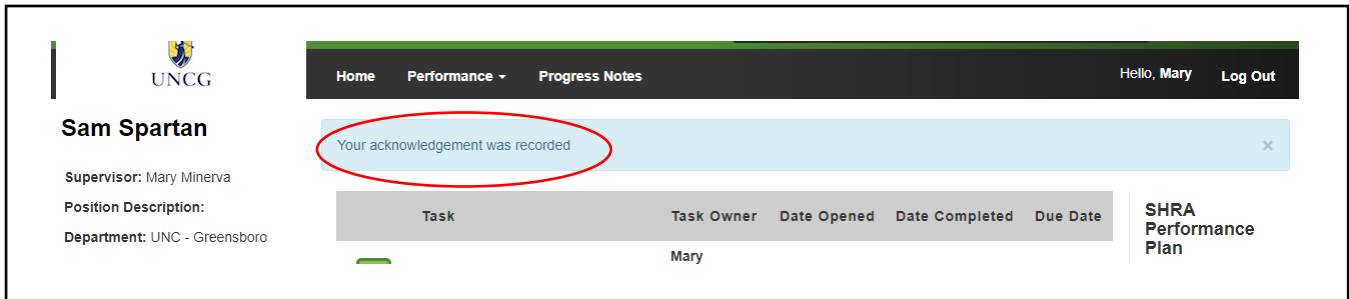
Schedule a meeting conversation with your employee to discuss their performance, provide feedback, and discuss opportunities to improve performance. This is an important opportunity to discuss your employee's understanding of current and/or future goals as well as their specific role in facilitating achievement. Discuss skills development/enhancement opportunities to encourage continuous learning and to enable career growth.

The comment section on this page should be used to notate the time and date the Appraisal Meeting took place. 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.

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.



UNCG

Home Performance Progress Notes Hello, Mary 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
	Mary			

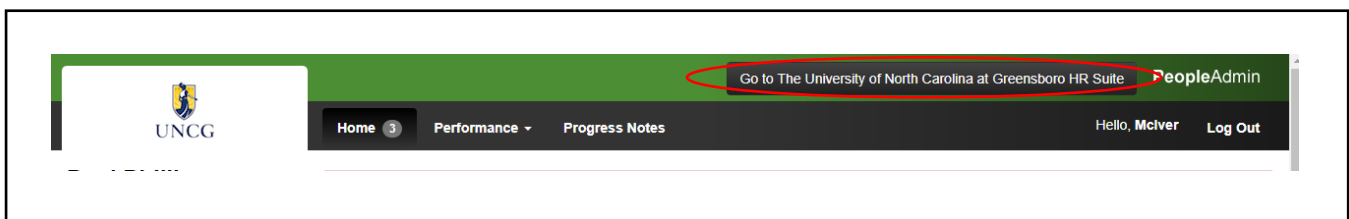
SHRA Performance Plan

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.



UNCG

Home Performance Progress Notes Hello, McIver Log Out

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

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 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.

