SPARTANTALENT EPERFORMANCE SHRA SUPERVISOR USER GUIDE

Stay on target with **ePerformance**

UNC GREENSBORO
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SPARTAN TALENT e-Performance -Supervisor Guide

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Navigating the SpartanTalent ePerformance Module

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

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

Logging in and Accessing the Employee Portal

Log into SpartanTalent ePerformance Management (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.
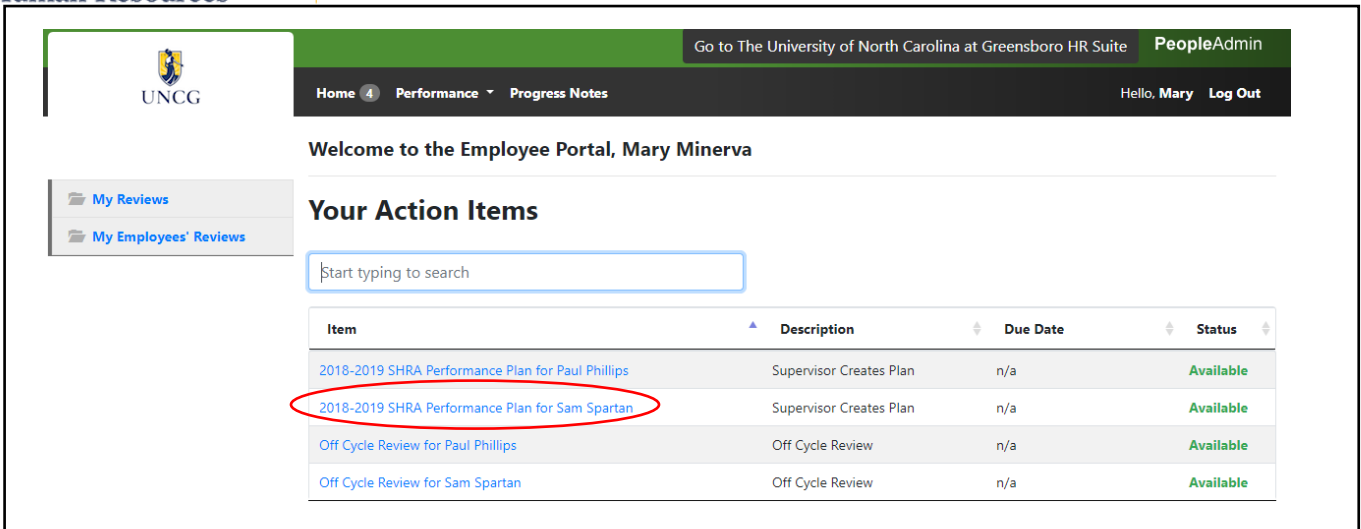

Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page.

Note, you can access this link from any 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.
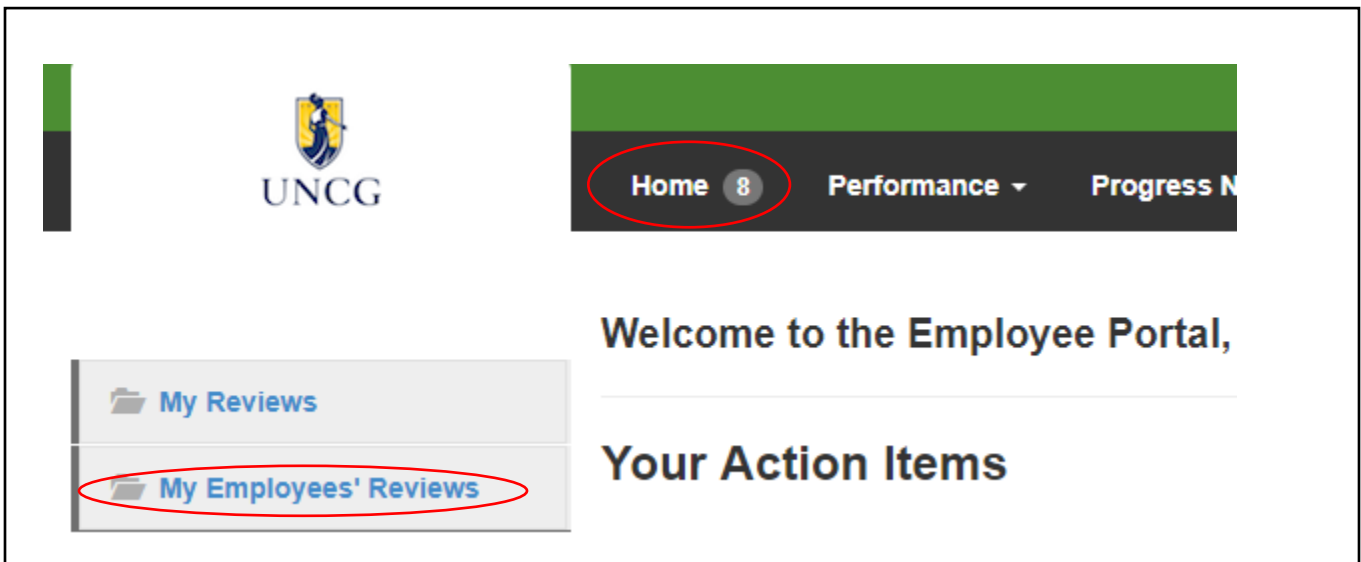
If you need to get back to **'Your Action Items'** page, click the **'Home'** button at the top of your screen.

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'**

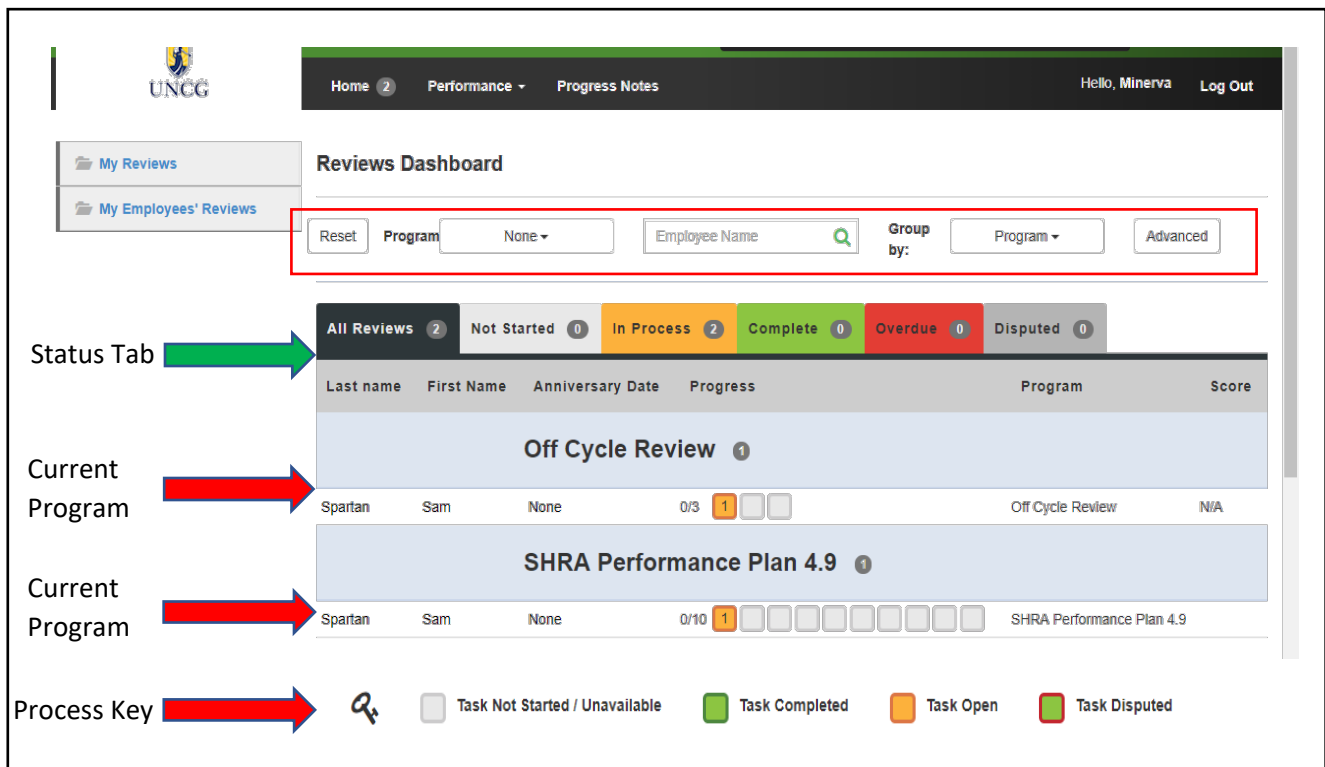## Searching and Dashboard

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.
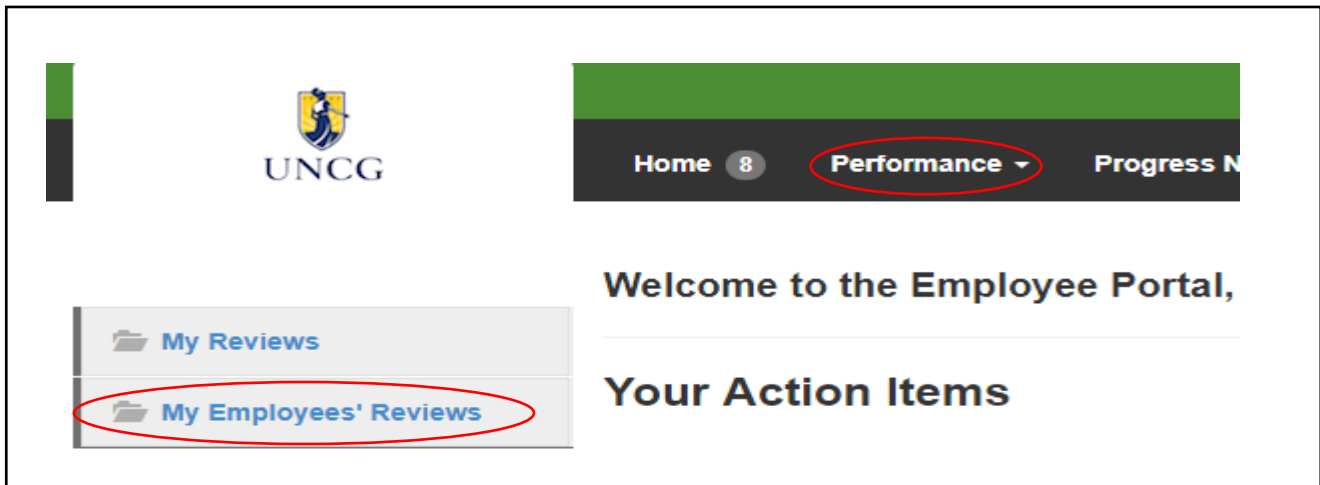
When the screen below appears, it will automatically show you the current active performance cycle programs which are open. (If you notice any discrepancies, call Ext. 4-4508 or email jmfeth@uncg.edu) You can monitor your performance processes easily by using the colored status tabs at the top of the dashboard. You can also get a quick look at a specific process' name and owner by hovering over the colored step blocks.
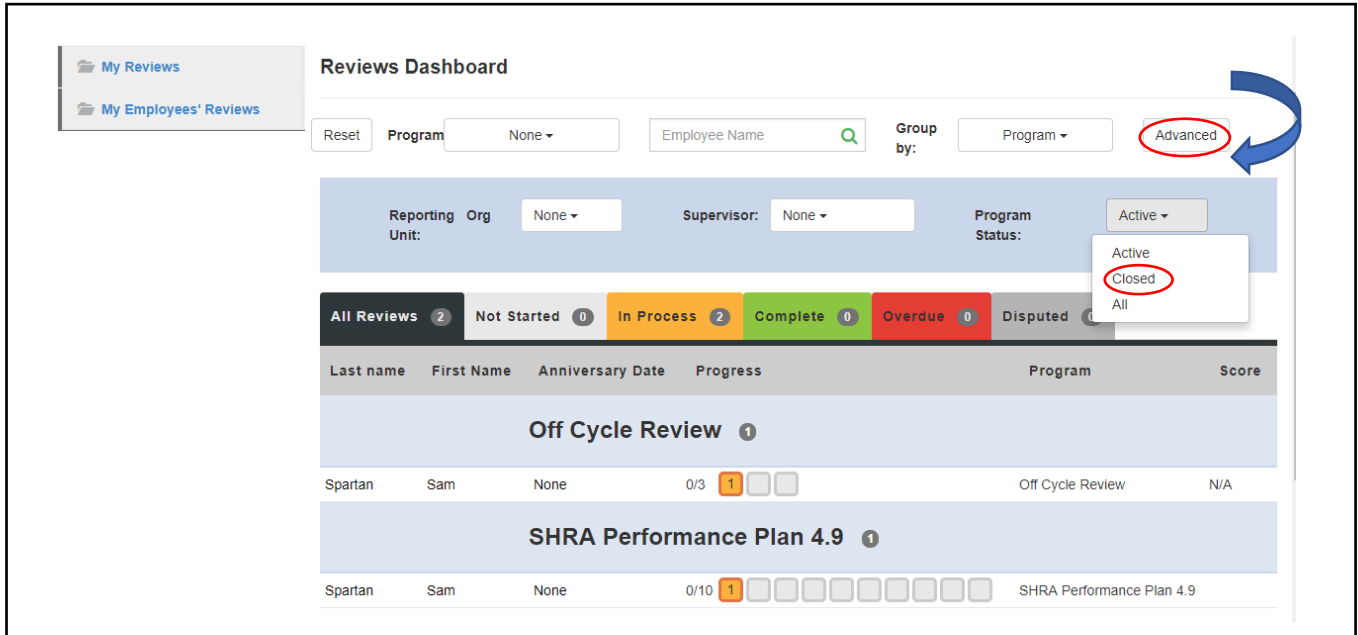
The filter bar at the top of the navigation screen allows you to sort by a specific program, search for a specific employee, and /or group the information by supervisor, reporting unit, etc. The **'Advanced'** filter button gives you more sort options including **'Program Status'**. By setting the 'Program Status' to **'Closed'**, you will be able to access past performance programs which will contain records such as performance plans and evaluations.
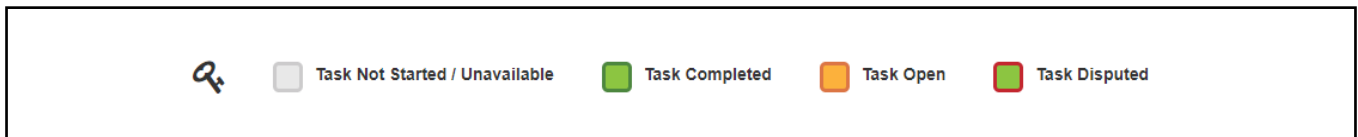

Select the desired employee for a particular program to access the 'Overview' screen. This screen is where you will access the performance records and history.