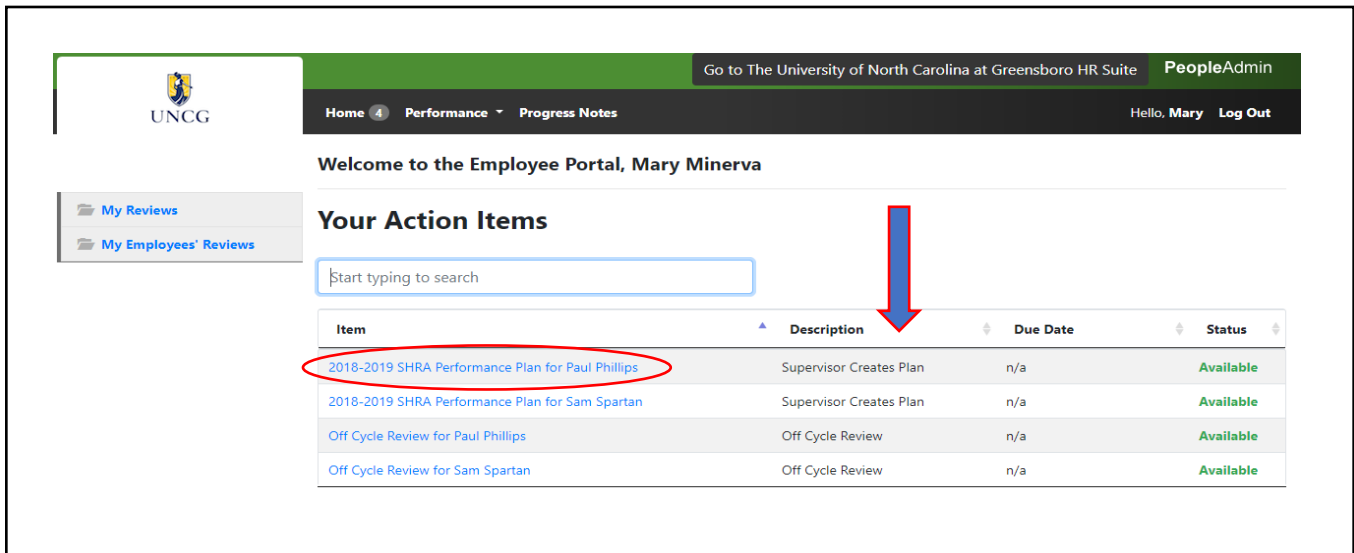
Optional Co-Reviewer

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 HR Suite **PeopleAdmin**

Home Performance Progress Notes Hello, Mary Log Out

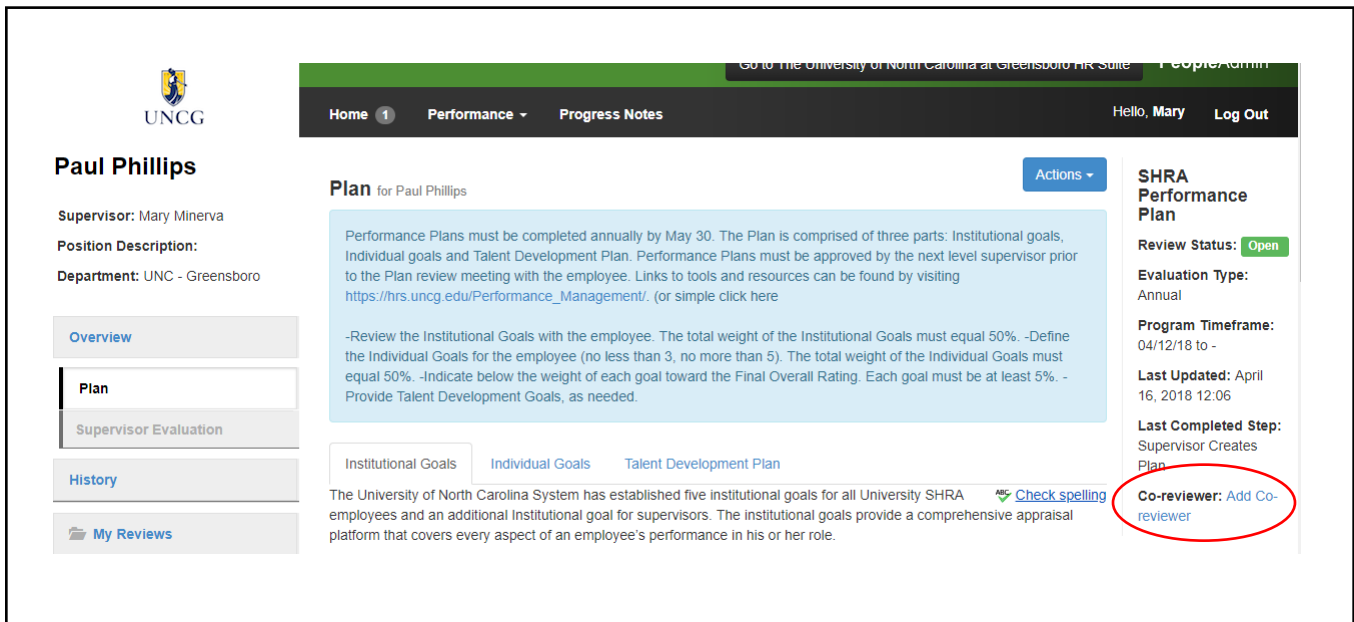
Welcome to the Employee Portal, Mary Minerva

Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Supervisor Creates Plan	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	n/a	Available

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 HR Suite **PeopleAdmin**

Home Performance Progress Notes Hello, Mary Log Out

Paul Phillips

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

Overview
Plan
Supervisor Evaluation
History
My Reviews

Plan for Paul Phillips

Performance Plans must be completed annually by May 30. The Plan is comprised of three parts: Institutional goals, Individual goals and Talent Development Plan. Performance Plans must be approved by the next level supervisor prior to the Plan review meeting with the employee. Links to tools and resources can be found by visiting https://hrs.uncg.edu/Performance_Management/. (or simple click here)

-Review the Institutional Goals with the employee. The total weight of the Institutional Goals must equal 50%. -Define the Individual Goals for the employee (no less than 3, no more than 5). The total weight of the Individual Goals must equal 50%. -Indicate below the weight of each goal toward the Final Overall Rating. Each goal must be at least 5%. - Provide Talent Development Goals, as needed.

Institutional Goals Individual Goals Talent Development Plan

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. [Check spelling](#)

SHRA Performance Plan

Review Status: **Open**

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: April 16, 2018 12:06

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.

	Name	Login	Department	Supervisor
<input checked="" type="checkbox"/>	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 HR Suite](#)
PeopleAdmin

Home 1 Performance Progress Notes
Hello, Mary Log Out

Paul Phillips

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

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

Plan for Paul Phillips

Performance Plans must be completed annually by May 30. The Plan is comprised of three parts: Institutional goals, Individual goals and Talent Development Plan. Performance Plans must be approved by the next level supervisor prior to the Plan review meeting with the employee. Links to tools and resources can be found by visiting https://hrs.uncg.edu/Performance_Management/. (or simple click here)

-Review the Institutional Goals with the employee. The total weight of the Institutional Goals must equal 50%. -Define the Individual Goals for the employee (no less than 3, no more than 5). The total weight of the Individual Goals must equal 50%. -Indicate below the weight of each goal toward the Final Overall Rating. Each goal must be at least 5%. - Provide Talent Development Goals, as needed.

Institutional Goals
Individual Goals
Talent Development Plan

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%

Required fields are indicated with an asterisk (*).

SHRA Performance Plan

Review Status: Open

Evaluation Type: Annual

Program Timeframe: 04/12/18 to -

Last Updated: April 16, 2018 12:06

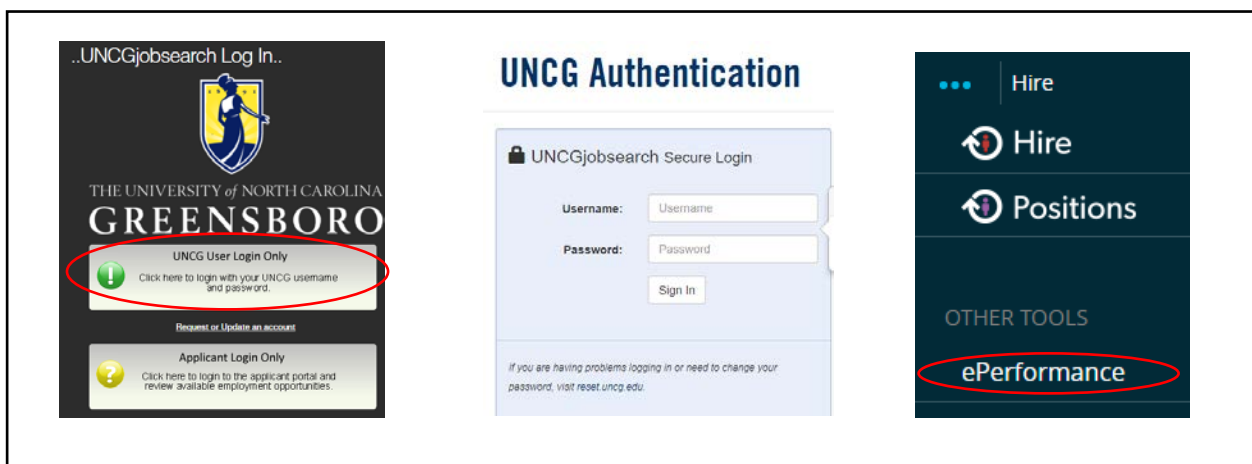
Last Completed Step: Supervisor Creates Plan

Co-reviewer: Sam Spartan

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 add an 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.