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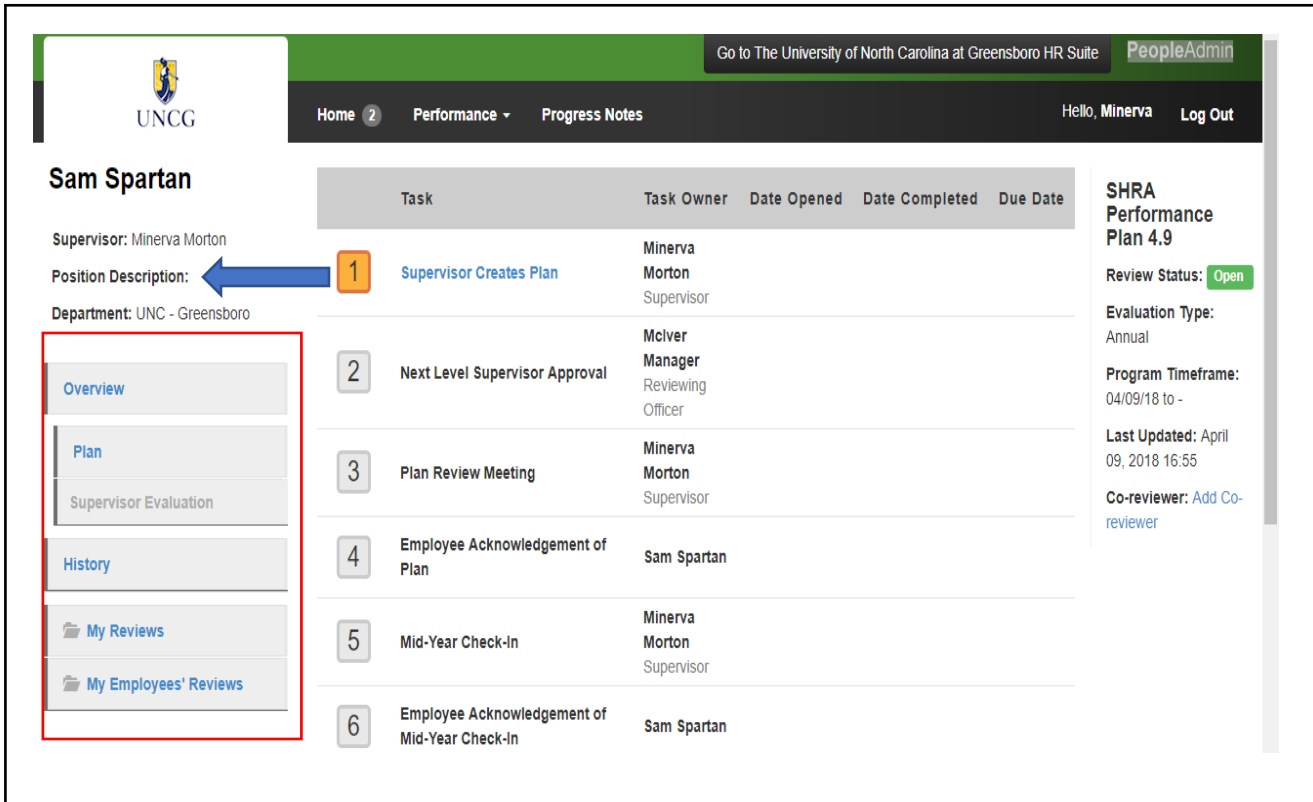
On the left side of the screen you can access any completed or open performance actions **('Plan', 'Supervisor Evaluation'),** and action **'History'.** There are also **'Progress Notes'** at the top of your page that will allow you to keep notes throughout the year. Click the link to access the desired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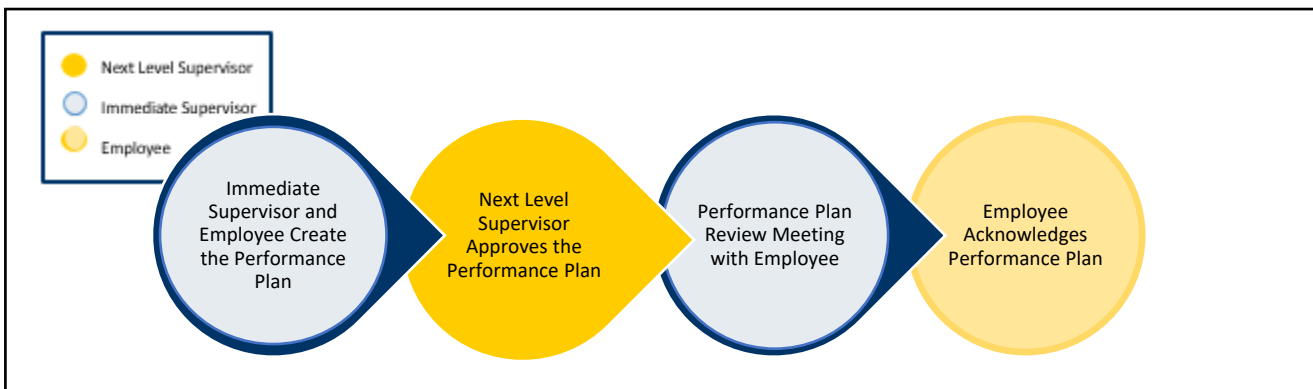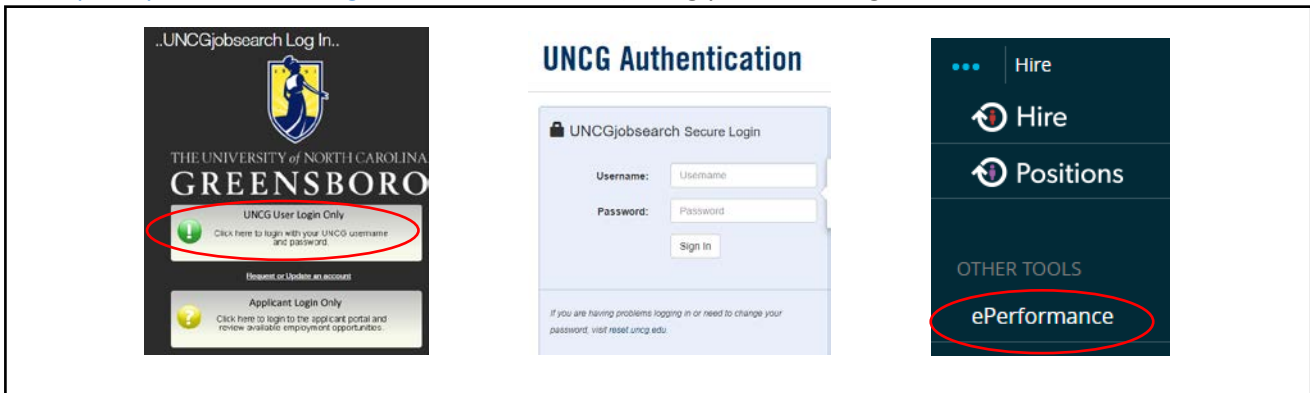

Performance Plan Process Steps

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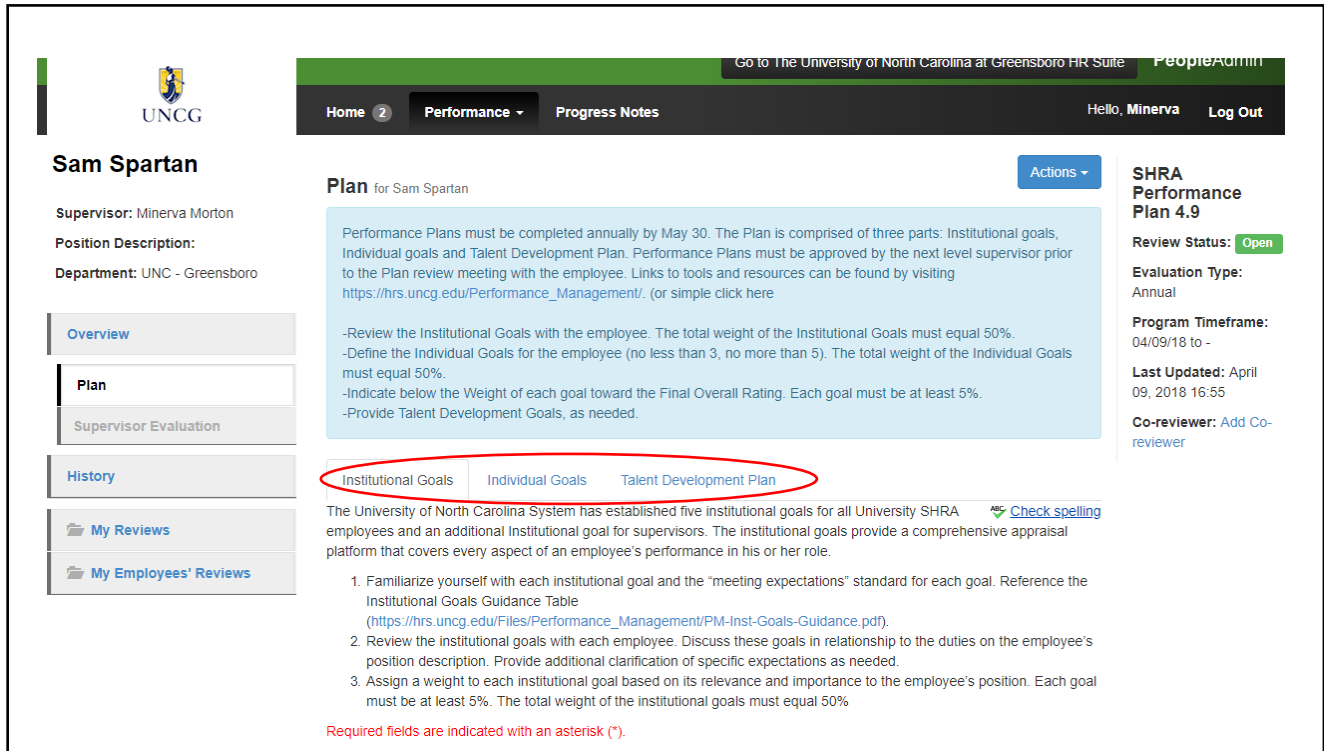
When you reach the UNC Greensboro Employee Portal, the first screen you will see is **'Your Action Items'.** This will be a list of items that require your attention. Note any 'Due Date(s)' indicated.

'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'**.
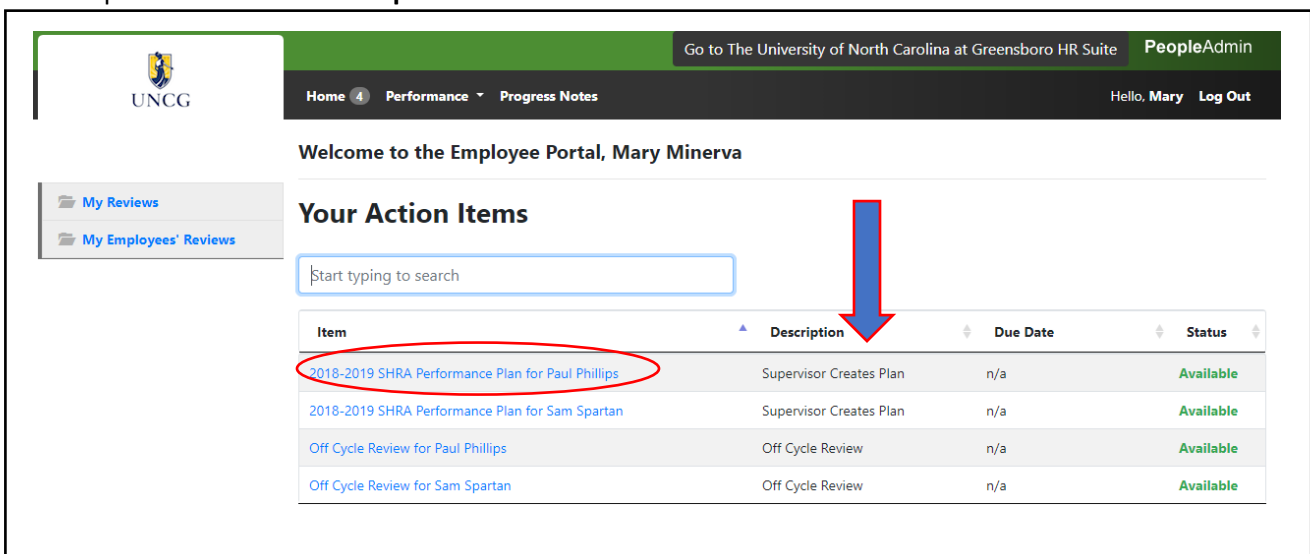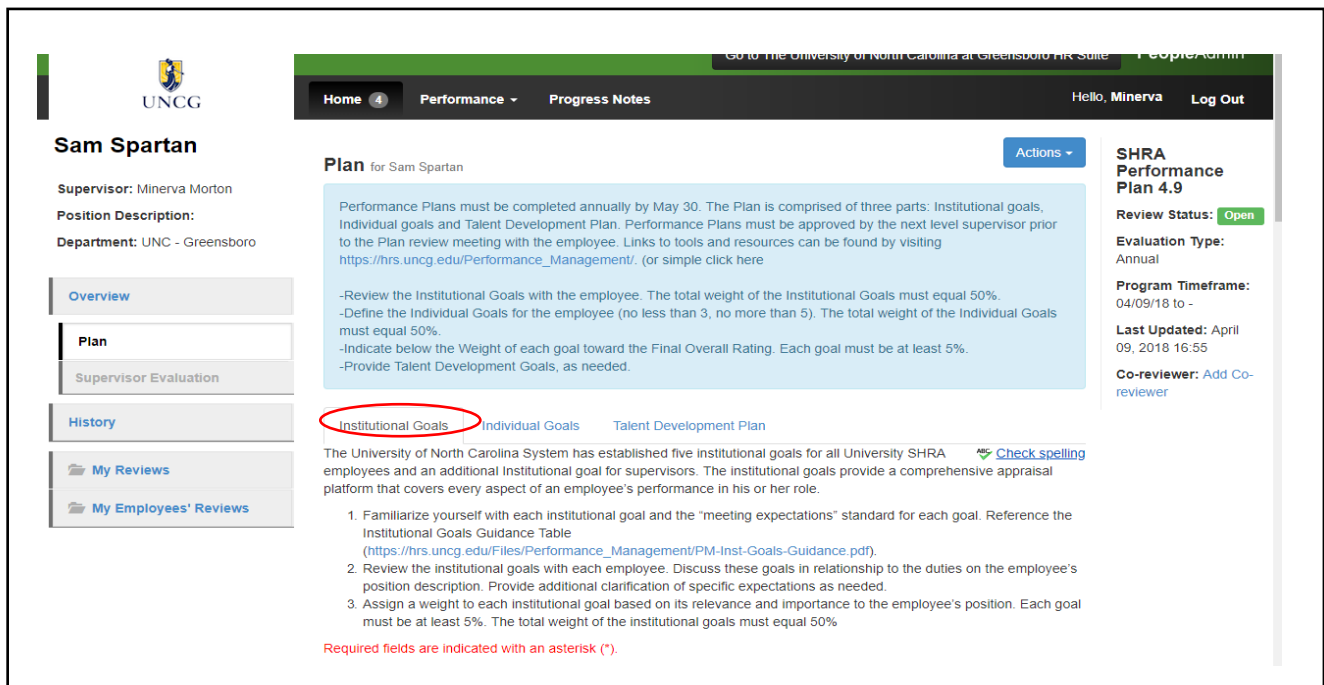

Note! Prior to the beginning of the new performance cycle, and your drafting of the new performance plan, you should sit down with your employee to discuss the department's or unit's strategic goals for the cycle. You and your employee may be able to collaborate on what individual goals and career development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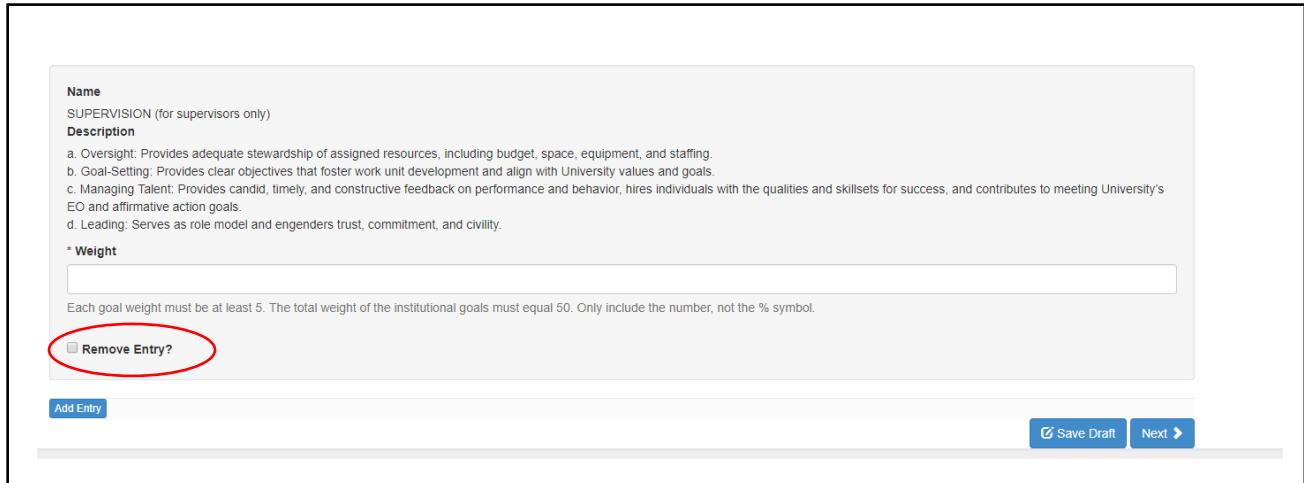

The **first tab** section is titled **'Institutional Goals'.** This tab is where you will enter a percentage weight for each corresponding institutional goal and any specific standards of performance if desired. You will need to provide a percentage weight of no less than 5% for each goal, and all 5 goals (6 goals if supervisor) must add up to 50%
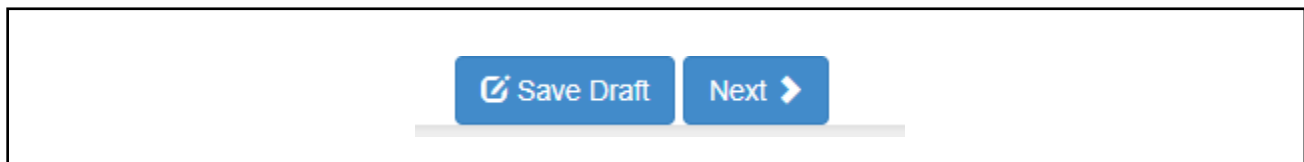
If your employee is NOT a supervisor – be sure to click the **'remove entry'** box at the bottom of the goal and this will take the goal away from the employee in its entirety.

Name

SUPERVISION (for supervisors only)

Description

a. Oversight: Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing.
b. Goal-Setting: Provides clear objectives that foster work unit development and align with University values and goals.
c. Managing Talent: Provides candid, timely, and constructive feedback on performance and behavior, hires individuals with the qualities and skillsets for success, and contributes to meeting University's EO and affirmative action goals.
d. Leading: Serves as role model and engenders trust, commitment, and civility.

* Weight

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.

☐ **Remove Entry?**

Add Entry

✔ Save Draft   Next ❯

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).