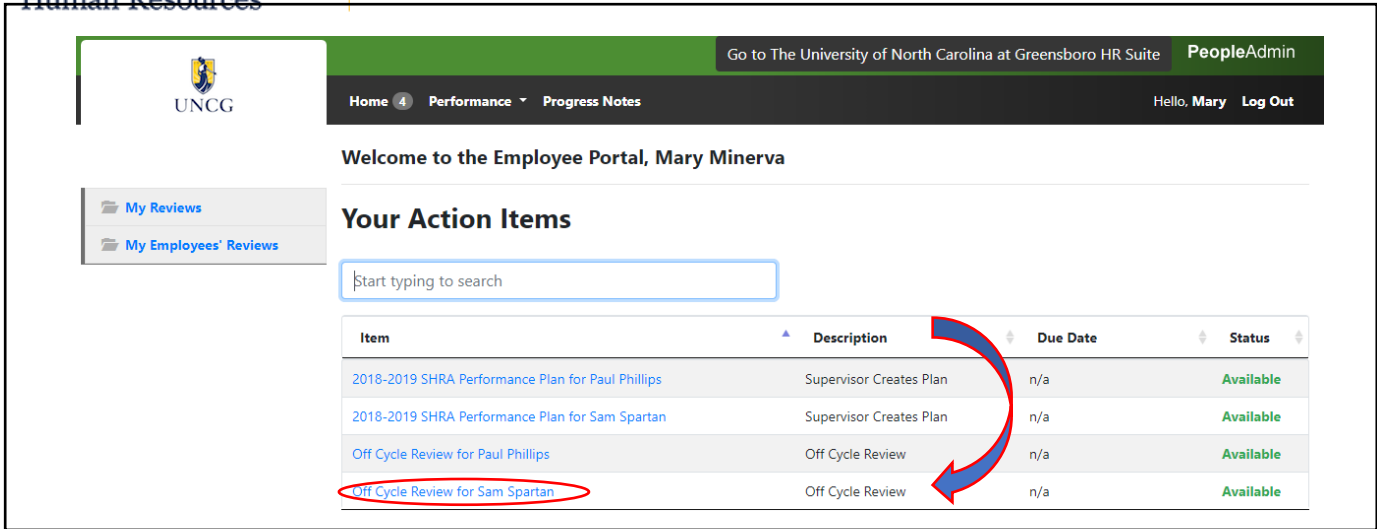
The steps to initiate an Off-Cycle review depends on if it is the employee's first off-cycle review in this performance cycle. Follow the instructions that fit your scenario:

1. Employee's first Off-Cycle review in the current performance cycle.
2. Employee's second or subsequent Off-Cycle review in the current performance cycle.

Scenario 1. Employee's First Off-Cycle Review in Current Performance Cycle

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 create the first Off-Cycle review for the performance cycle, select the description title that reads **'Off-Cycle Review'**.



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

Home Performance Progress Notes Hello, Mary Log Out

Welcome to the Employee Portal, Mary Minerva

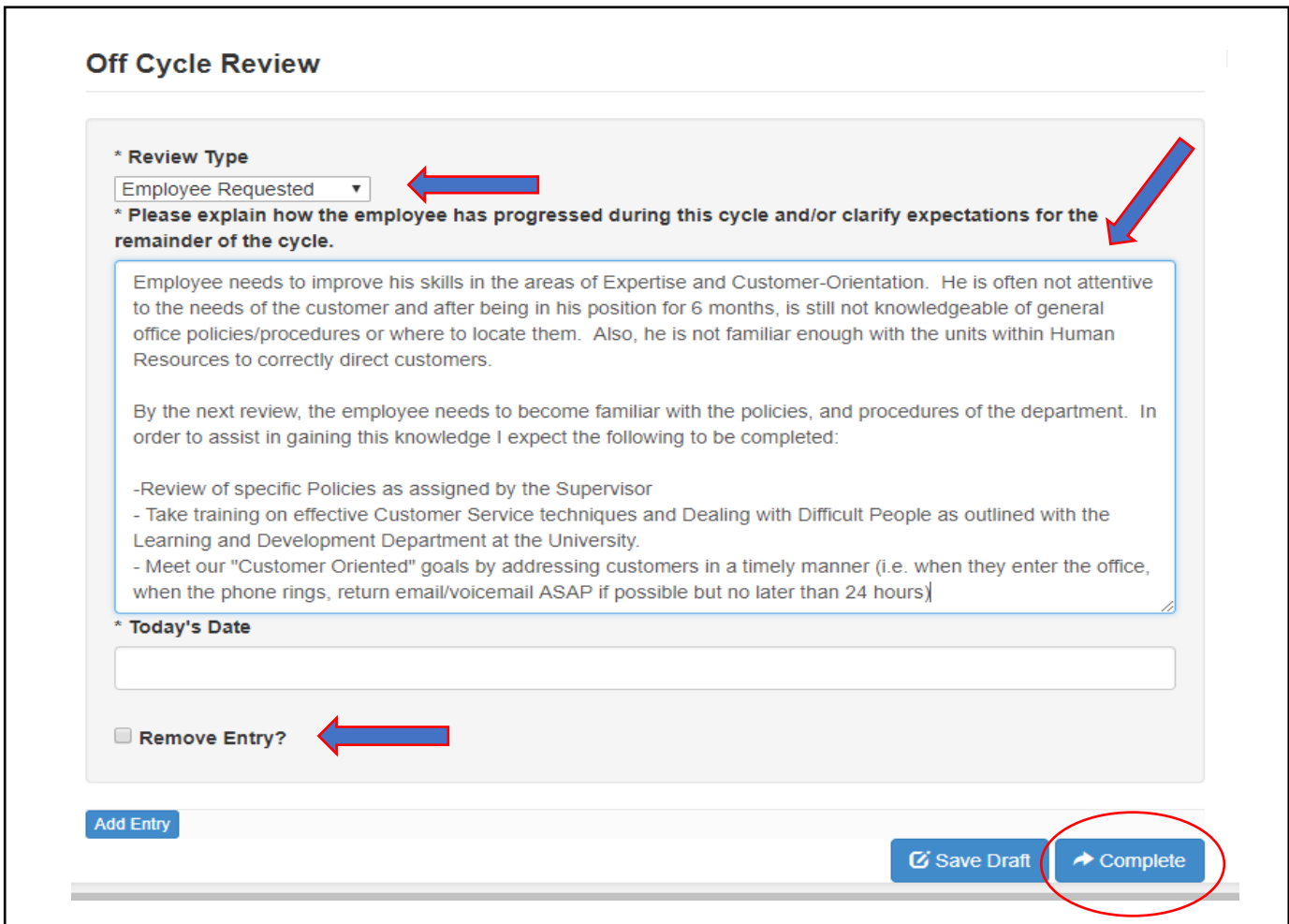
Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for Paul Phillips	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for Sam Spartan	Supervisor Creates Plan	n/a	Available
Off Cycle Review for Paul Phillips	Off Cycle Review	n/a	Available
Off Cycle Review for Sam Spartan	Off Cycle Review	n/a	Available

Note: The Off-Cycle Review has no due date; however, you should be aware of the timeline for any Off-Cycle review (or Talent Conversation) that applies to your employee and enter it into this program accordingly.