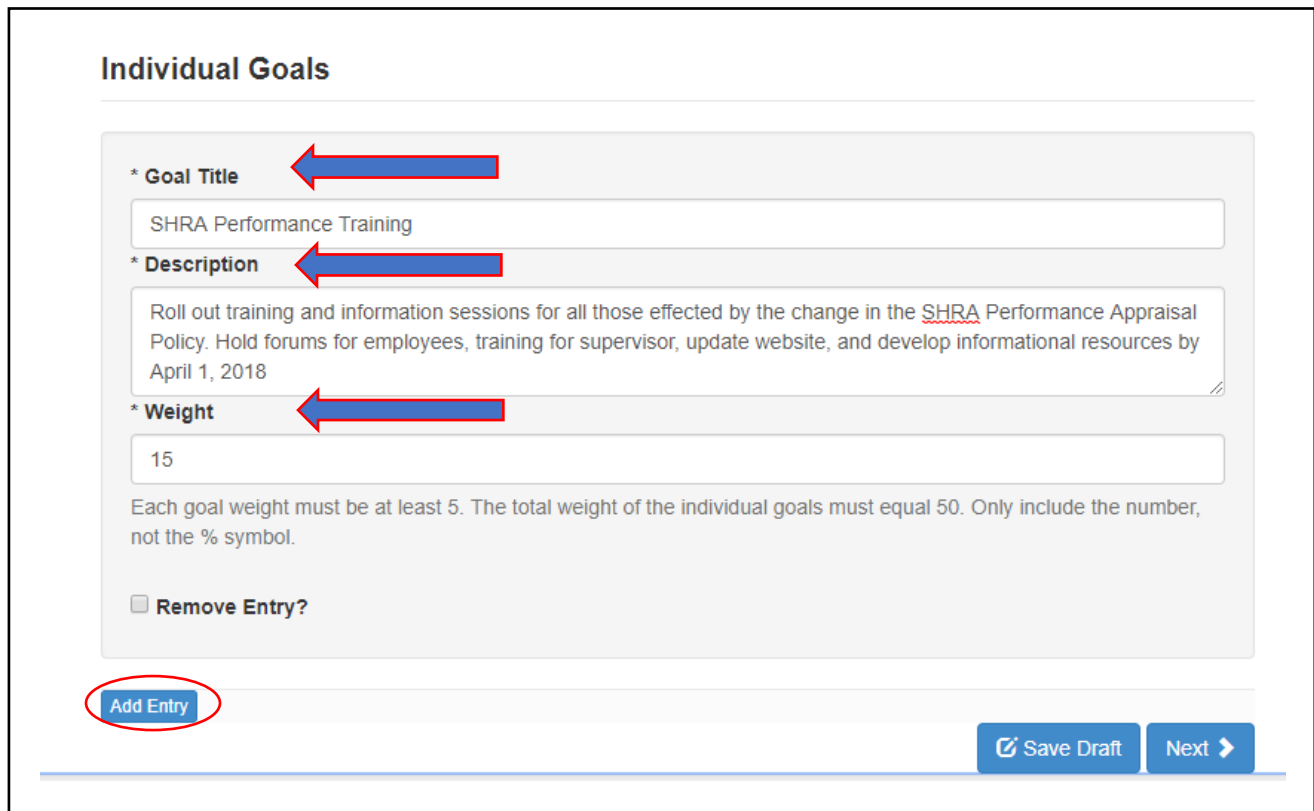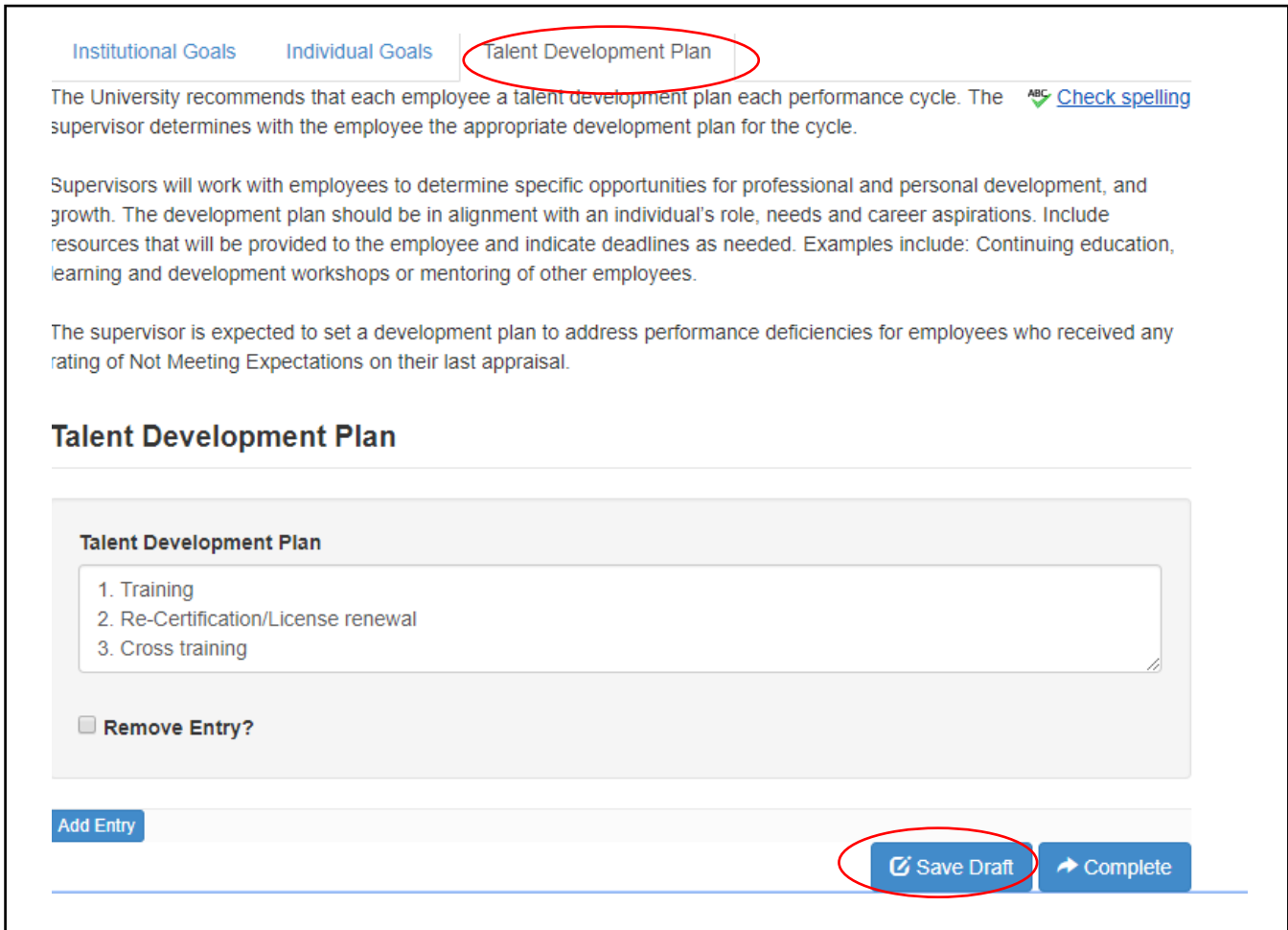✔ Save Draft   Next ❯

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.

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)

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.

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.

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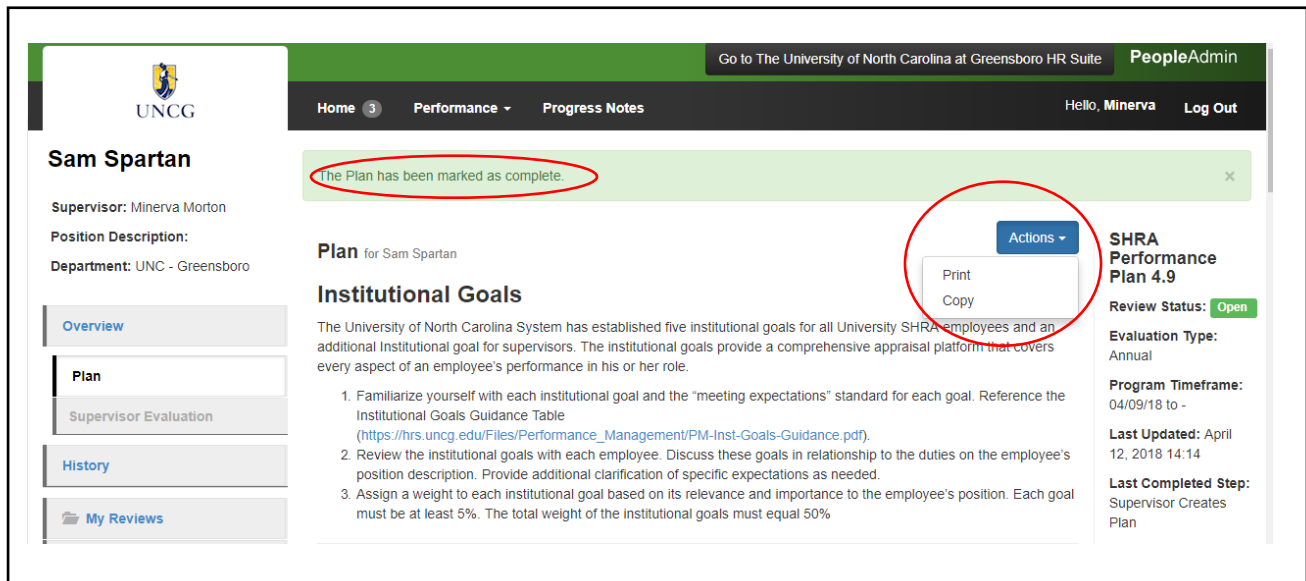
If you would like to copy a performance plan to like positions, go to the section of this guide titled **'Copy Performance Plan to Other Like Positions'**. If you have already clicked the copy button as depicted above, you should start from this point in the directions below.

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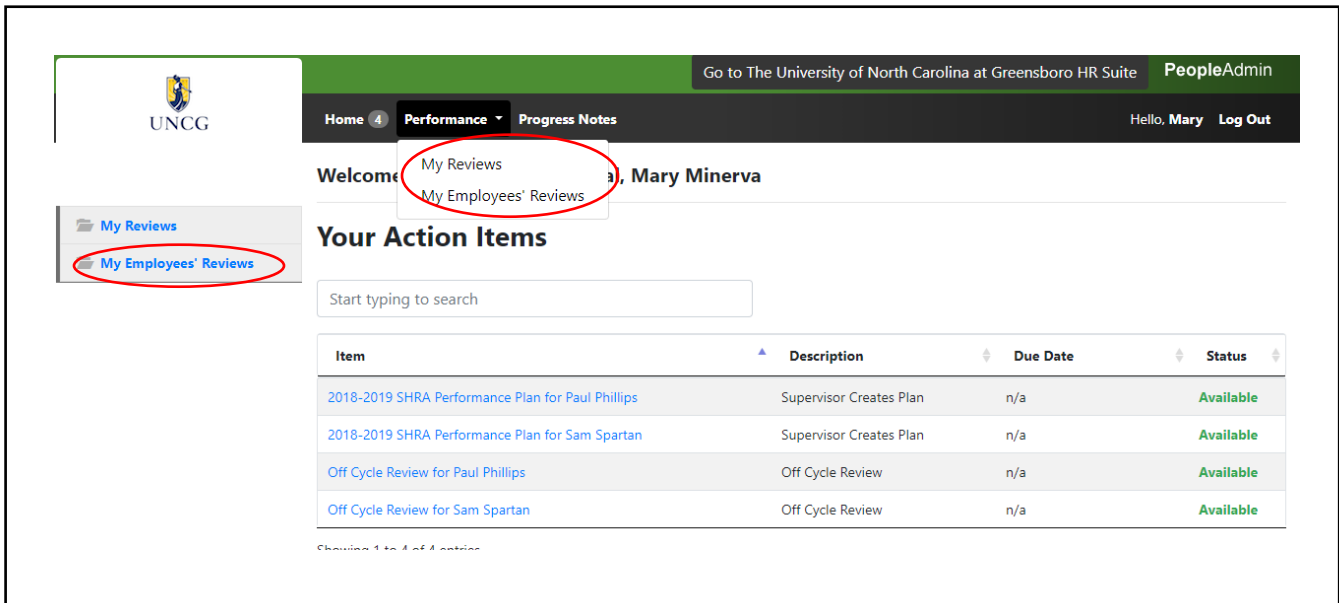
To copy a SHRA Performance Plan, log into SpartanTalent e-Performance Management (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.

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.

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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'

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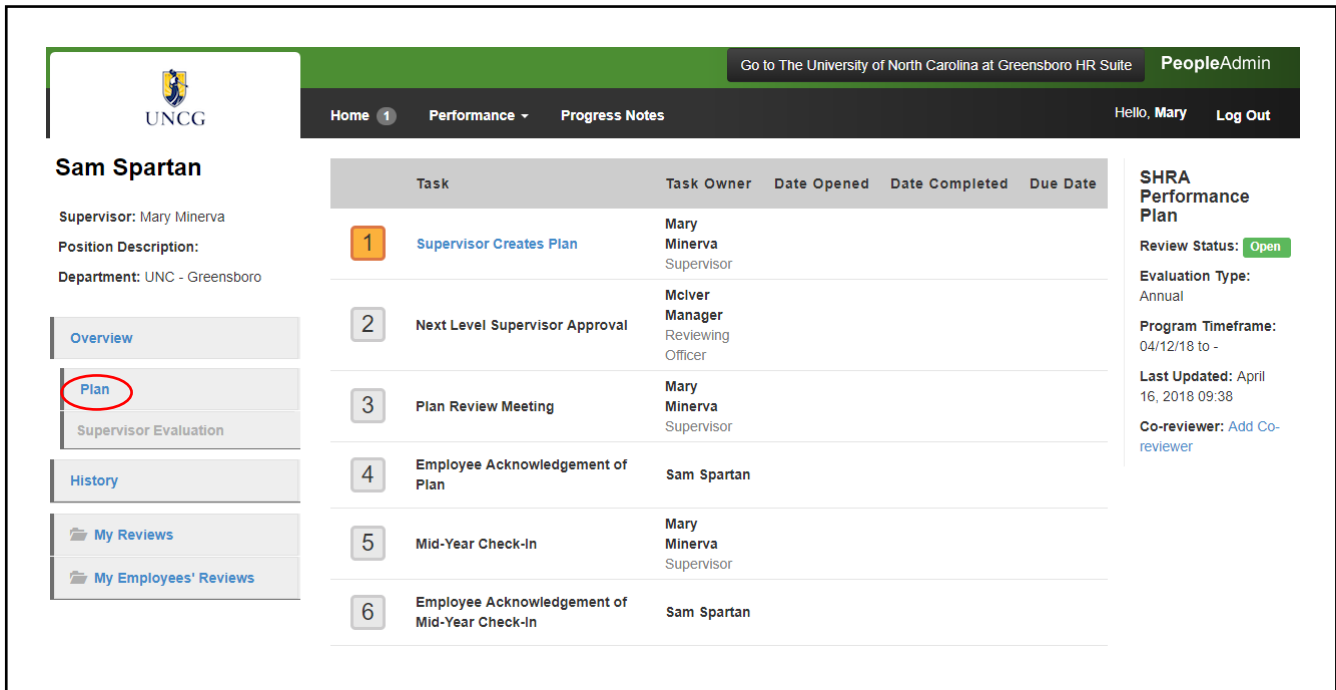
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You can view any completed or open item from the 'Overview' screen at any time. In this case, to begin copying this employee's Performance Plan, click on the **'Plan'** link in the left navigation.

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

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

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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.

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

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

16
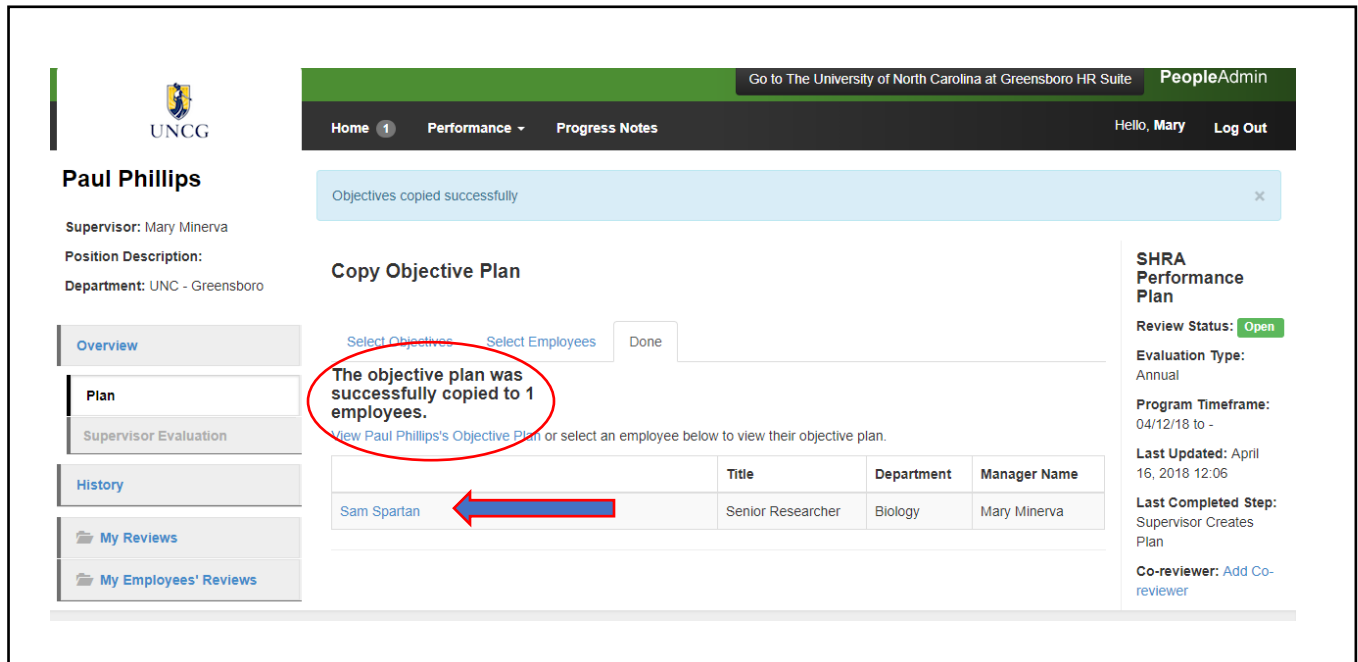
For this reason, it is **not recommended** that you select/click the box that reads **'Copy Plan to selected employees and complete the associated step…'** Click the **'Copy Objective Plan'** button to proceed.

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

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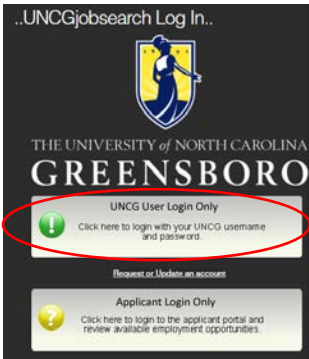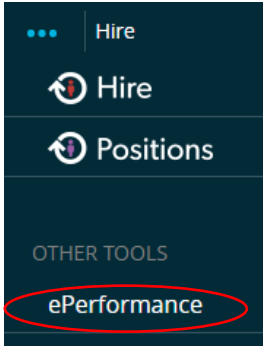
Once the Supervisor has completed the Performance Plan, this information will route immediately to the Next-Level Supervisor for consideration/comments.

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.

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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'**.

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.)

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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.