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



Off Cycle Review

* **Review Type**

Employee Requested

* **Please explain how the employee has progressed during this cycle and/or clarify expectations for the remainder of the cycle.**

Employee needs to improve his skills in the areas of Expertise and Customer-Orientation. He is often not attentive to the needs of the customer and after being in his position for 6 months, is still not knowledgeable of general office policies/procedures or where to locate them. Also, he is not familiar enough with the units within Human Resources to correctly direct customers.

By the next review, the employee needs to become familiar with the policies, and procedures of the department. In order to assist in gaining this knowledge I expect the following to be completed:

- Review of specific Policies as assigned by the Supervisor
- Take training on effective Customer Service techniques and Dealing with Difficult People as outlined with the Learning and Development Department at the University.
- Meet our "Customer Oriented" goals by addressing customers in a timely manner (i.e. when they enter the office, when the phone rings, return email/voicemail ASAP if possible but no later than 24 hours)

* **Today's Date**

Remove Entry?

Add Entry

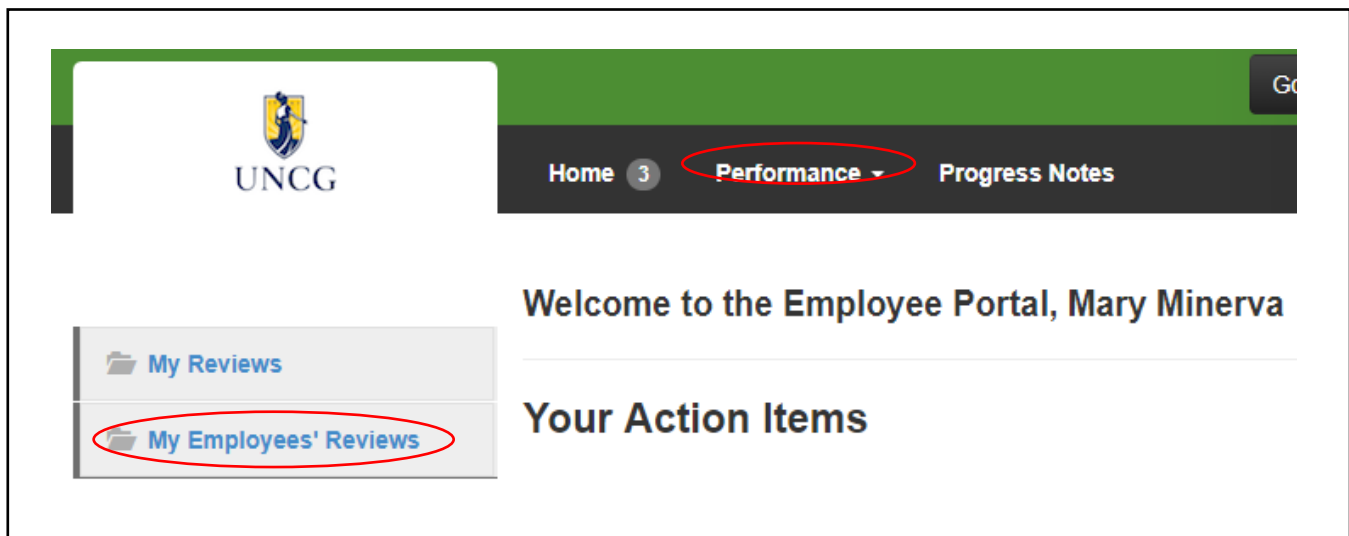
Save Draft Complete

When you complete your first Off-Cycle review in the current performance cycle you will click the **'Complete'** button. At this time the review will go to your employee for Acknowledgement. Once they have acknowledged the review it will be available for you to go back into the same program and add another review when appropriate. Instructions on how to add the second or subsequent Off-Cycle review may be found in the instructions on the next scenario.

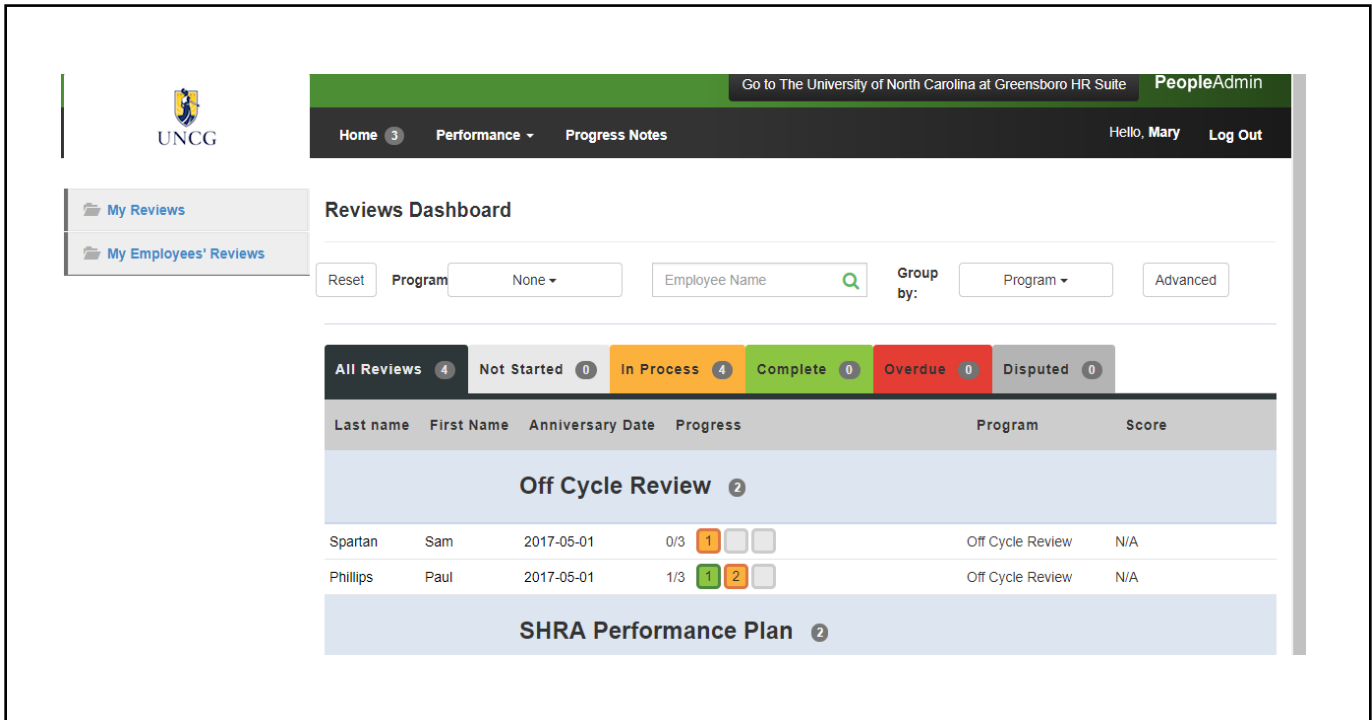
Scenario 2. Employee's Second or Subsequent Off-Cycle Review in Current Performance Cycle.

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.

The second and subsequent times you enter an Off-Cycle review for your employee, you will have the ability to search for the Off-Cycle review by either going to the **'Performance'** menu at the top left of your screen. Click **'My Employee Reviews'** to see past and current performance review cycles documented in the Spartan Talent ePerformance system. You may also choose the **'My Employee Reviews'** folder located on the far left of the screen, both options will bring up your **'Reviews Dashboard'**.

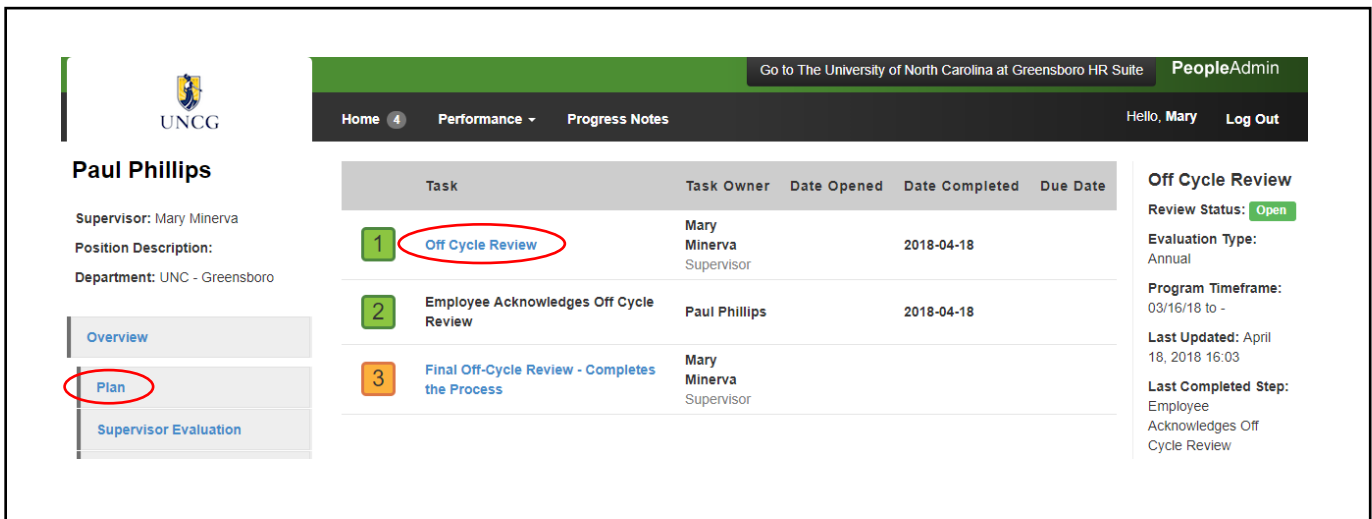


When the screen below appears, it will automatically show you the current performance cycle programs which include the SHRA Performance Review and Off-Cycle Review for each of your employees which are currently open. You can also use the search bar or the program filter to find the desired program. Select the employee for whom you wish to create an Off-Cycle review by clicking their name.