If you attempt to 'Return' the action without writing a comment in the box, you will see the following:
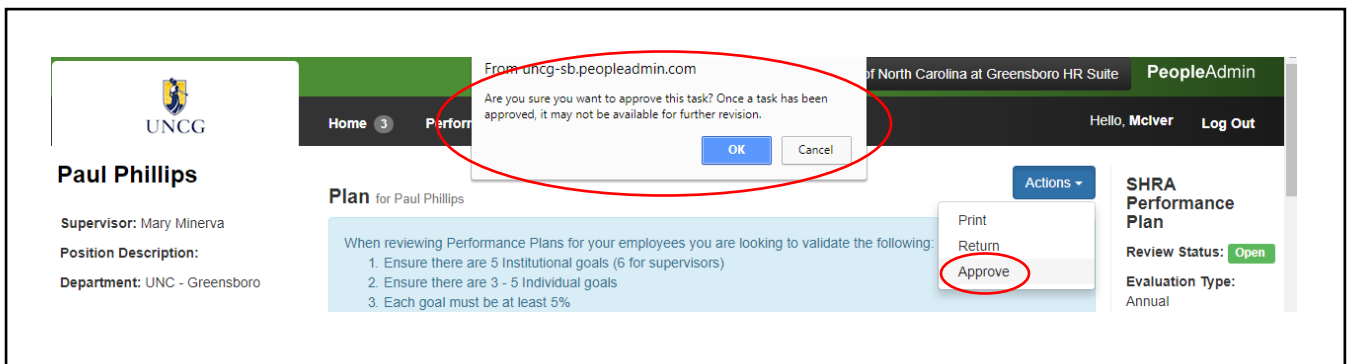
When you click the 'Approve' button the system will always ask you if you are sure you want to complete the action requested. Click **'OK'** only when you are sure you are finished with approving the plan creation. If you complete the action before you are done approving the plan, the action can only be re-opened by a HR administrator.

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.

Completing the Supervisor/Employee Performance Plan Meeting

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.

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.)

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.

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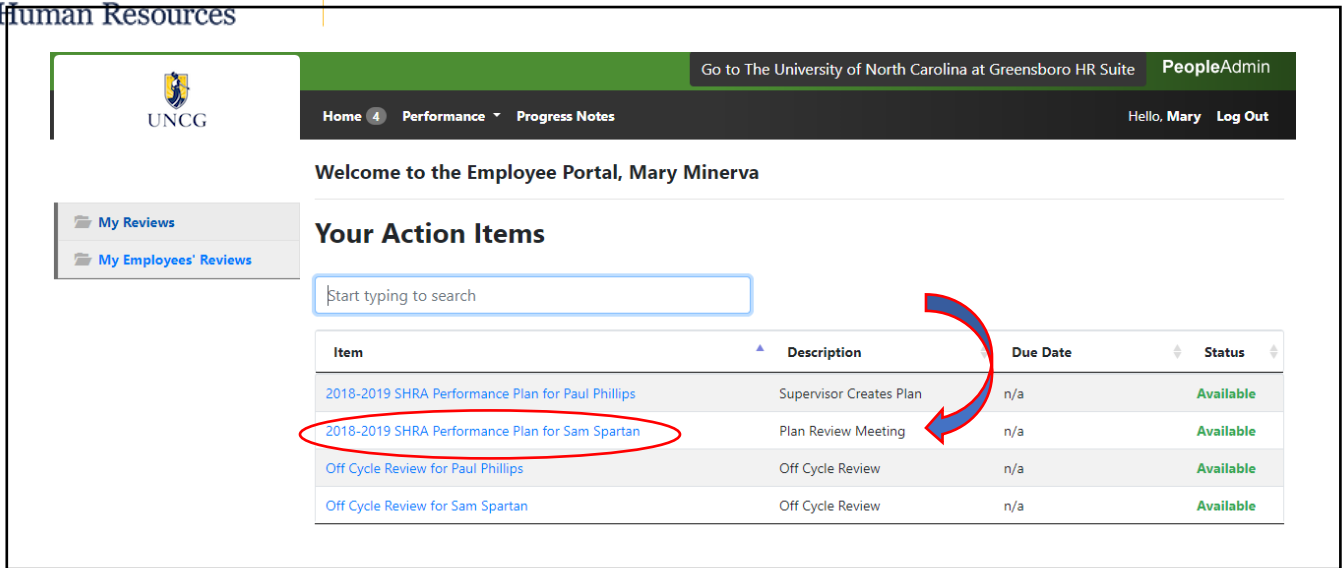
Mid-Year Check-In

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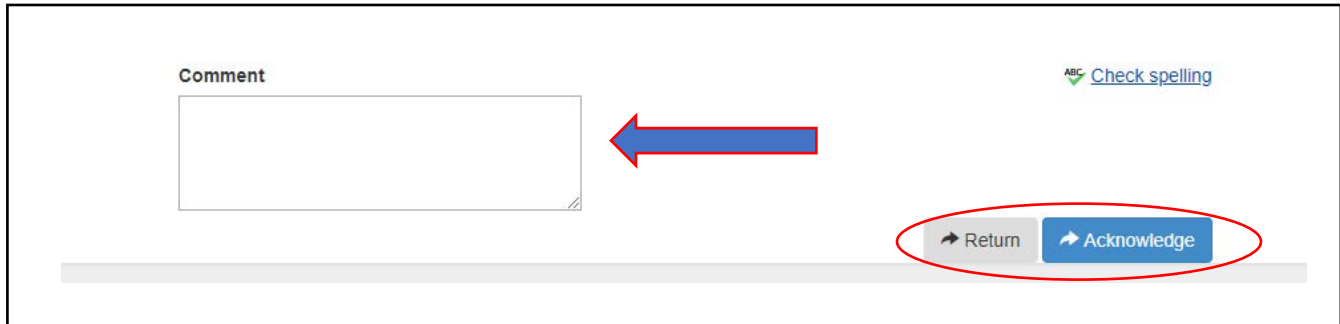
Once selected, use the comment section at the bottom of the page to assess the employees progress as "Meeting Expectations" feedback outlined in the performance plan.

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.
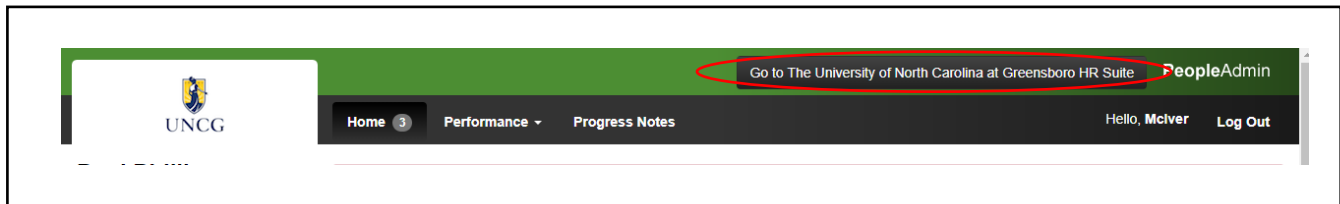
Revise Performance Plan

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.
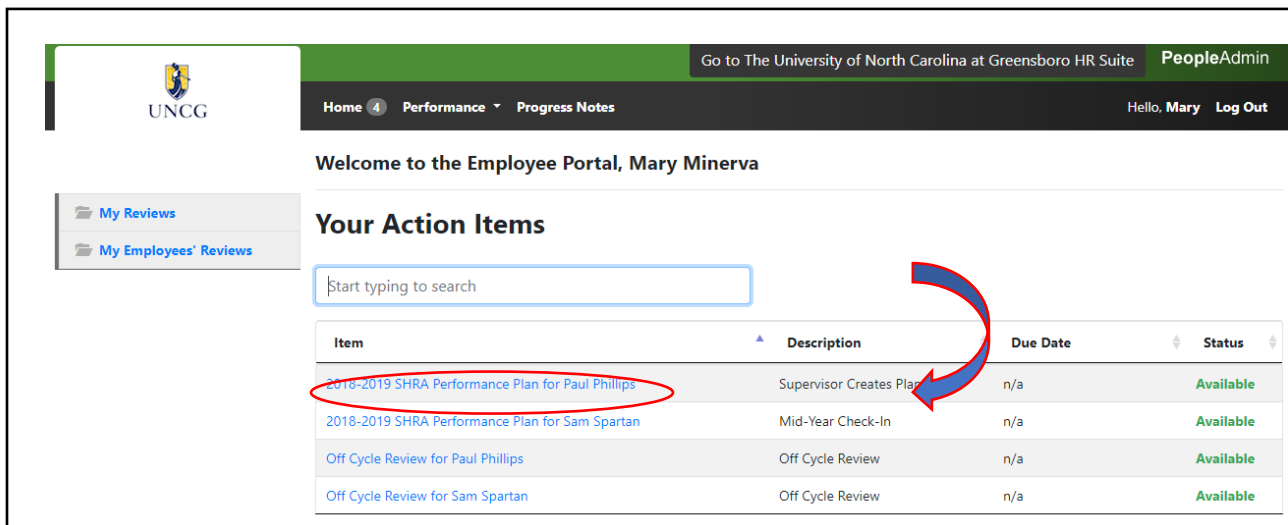

Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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 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.

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

Once selected, the following screen will appear. Choose the blue box labeled '**Create Progress Note**' to bring up the 'New Progress Note' box.
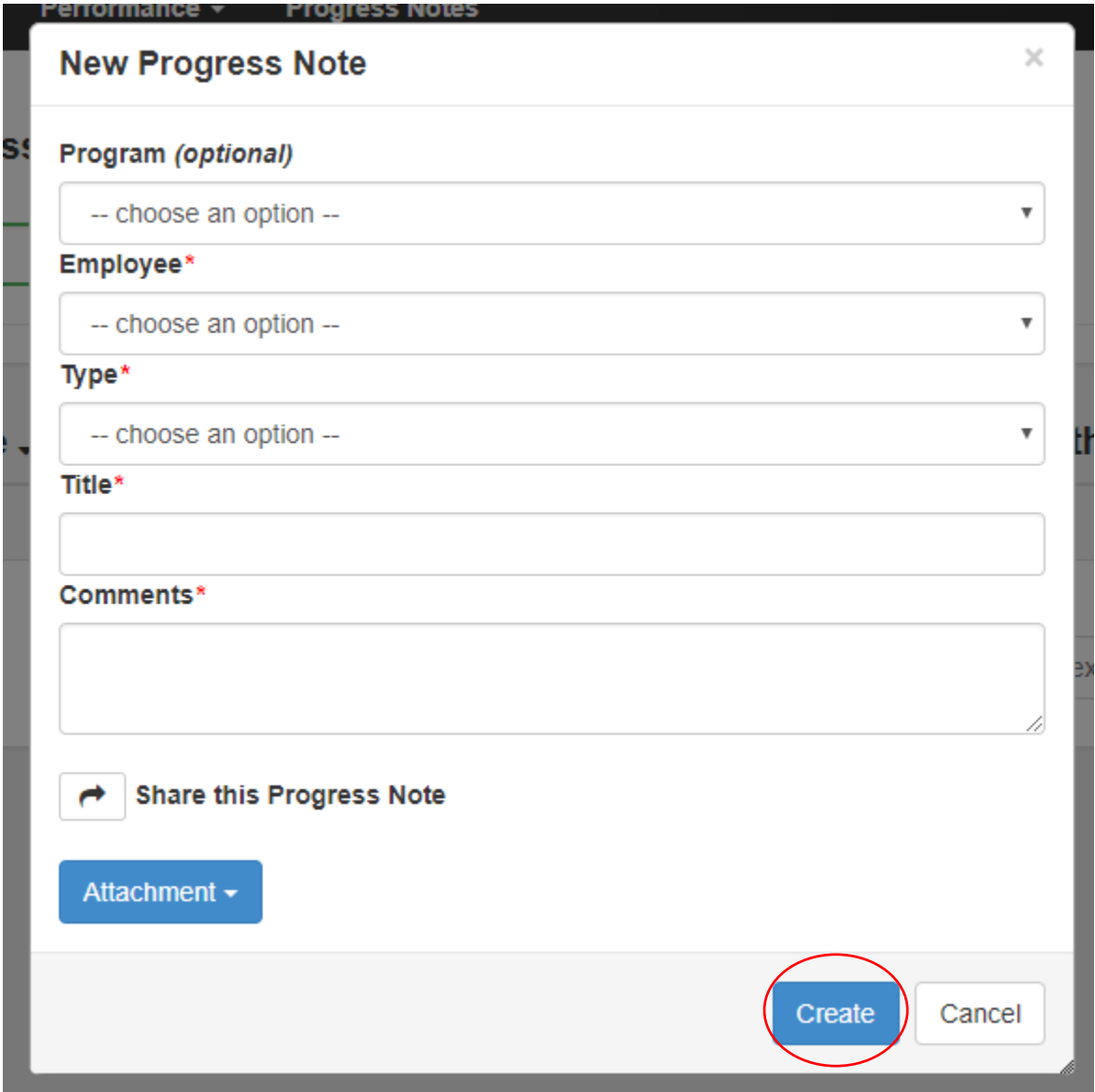
The progress notes box will ask you what program you wish to create the progress note for such as EHRA or SHRA. Required fields are '**Employee**', only one employee can be chosen at a time, so if you are entering progress notes for an entire team, they will be done individually. **'Type'** of progress 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.

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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).
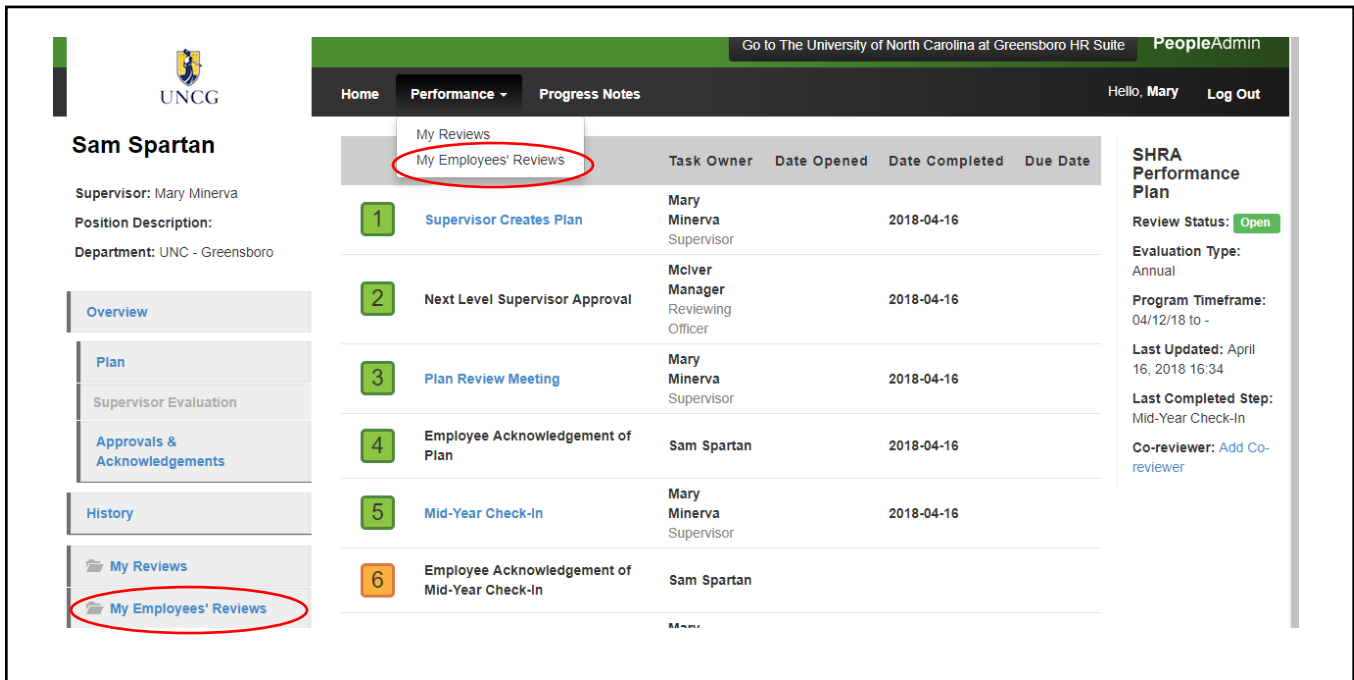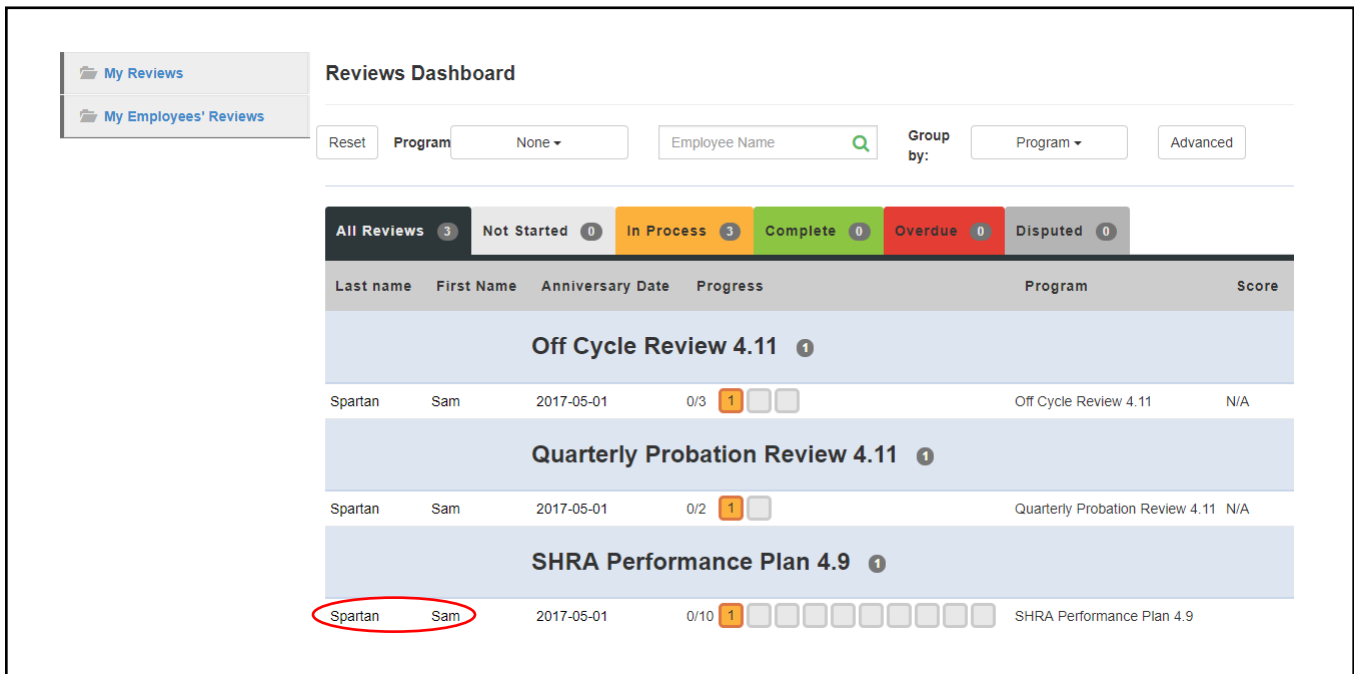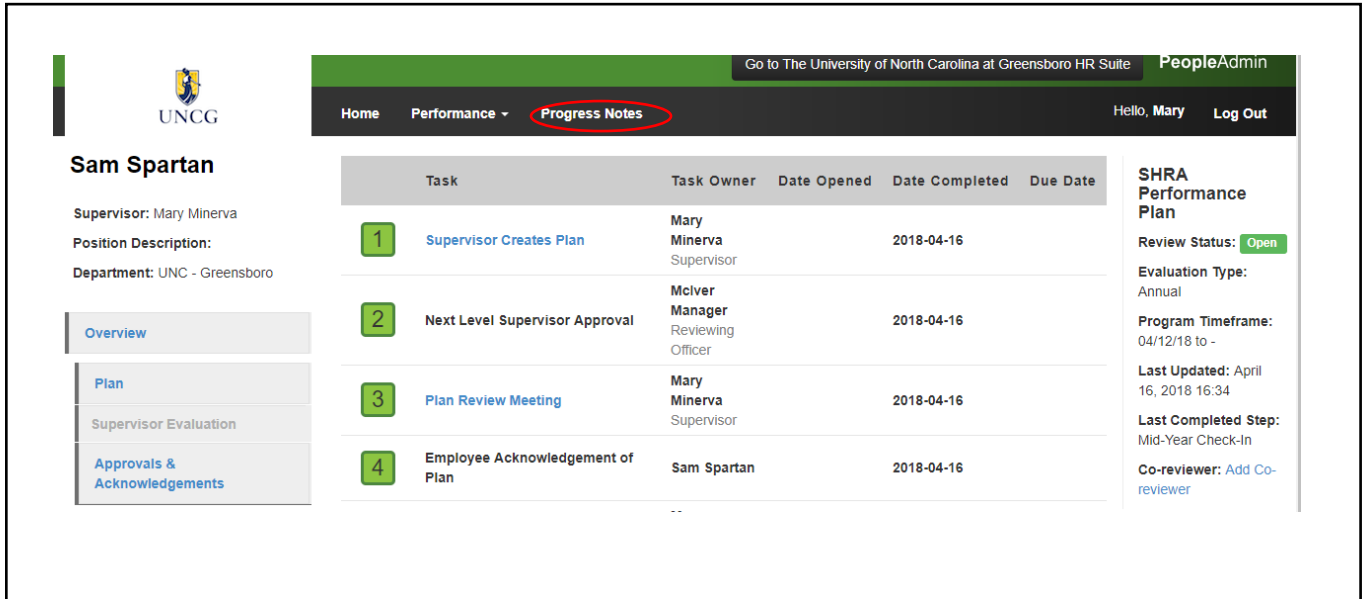

When you are finished with adding your comments or supporting documentation, click the '**Create**' button at the bottom of the screen and you will see that your comments have been saved and will either be private to you or shared with your employee.
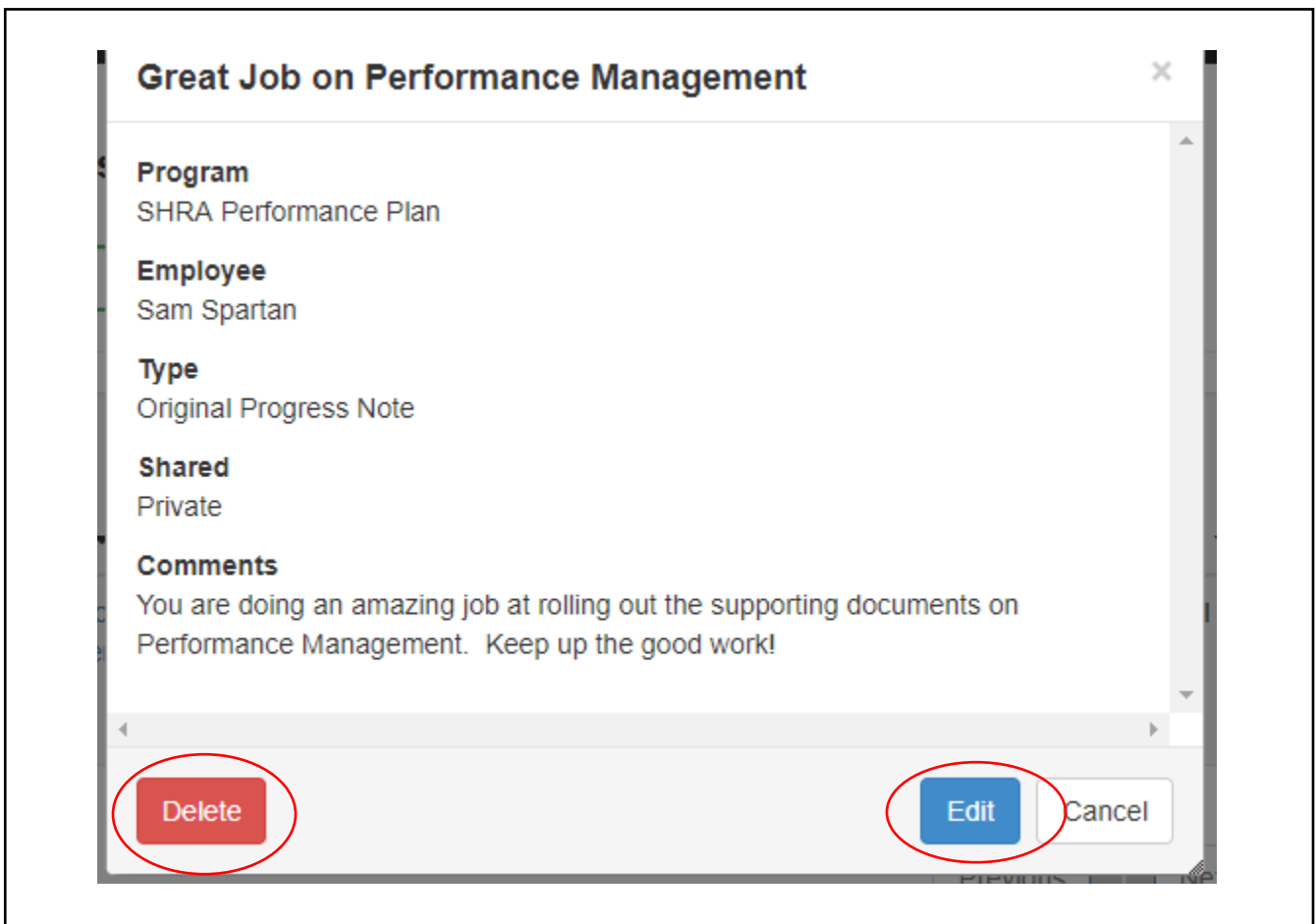
You may refer to your Progress Notes at any time by choosing the Progress Note drop down box and then highlighting the note you choose to review below. Once you have chosen the Progress Note, you can **'Edit'** or **'Delete'** the note at any time you wish.

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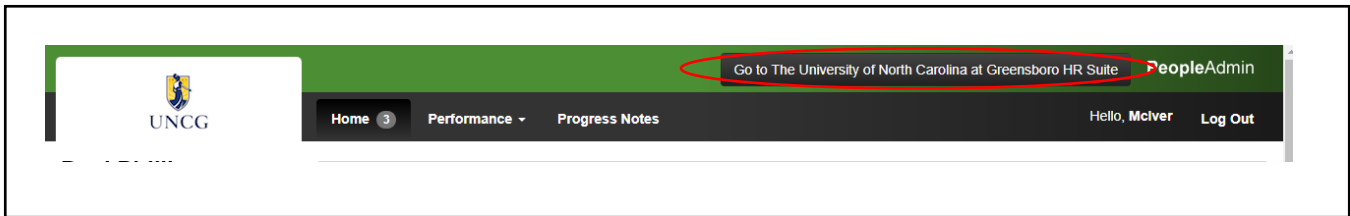
Annual Review Process Steps for Supervisors

Note: Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your employee appraisals.
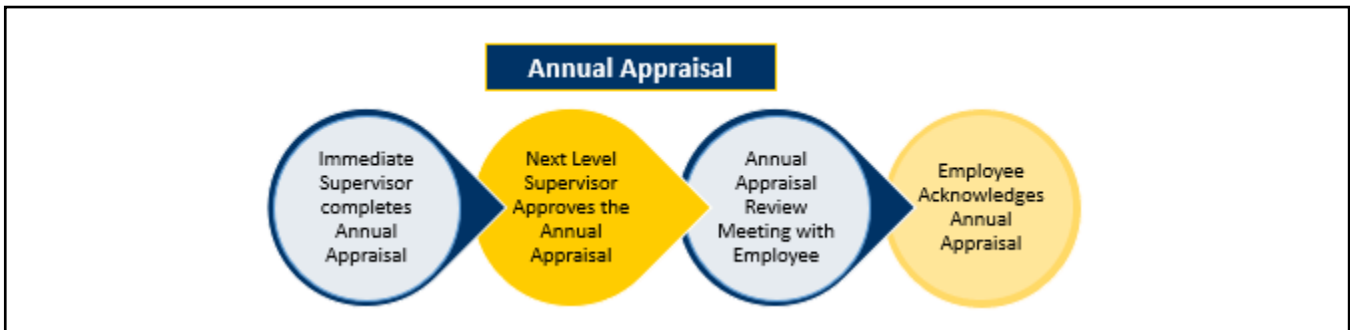
Supervisor Appraisal
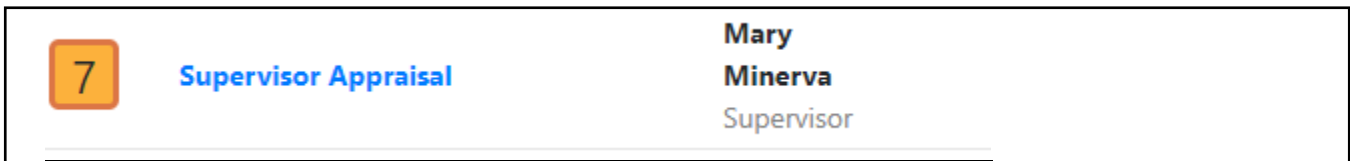
To begin the Supervisor Appraisal process, log into SpartanTalent ePerformance Management at (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.
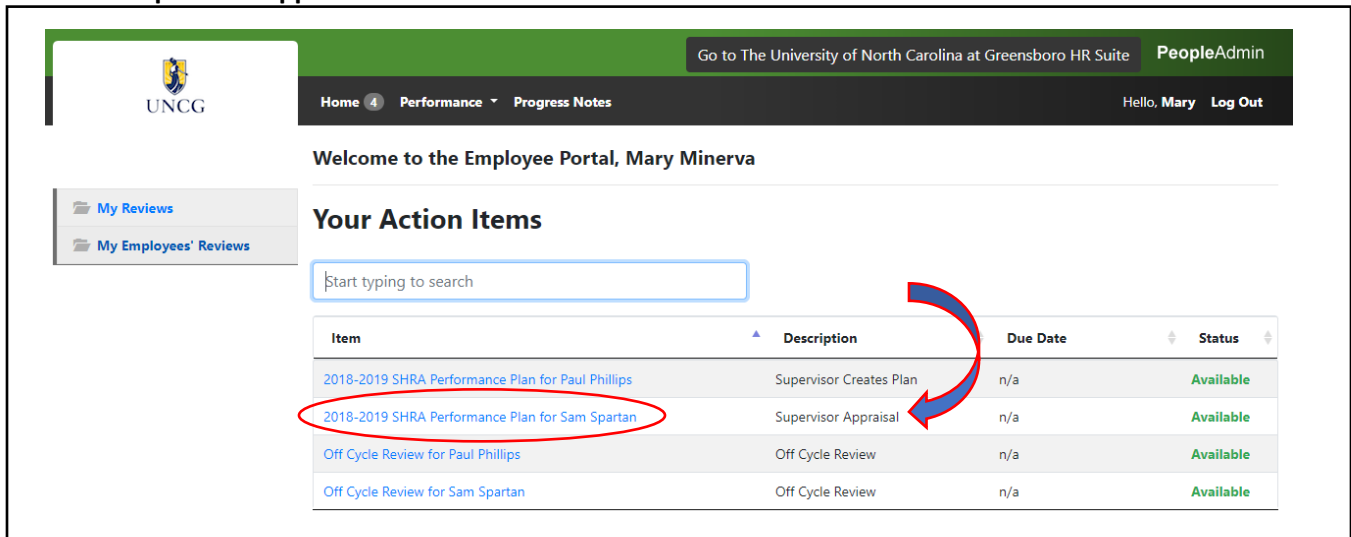
Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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

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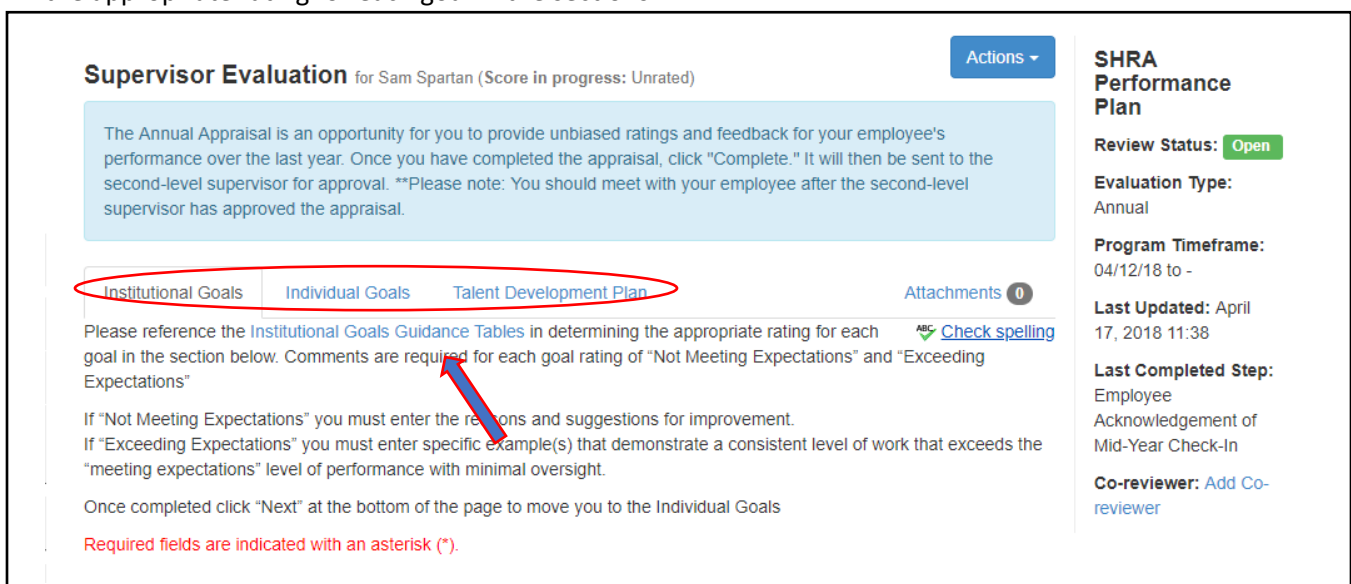
Once selected, the Supervisor Evaluation will appear. There are **three (3) tab sections** across the top of the Supervisor Evaluation.

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.

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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:

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* 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.
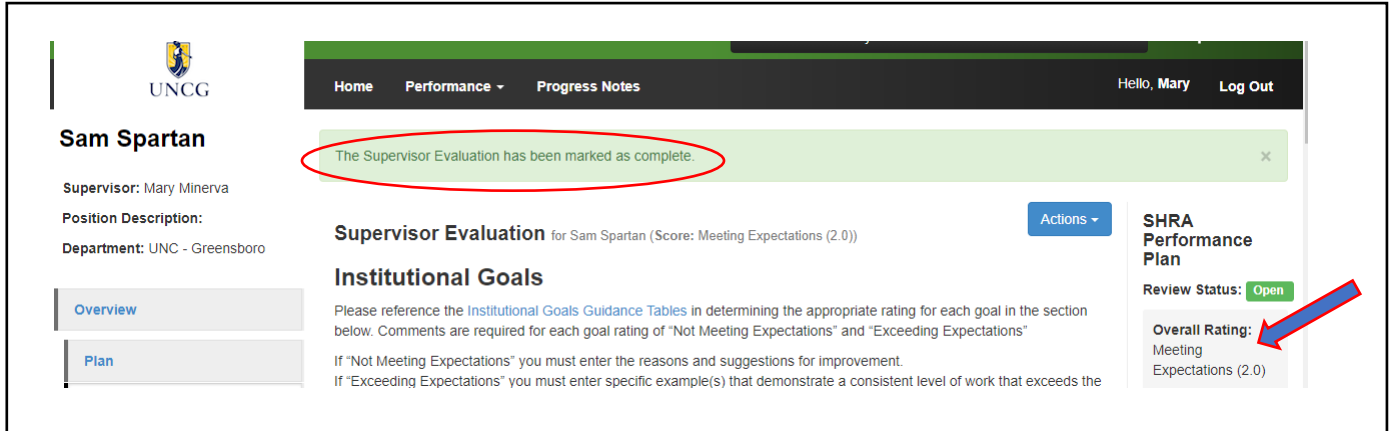
From uncg-sb.peopleadmin.com
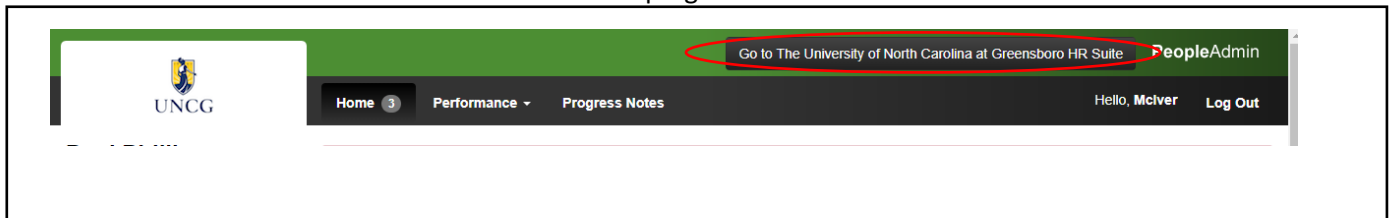
Are you sure you want to complete this supervisor evaluation?