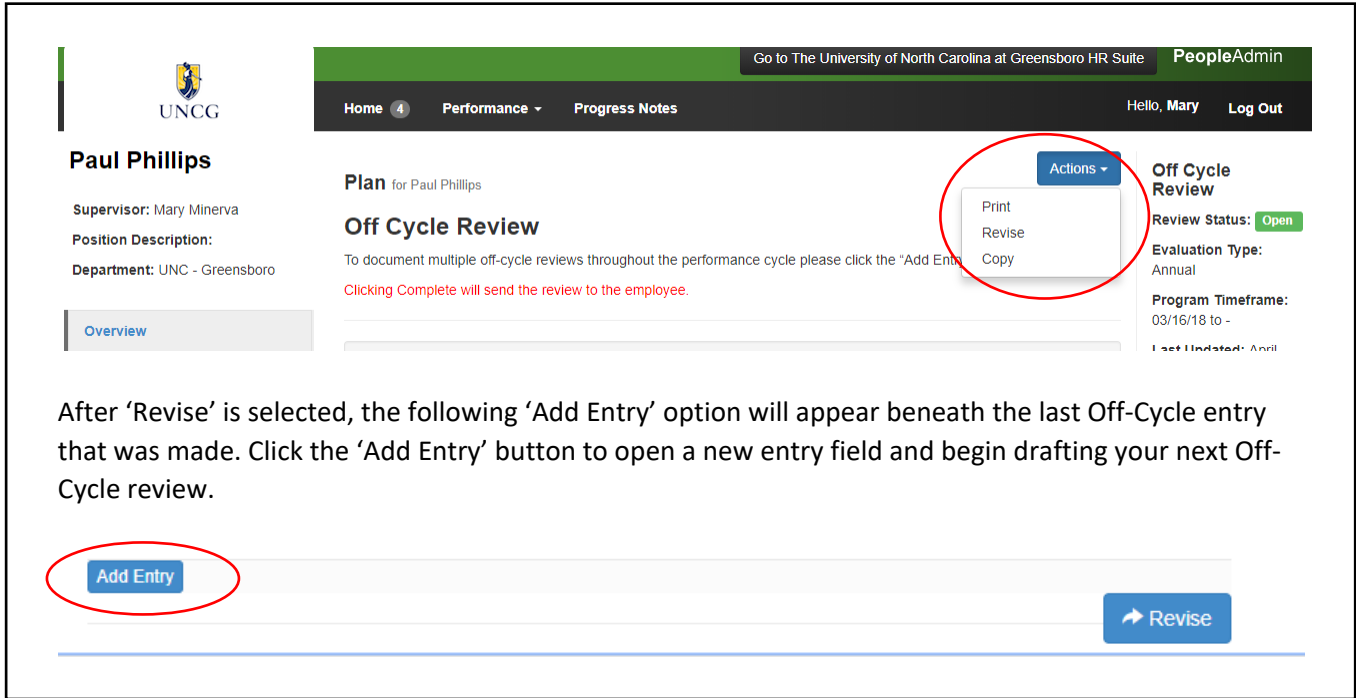
The screenshot shows the 'Reviews Dashboard' in PeopleAdmin. The top navigation bar includes 'Home', 'Performance', and 'Progress Notes'. The dashboard features a search bar for 'Employee Name' and a 'Group by' dropdown set to 'Program'. A summary bar shows counts for 'All Reviews' (4), 'Not Started' (0), 'In Process' (4), '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'. Two rows are visible under the 'Off Cycle Review' program: one for Sam Spartan (0/3 progress) and one for Paul Phillips (1/3 progress). A 'SHRA Performance Plan' section is also visible below the table.

When the following screen appears choose the 'Plan' link in the left navigation pane or click the 'Off-Cycle Review' link to open the Off-Cycle review.



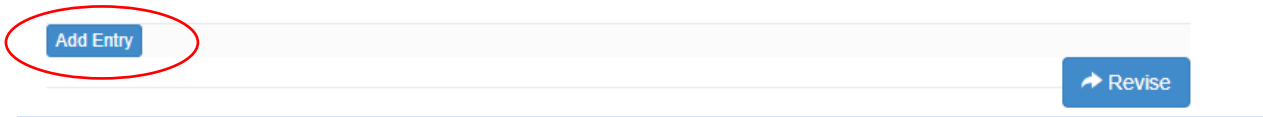
The screenshot shows the profile page for Paul Phillips. The left navigation pane has 'Plan' highlighted with a red circle. The main content area displays a task list with three items: 'Off Cycle Review' (circled in red), 'Employee Acknowledges Off Cycle Review', and 'Final Off-Cycle Review - Completes the Process'. The right sidebar shows details for the 'Off Cycle Review', including 'Review Status: Open', 'Evaluation Type: Annual', and 'Program Timeframe: 03/16/18 to -'. The 'Last Updated' date is April 18, 2018, 16:03.

Once the Off-Cycle Review is selected, the following screen will appear. You will see the previous Off-Cycle review(s) you entered in this cycle. To add your new or most recent Off-Cycle review you should click the blue **'Actions'** button and select **'Revise'**.



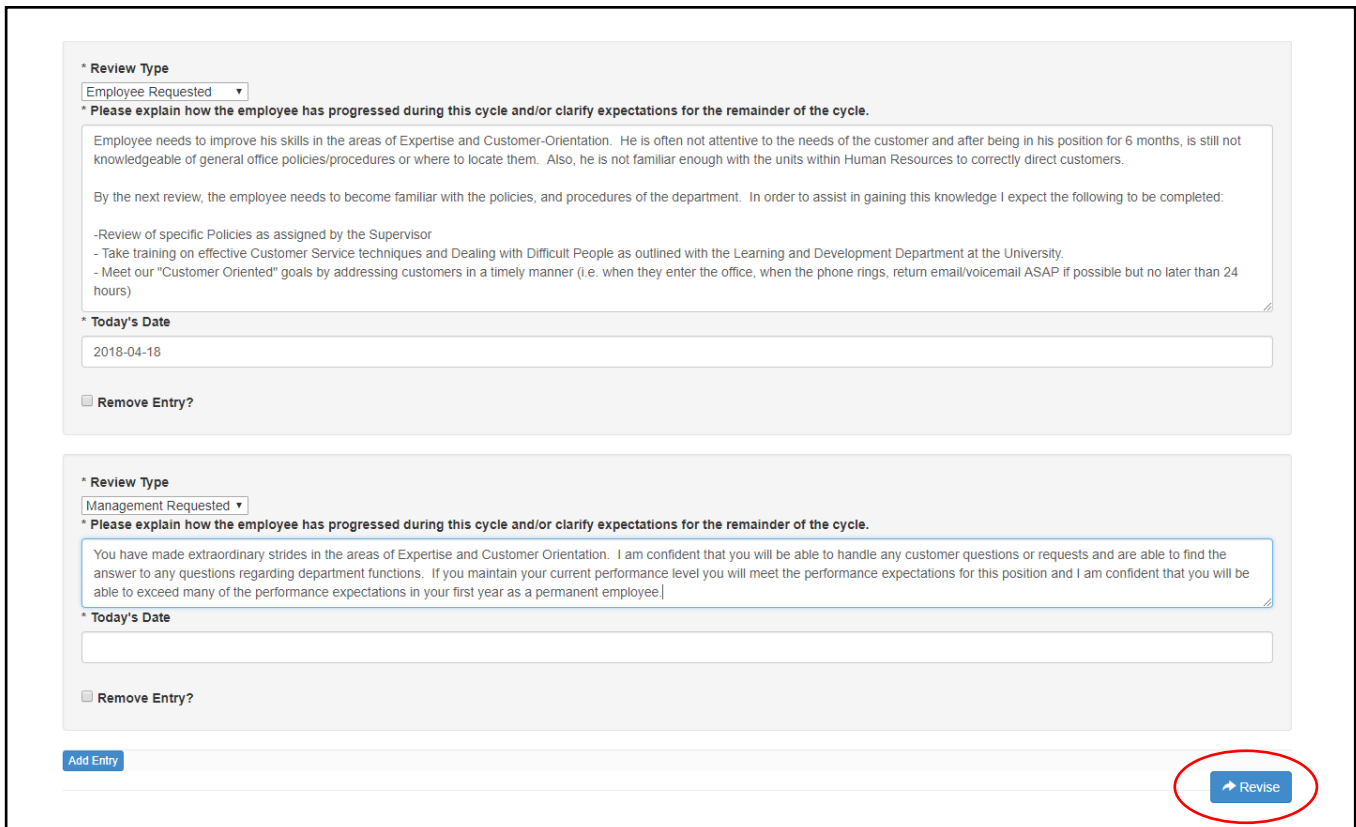
The screenshot shows the 'Off Cycle Review' page for Paul Phillips. The 'Actions' dropdown menu is highlighted with a red circle, showing options for 'Print', 'Revise', and 'Copy'. The 'Revise' option is the target of the instruction.