[OK] [Cancel]

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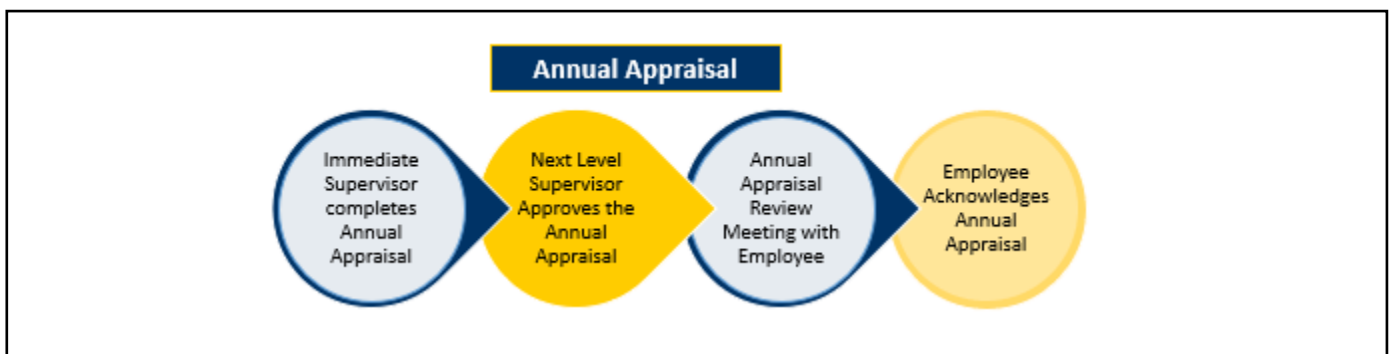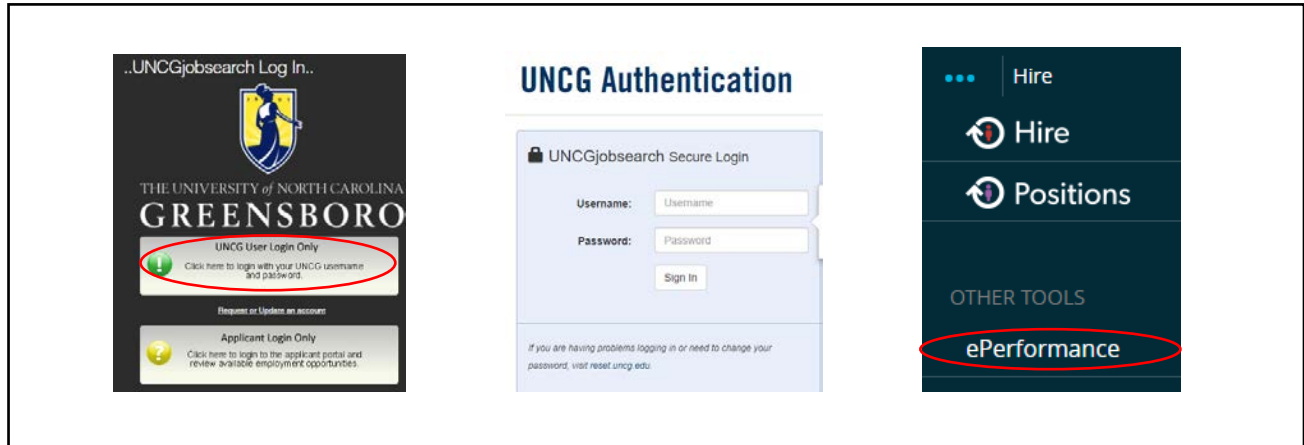
Once the Supervisor has completed the Supervisor Appraisal, this information will route immediately to the Next-Level Supervisor for consideration/comments.

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

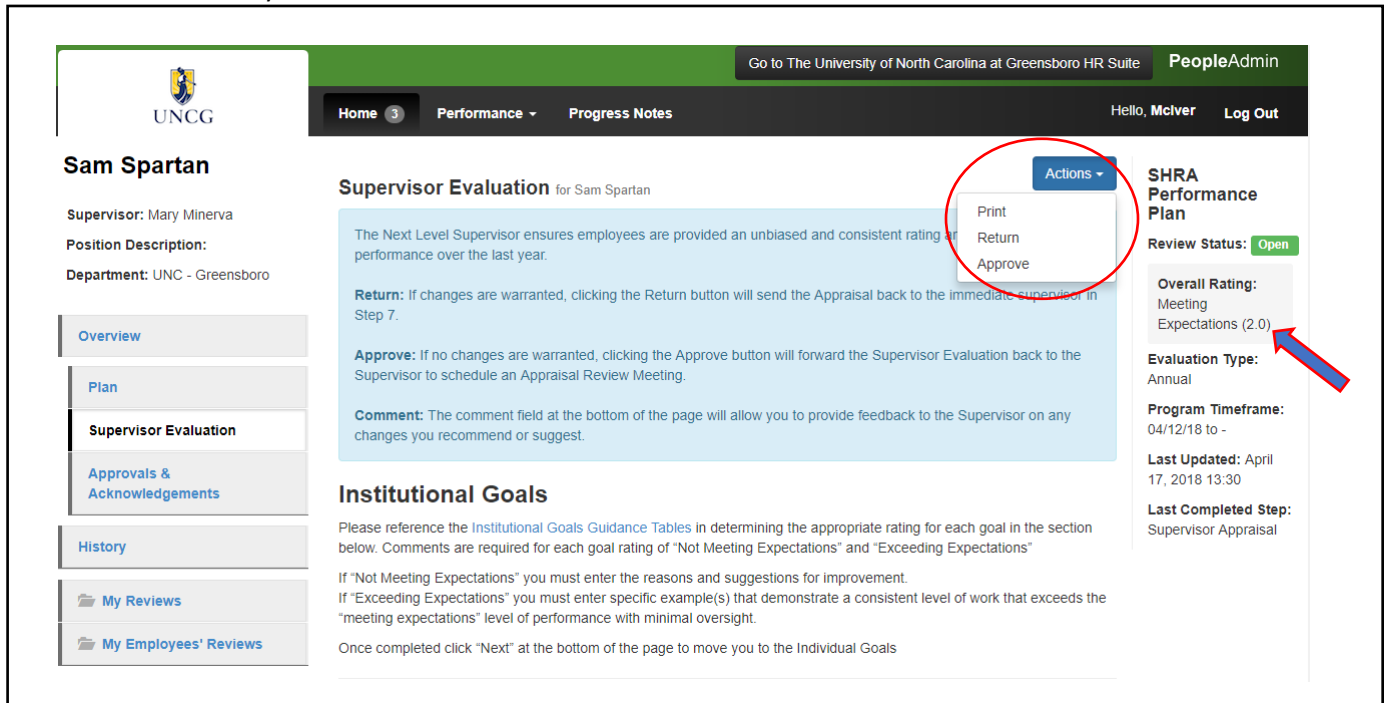**Note, you can access this link from any module and log in as any user type.**

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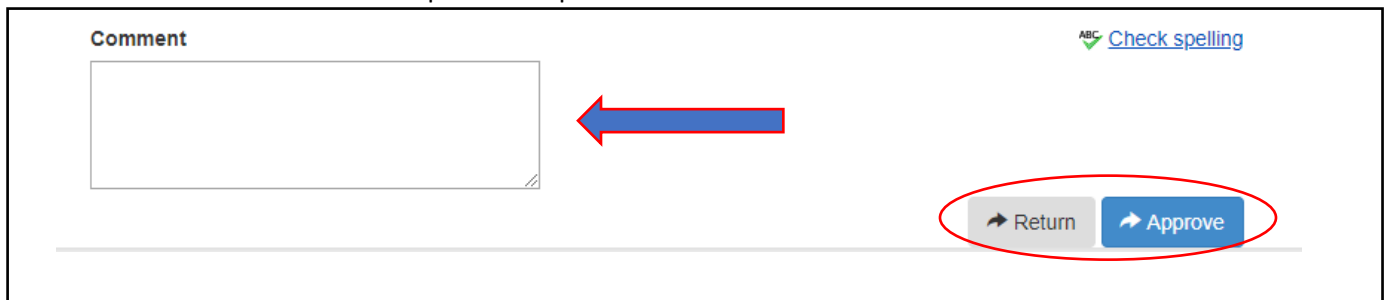
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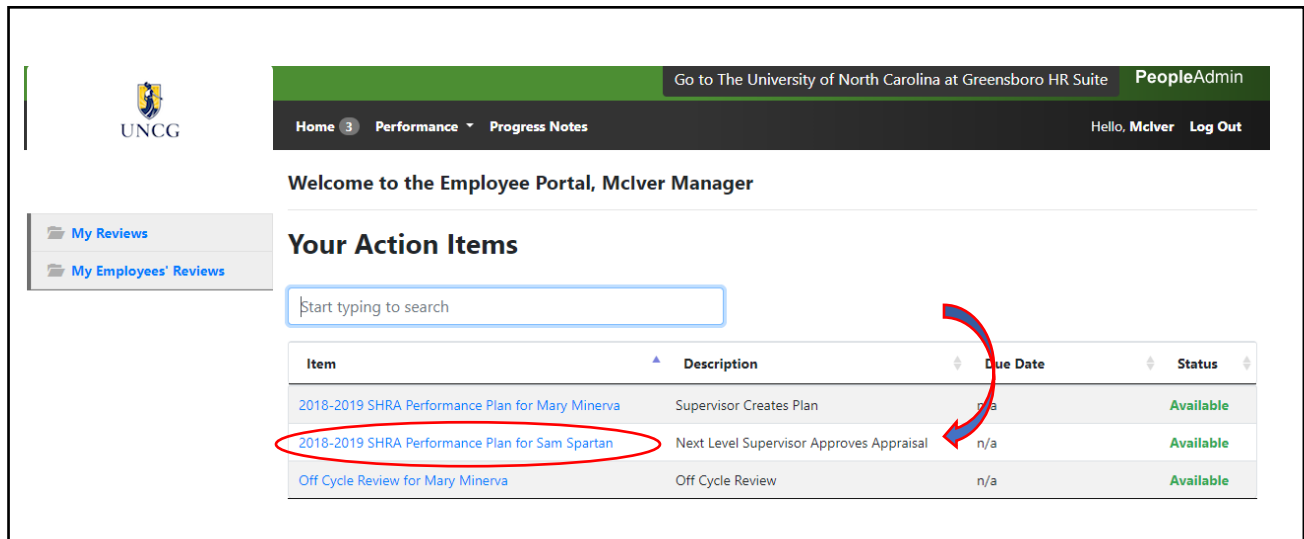
Remember! You should be reviewing the appraisals to make sure your supervisors have done the following:

- 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.
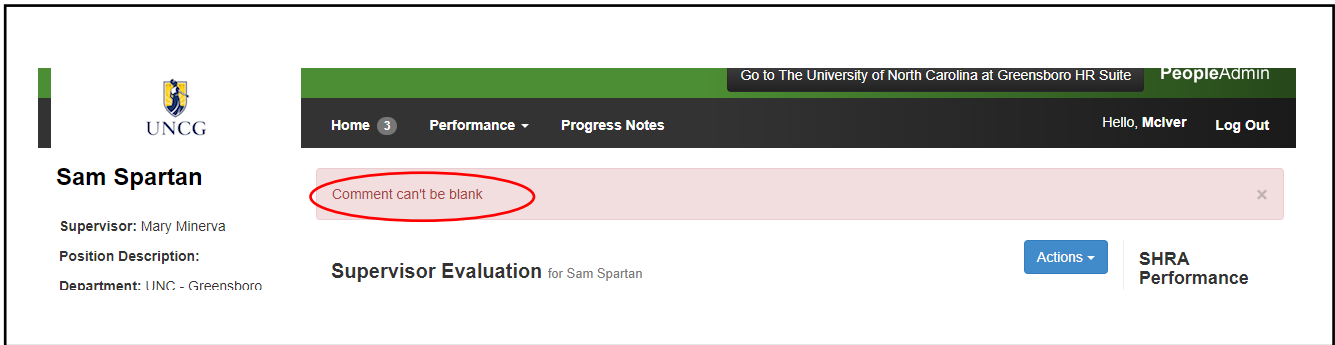

Once your review of the appraisal has been completed, you may either approve or return the appraisal. Choosing the **'Approve'** action indicates your concurrence with the Ratings and Comments, as well as your assurance that all required information is completed and included. Choosing the **'Return'**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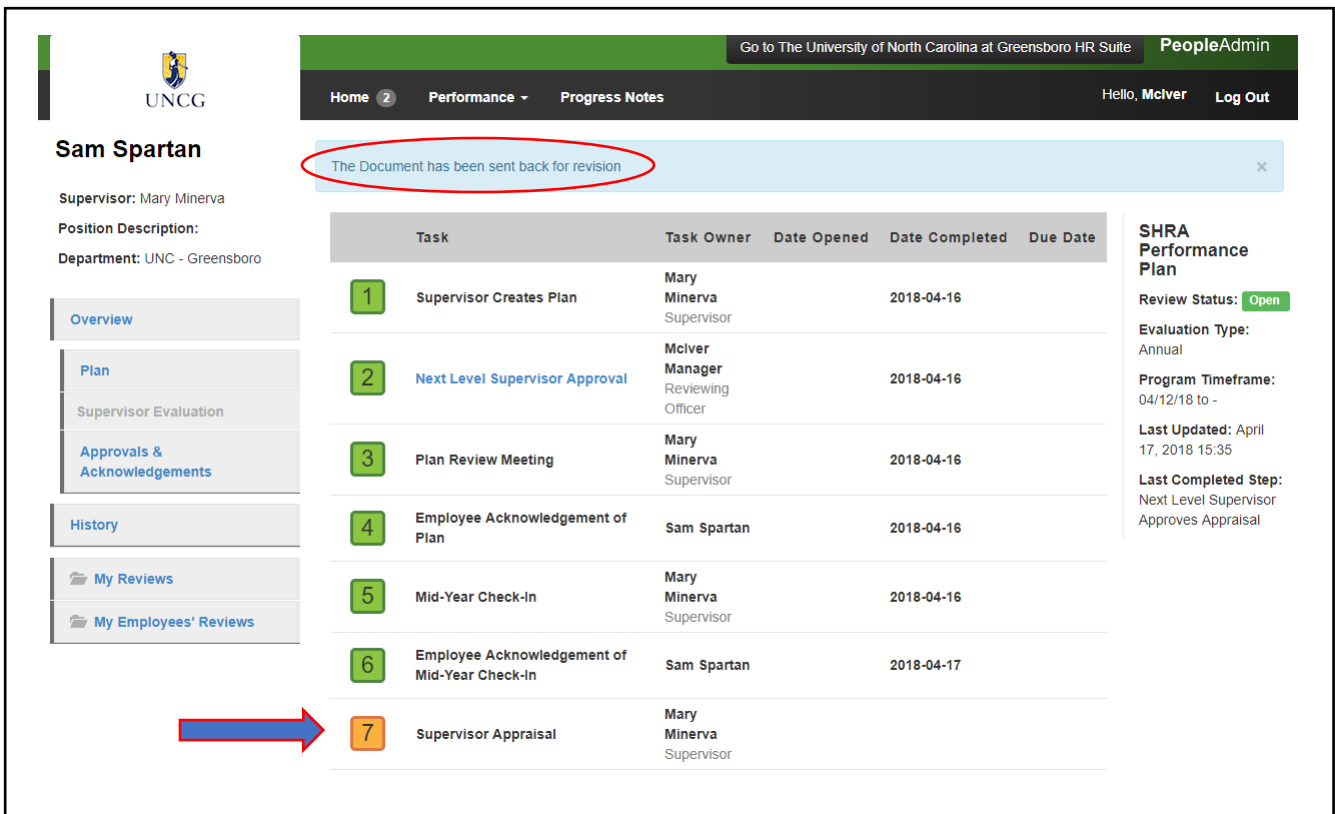

Note: The Next-Level Supervisor should ensure that all required information- Comments, Performance Improvement etc. is completed prior to making the Supervisor Appraisal as **'Approved'**. If items are missing, please say what actions need to be completed in the comment box and choose the **'Return'**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

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

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.
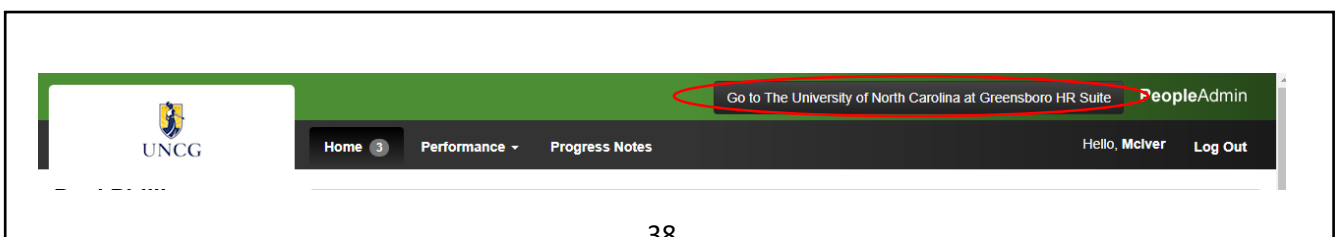

To return to the SpartanTalent ePerformance Management site, click the **'Go to the University of North Carolina at Greensboro HR Suite'** button in the top right- hand corner.

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Supervisor/Employee Appraisal Discussion

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

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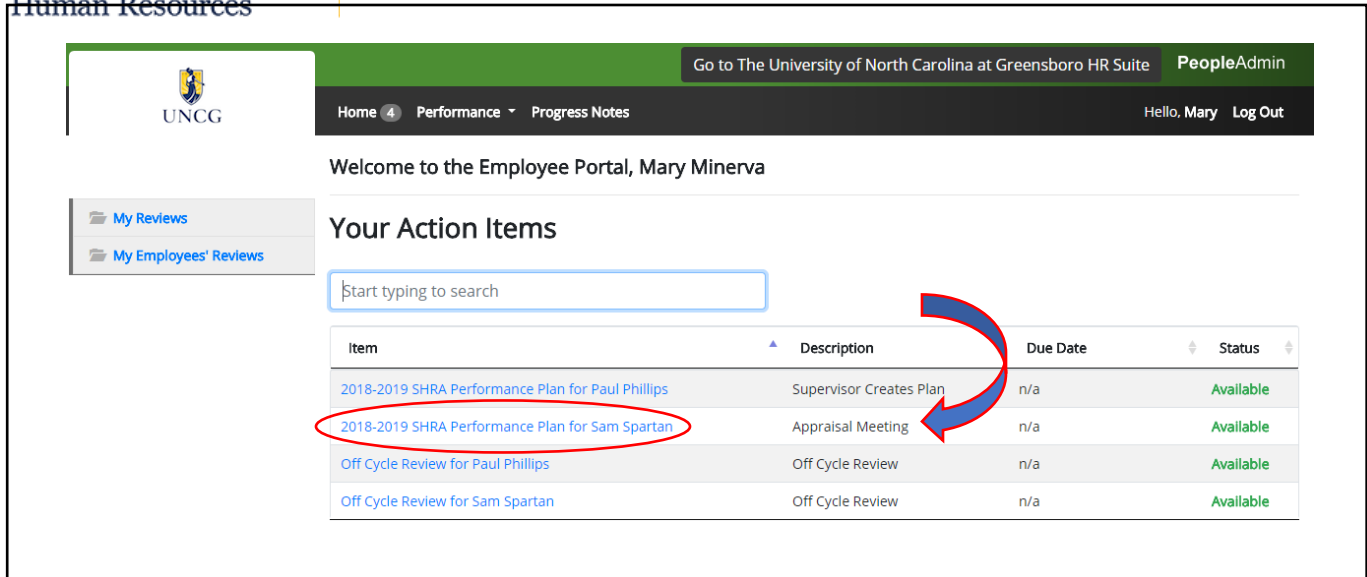

Once logged in, click the **'Go to ePerformance'** link in the upper left-hand corner of your page

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

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

'Item' indicates the review type (Annual, Off-Cycle etc.). **'Description'** indicates the current process step and/or required action. To indicate that the Supervisor/Employee Evaluation Discussion has been completed, select the description title that reads **'Appraisal Meeting'**.
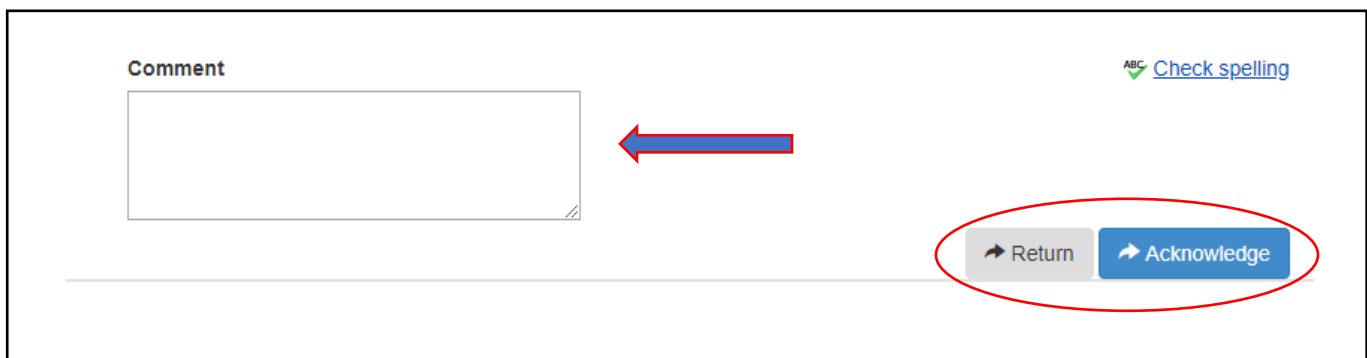
Clicking the employee name next to 'Appraisal Meeting' will bring up the Supervisor Evaluation. Use this opportunity to have a meaningful conversation with your employee. Recognize accomplishments and/or identify developmental needs.

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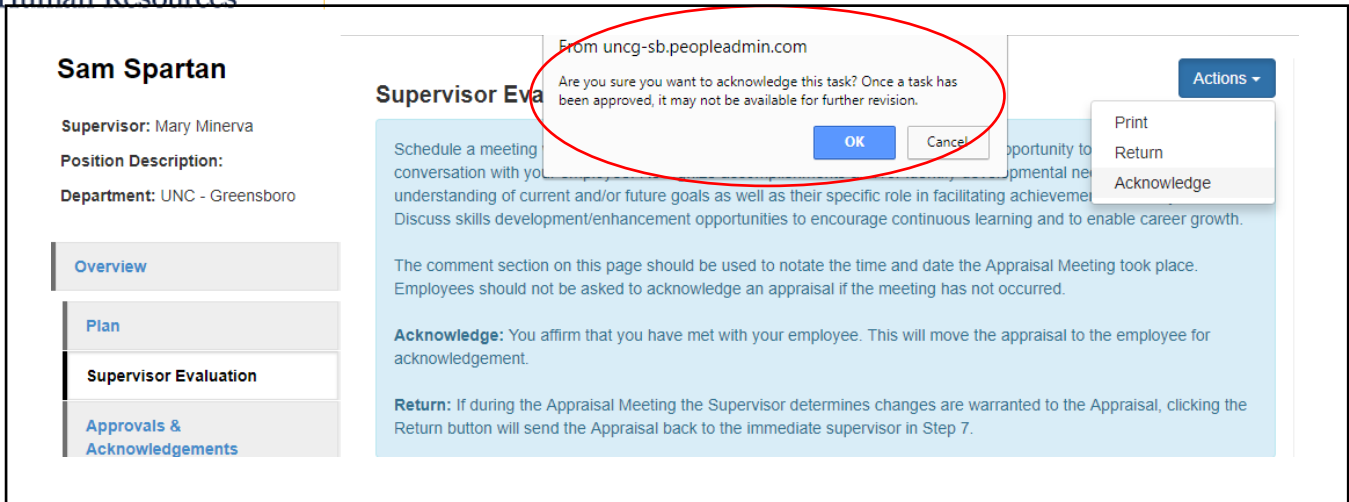
Return: If during the Appraisal Meeting the Supervisor determines changes are warranted to the Appraisal, clicking the **'Return'** button will send the Appraisal back to the immediate supervisor in Step 7.

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.

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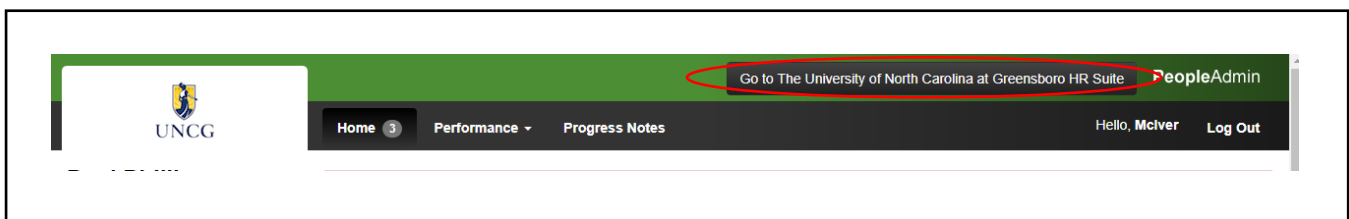

The last step in this appraisal process is the **'Employee Acknowledgement of Appraisal'**.

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.

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.
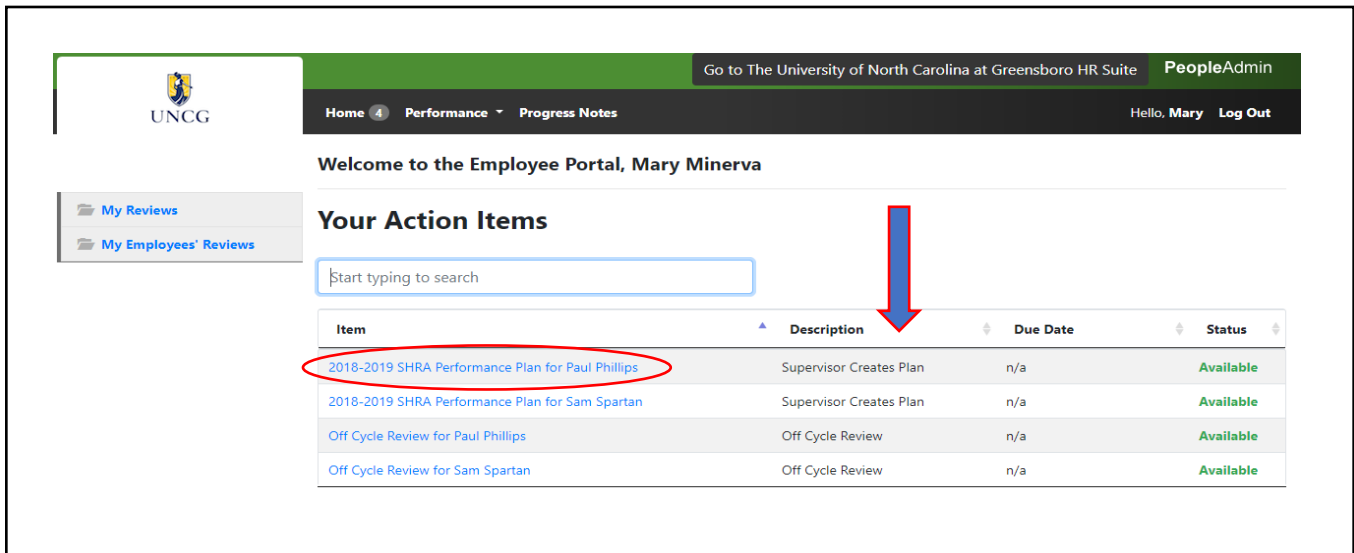
Optional Co-Reviewer

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'.**

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.

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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.

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.

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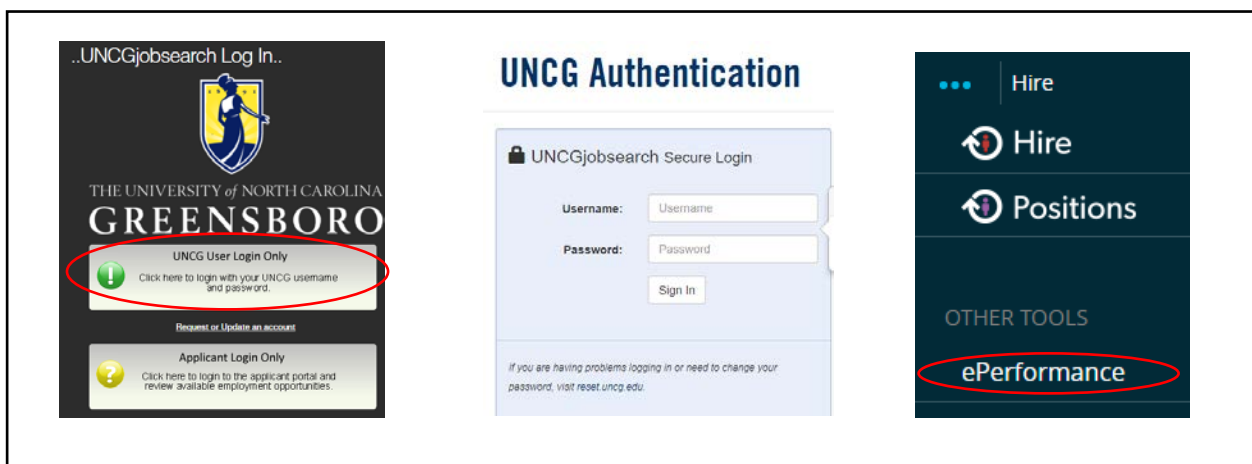
Once logged in, click the **'Go to ePerformance'** link in the upper right-hand corner of your page

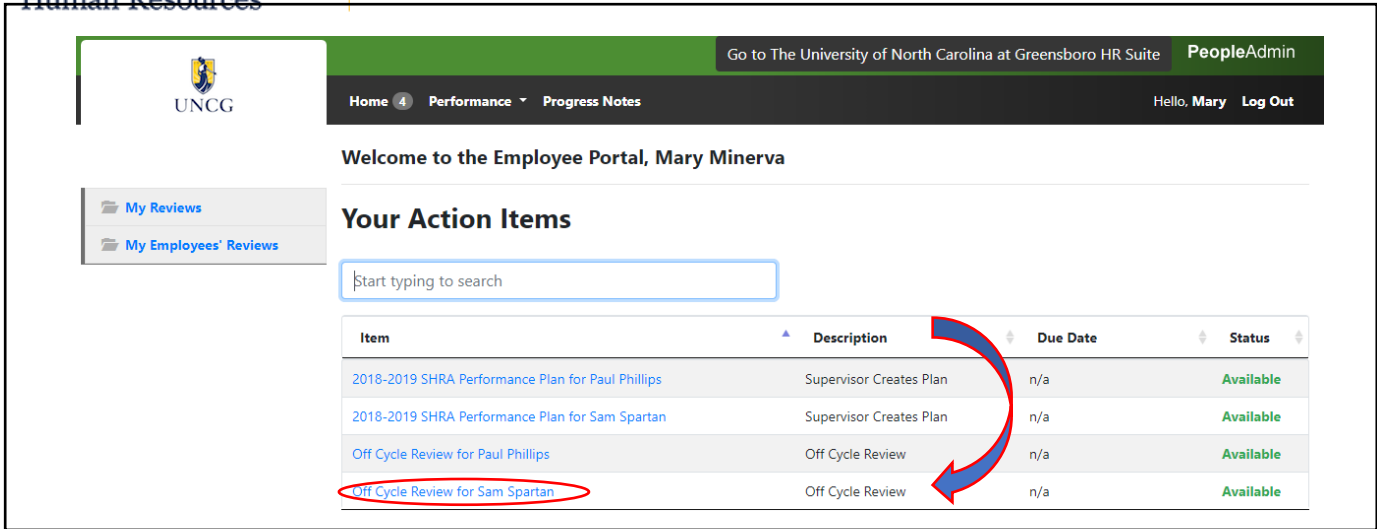**Note, you can access this link from any module and log in as any user type.**

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'.**

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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.

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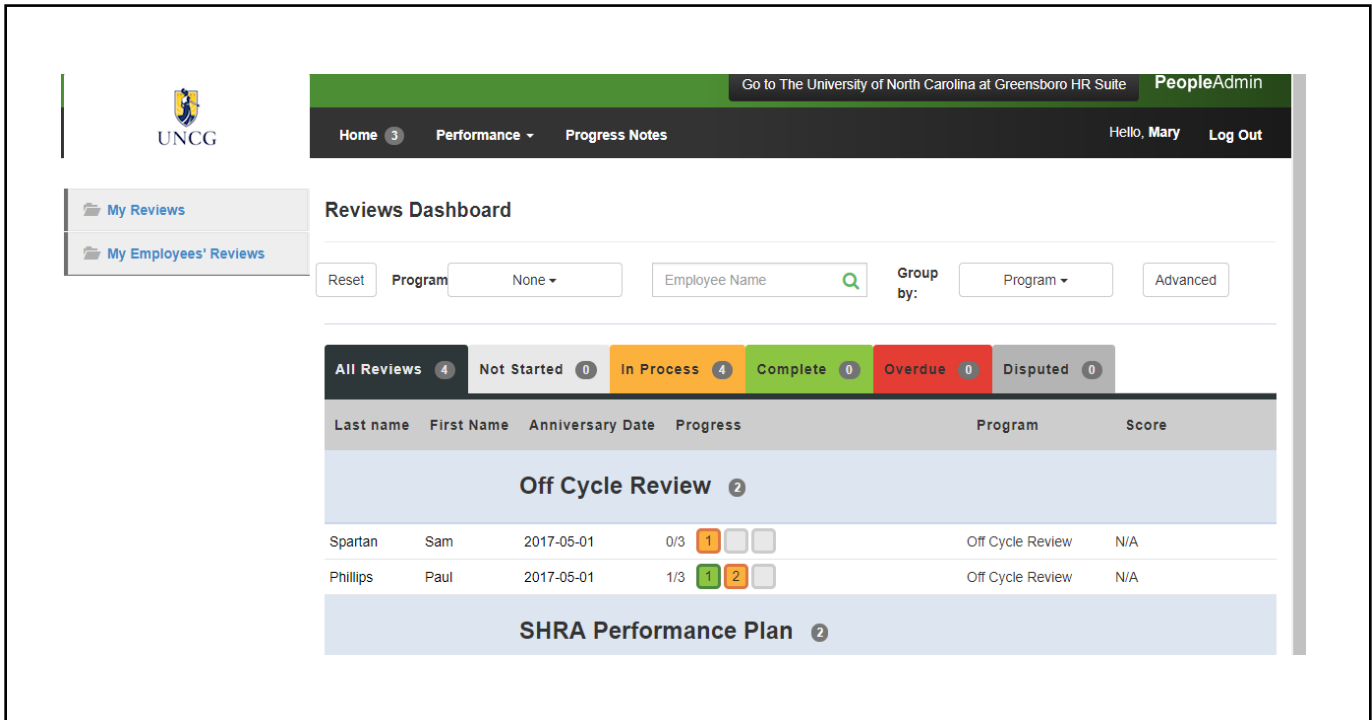
Scenario 2. Employee's Second or Subsequent Off-Cycle Review in Current Performance Cycle.