After 'Revise' is selected, the following 'Add Entry' option will appear beneath the last Off-Cycle entry that was made. Click the 'Add Entry' button to open a new entry field and begin drafting your next Off-Cycle review.



The screenshot shows the 'Add Entry' button highlighted with a red circle, and a 'Revise' button at the bottom right of the page.

When you are finished entering your new Off-Cycle review, click **'Revise'** at the bottom of the page to complete the action and send it to your employee for acknowledgement.



The screenshot shows the 'Add Entry' form with two review entries. The 'Revise' button at the bottom right is highlighted with a red circle.

*** Review Type**
Employee Requested

*** Please explain how the employee has progressed during this cycle and/or clarify expectations for the remainder of the cycle.**

Employee needs to improve his skills in the areas of Expertise and Customer-Orientation. He is often not attentive to the needs of the customer and after being in his position for 6 months, is still not knowledgeable of general office policies/procedures or where to locate them. Also, he is not familiar enough with the units within Human Resources to correctly direct customers.

By the next review, the employee needs to become familiar with the policies, and procedures of the department. In order to assist in gaining this knowledge I expect the following to be completed:

- Review of specific Policies as assigned by the Supervisor
- Take training on effective Customer Service techniques and Dealing with Difficult People as outlined with the Learning and Development Department at the University.
- Meet our "Customer Oriented" goals by addressing customers in a timely manner (i.e. when they enter the office, when the phone rings, return email/voicemail ASAP if possible but no later than 24 hours)

*** Today's Date**
2018-04-18

Remove Entry?

*** Review Type**
Management Requested

*** Please explain how the employee has progressed during this cycle and/or clarify expectations for the remainder of the cycle.**

You have made extraordinary strides in the areas of Expertise and Customer Orientation. I am confident that you will be able to handle any customer questions or requests and are able to find the answer to any questions regarding department functions. If you maintain your current performance level you will meet the performance expectations for this position and I am confident that you will be able to exceed many of the performance expectations in your first year as a permanent employee.

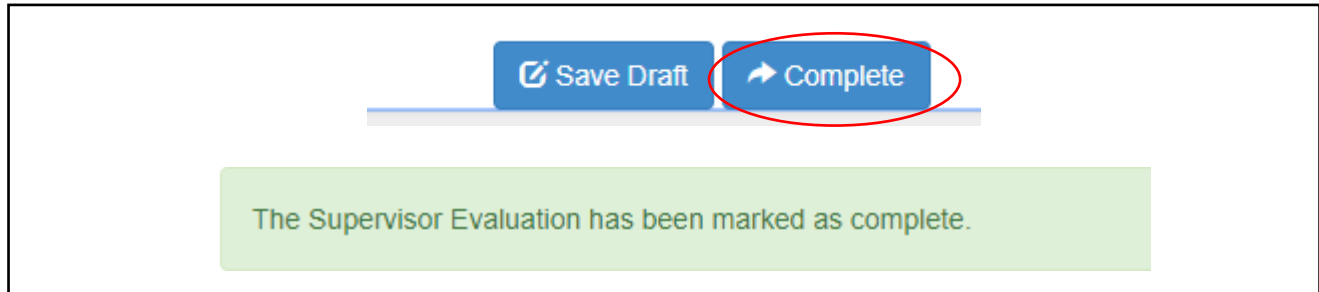
*** Today's Date**

Remove Entry?

[Add Entry](#) [Revise](#)

Final Off-Cycle Review- Completes the Process

When you are finished entering your Off-Cycle reviews for the **'Entire Performance Cycle'** meaning you will not enter any more Off-Cycle Reviews for the year, you can close out the process by selecting the **'Final Off-Cycle Review- Completes the Process'** Once you have completed, you will close the review cycle for your employee and the task can not be re-opened without HR intervention. Ensure that you are at the final review for your employee before completing. The system will automatically prompt you with the question of **"are you sure you want to complete this action"**, click **'OK'** and you will see a prompt notifying you that the Supervisor Evaluation has been marked as complete.



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.

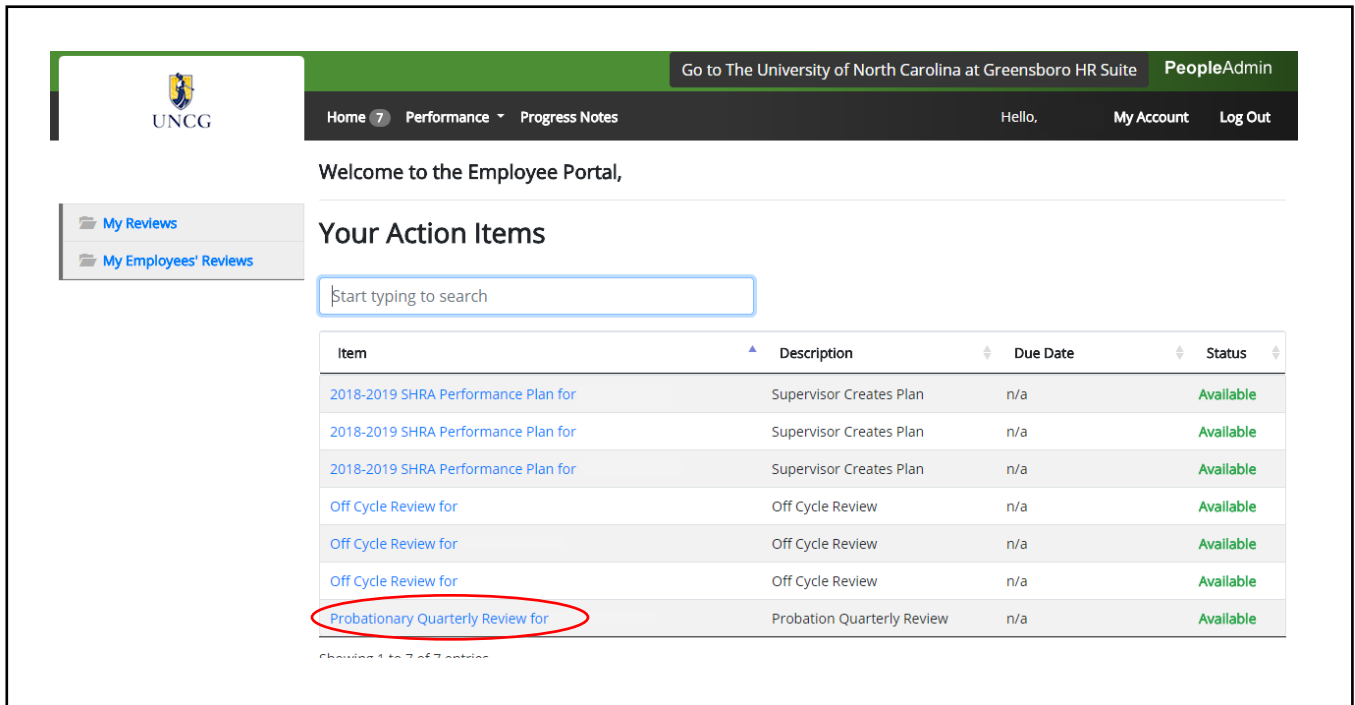
To add a Probationary Quarterly Review, log into SpartanTalent ePerformance Management (<https://spartantalent.uncg.edu/hr/sessions/new>) using your UNCG login credentials.



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.

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



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

Home 7 Performance Progress Notes Hello, My Account Log Out

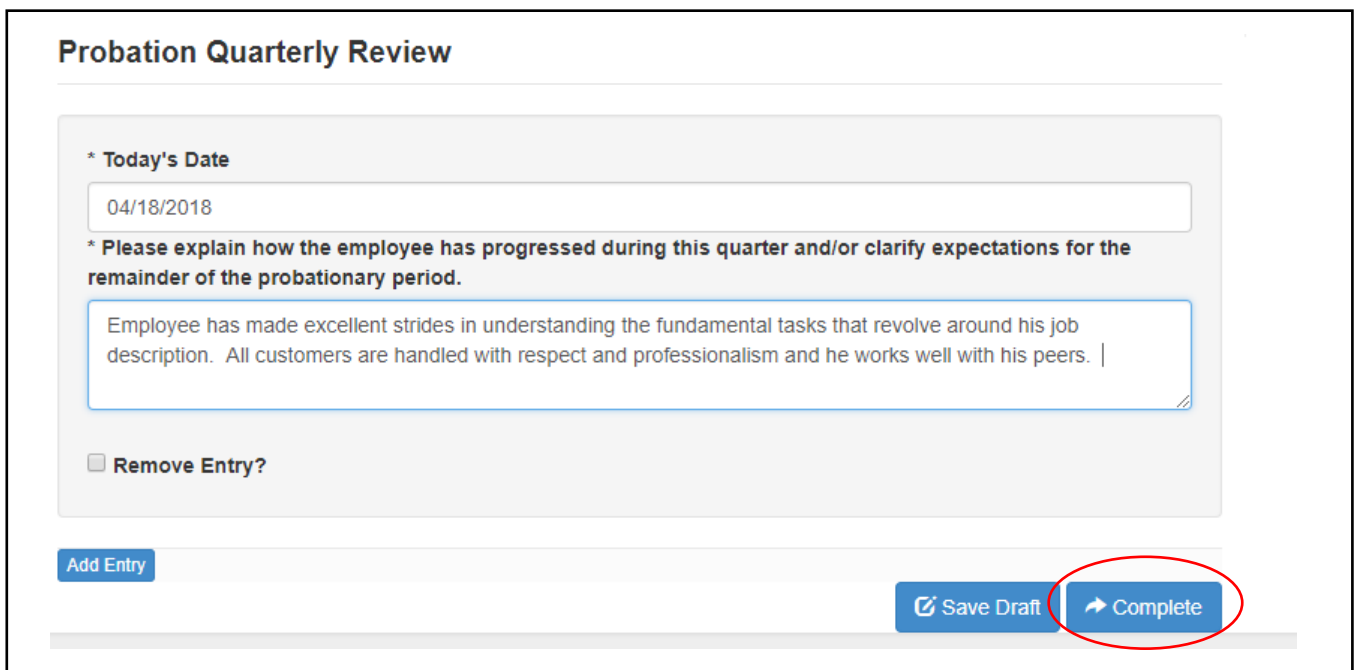
Welcome to the Employee Portal,

Your Action Items

start typing to search

Item	Description	Due Date	Status
2018-2019 SHRA Performance Plan for	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for	Supervisor Creates Plan	n/a	Available
2018-2019 SHRA Performance Plan for	Supervisor Creates Plan	n/a	Available
Off Cycle Review for	Off Cycle Review	n/a	Available
Off Cycle Review for	Off Cycle Review	n/a	Available
Off Cycle Review for	Off Cycle Review	n/a	Available
Probationary Quarterly Review for	Probation Quarterly Review	n/a	Available

Once the **'Probationary Quarterly Review'** is selected, the following screen will appear. Here you will enter the following information



Probation Quarterly Review

* Today's Date

04/18/2018

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

Employee has made excellent strides in understanding the fundamental tasks that revolve around his job description. All customers are handled with respect and professionalism and he works well with his peers. |

Remove Entry?

Add Entry

Save Draft Complete

When you complete your 'Probationary Quarterly Review' in the current performance cycle you will click the '**Complete**' button. At this time the review will go to your employee for Acknowledgement.

Note: You will be required to complete a 'Probationary Quarterly Review' every 90 days based off the employee's anniversary date of hire. Unlike Off-Cycle Reviews the task is closed and completed once the employee acknowledges the review. There is no action needed on your part to generate the next 'Probationary Quarterly Review' for your employee as they will automatically populate in '**Your Action Items**' when the task is due.

This concludes the training for SHRA 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_7WluplFY03m69w1