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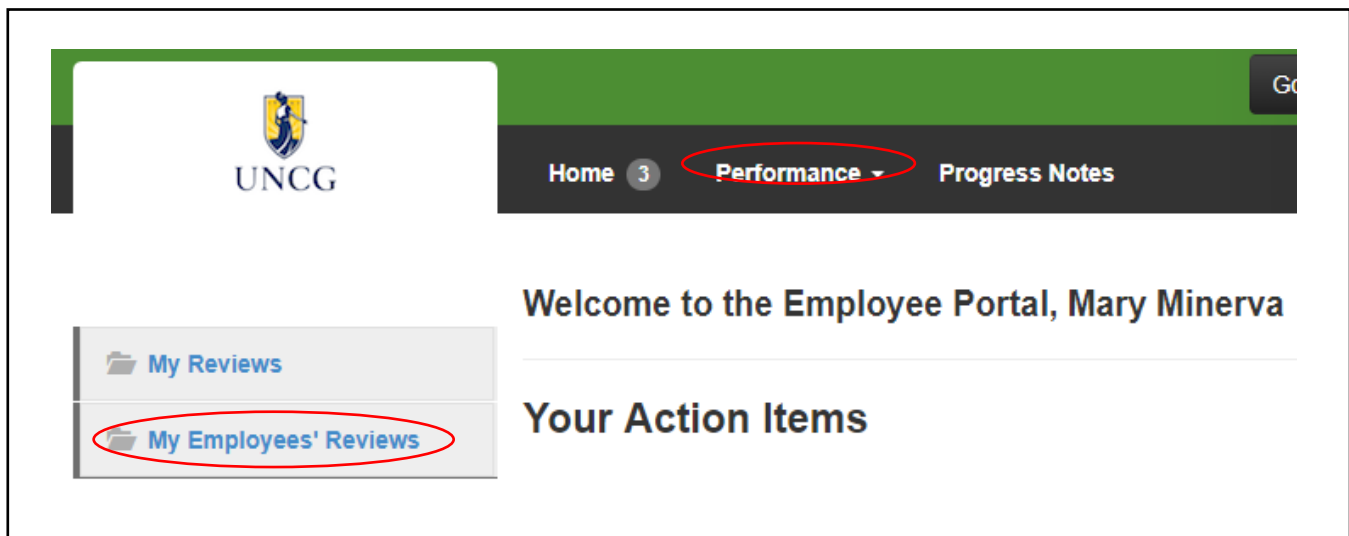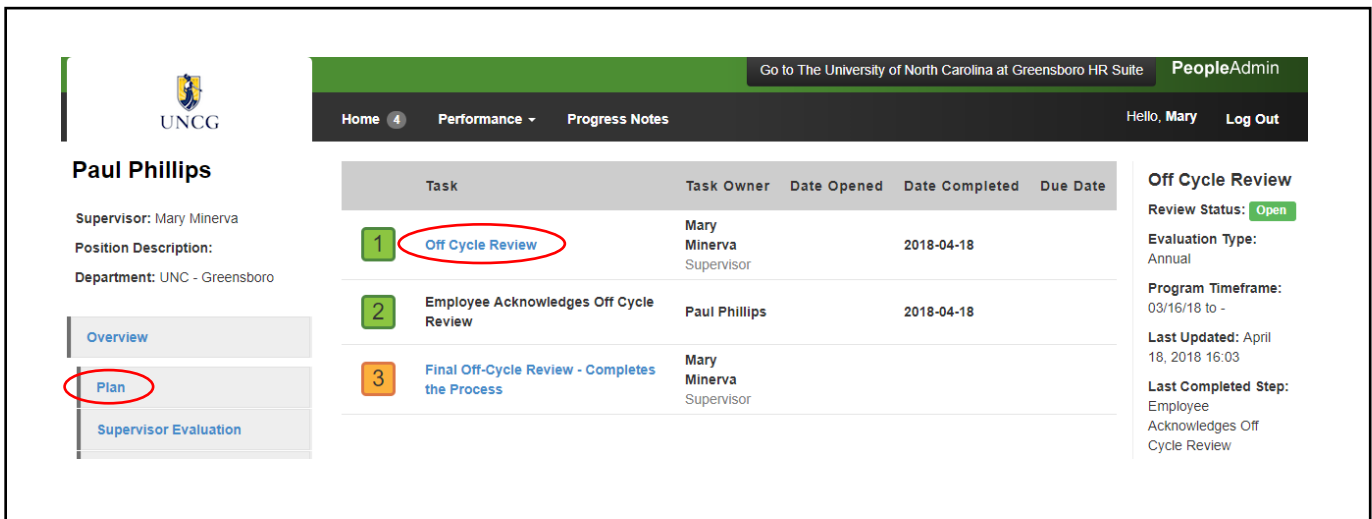
When the screen below appears, it will automatically show you the current performance cycle programs which include the SHRA Performance Review and Off-Cycle Review for each of your employees which are currently open. You can also use the search bar or the program filter to find the desired program. Select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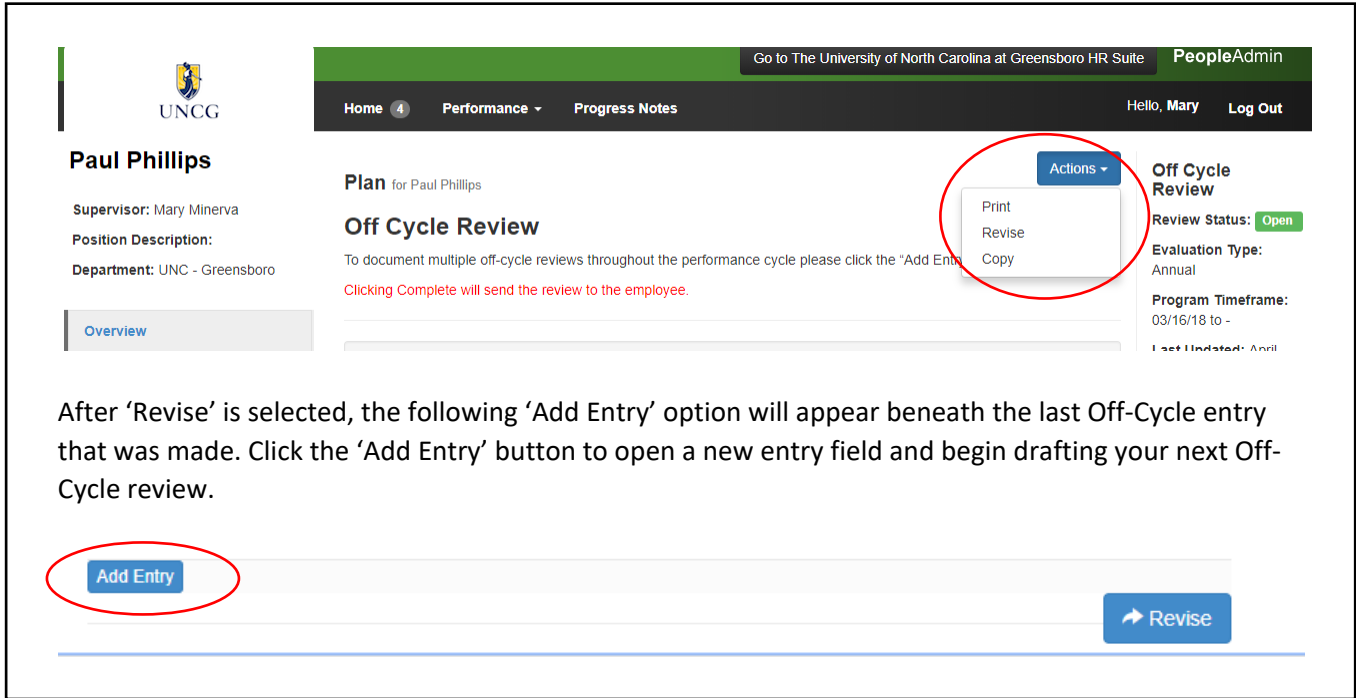

When the following screen appears choose the **'Plan'** link in the left navigation pane or click the **'Off-Cycle Review'** link to open the Off-Cycle review.
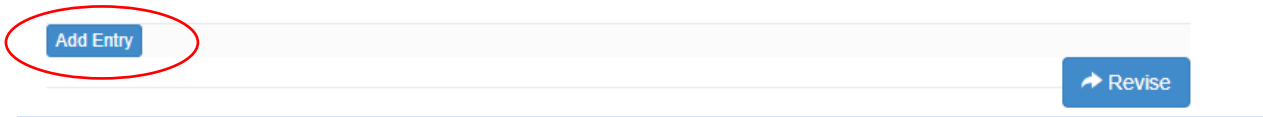
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Once the Off-Cycle Review is selected, the following screen will appear. You will see the previous Off-Cycle review(s) you entered in this cycle. To add your new or most recent Off-Cycle review you should click the blue **'Actions'** button and select **'Revise'**.
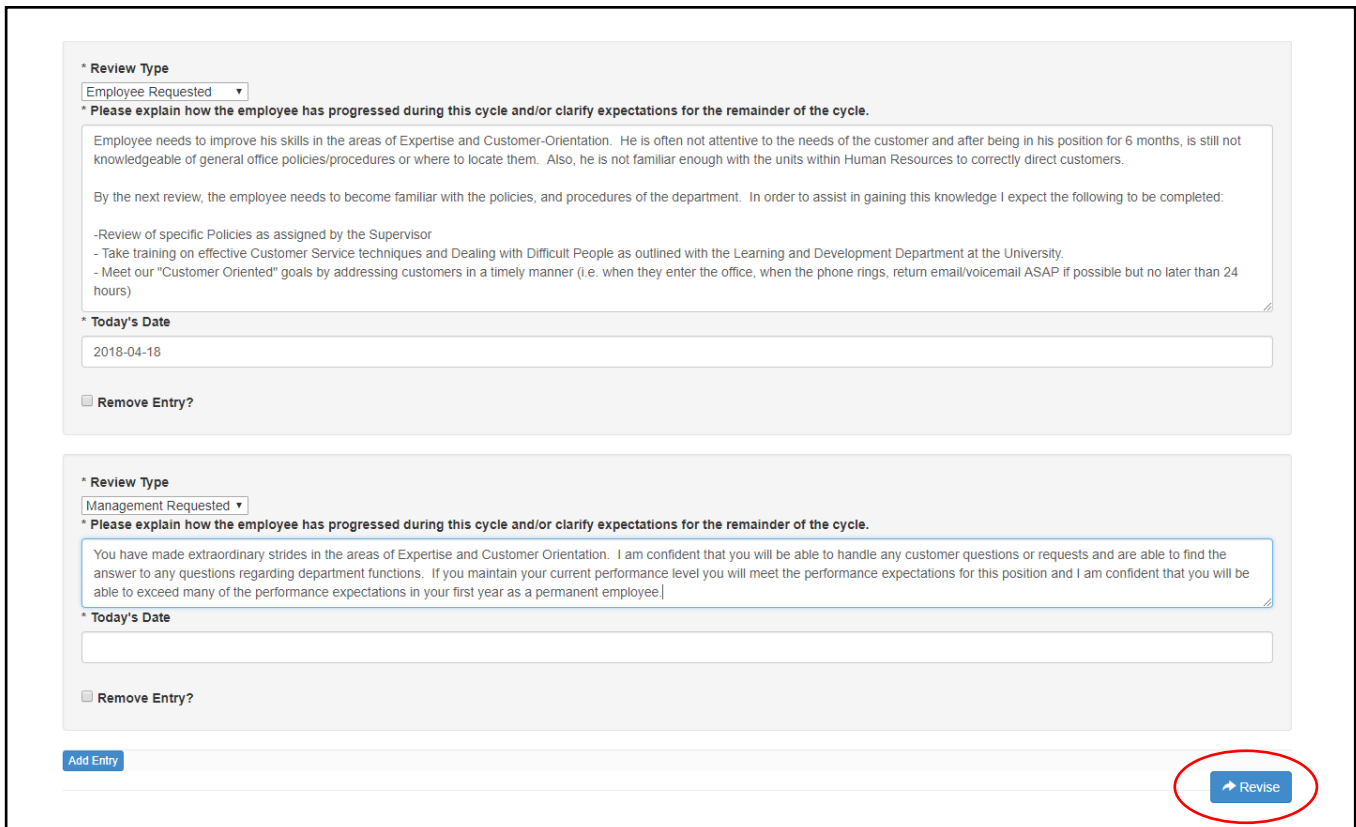
After 'Revise' is selected, the following 'Add Entry' option will appear beneath the last Off-Cycle entry that was made. Click the 'Add Entry' button to open a new entry field and begin drafting your next Off-Cycle review.

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.

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.
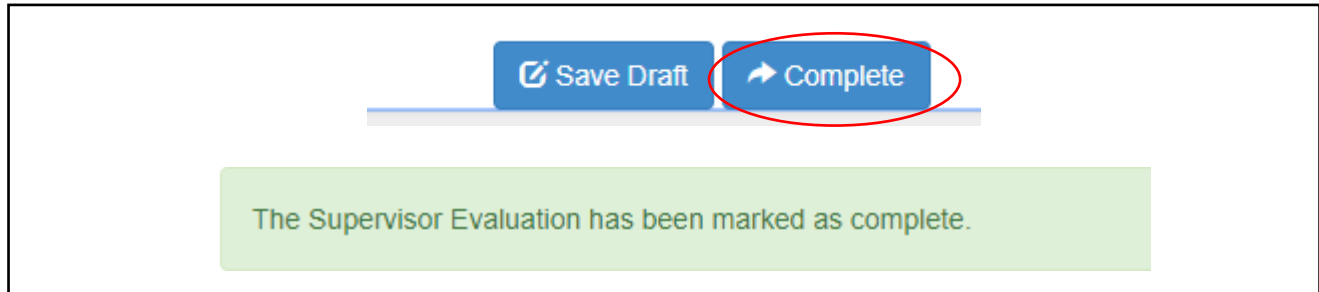
Quarterly Probationary Review

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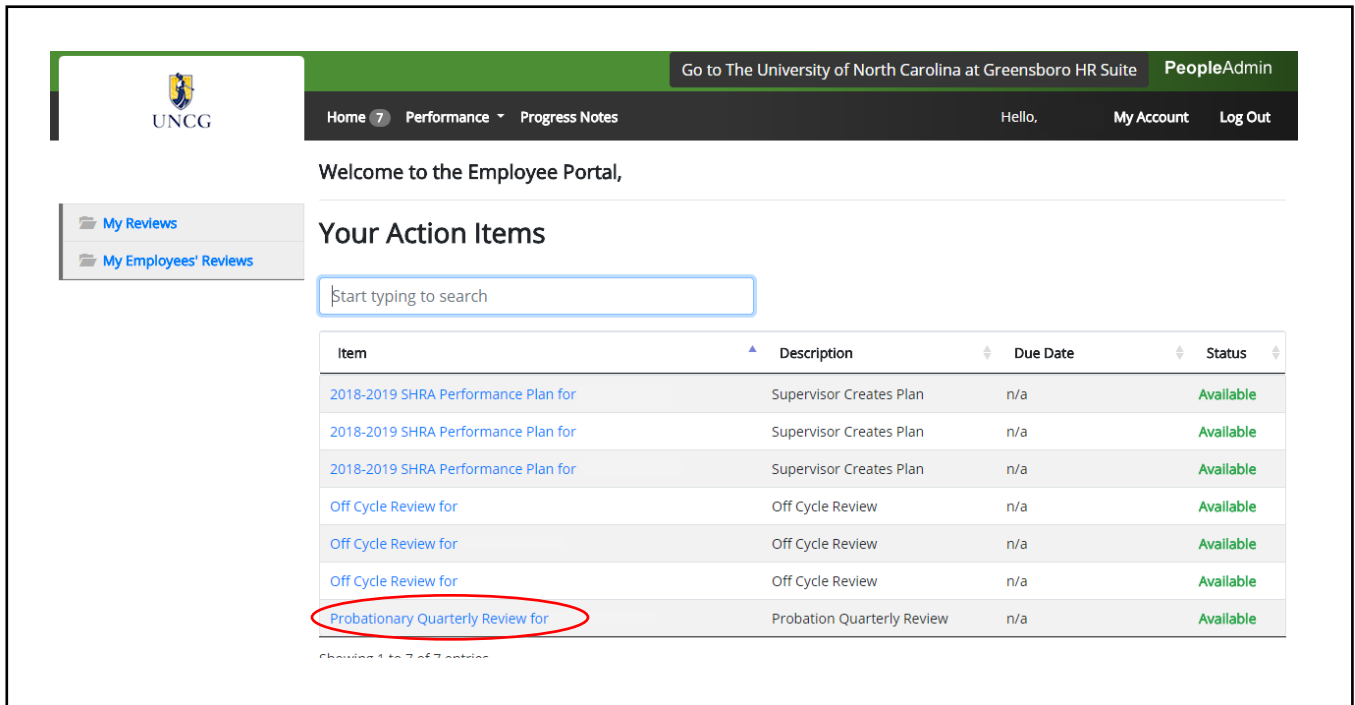
To add a Probationary Quarterly Review, log into SpartanTalent ePerformance Management (https://spartantalent.uncg.edu/hr/sessions/new) using your UNCG login credentials.

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'**.

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

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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_7WIuplFY03m69w1