



The 2<sup>nd</sup> Level Role guide covers the following Performance Management steps:

1: Supervisor Creates the Plan

4: Employee Plan Acknowledgement

7: Second-Level Review of Appraisal

2: Second-Level Review of Plan

5: Employee Self Evaluation

8: Send Appraisal to Employee

3: Supervisor/Employee Plan Meeting

6: Annual Appraisal Creation

9: Acknowledge Appraisal

*Proceed to next slide (Index) for guide navigation*

**RETURN TO INDEX**



UNIVERSITY OF NORTH CAROLINA  
**SCHOOL OF THE ARTS**

**HUMAN RESOURCES**

**PERFORMANCE MANAGEMENT LEARNING**

**2<sup>ND</sup> LEVEL ROLE**

**JOB AID RESOURCE INDEX**

**Direct Access to 2<sup>nd</sup> Level Role Steps:**

[Step 2: 2<sup>nd</sup> Level Review of Plan](#)

[Step 7: 2<sup>nd</sup> Level Review of Appraisal](#)

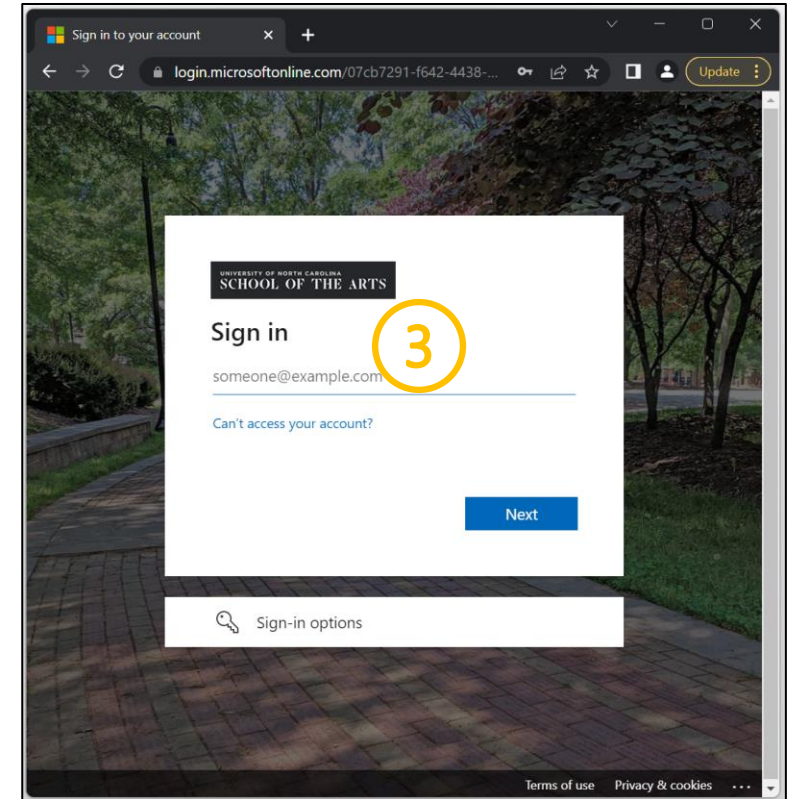
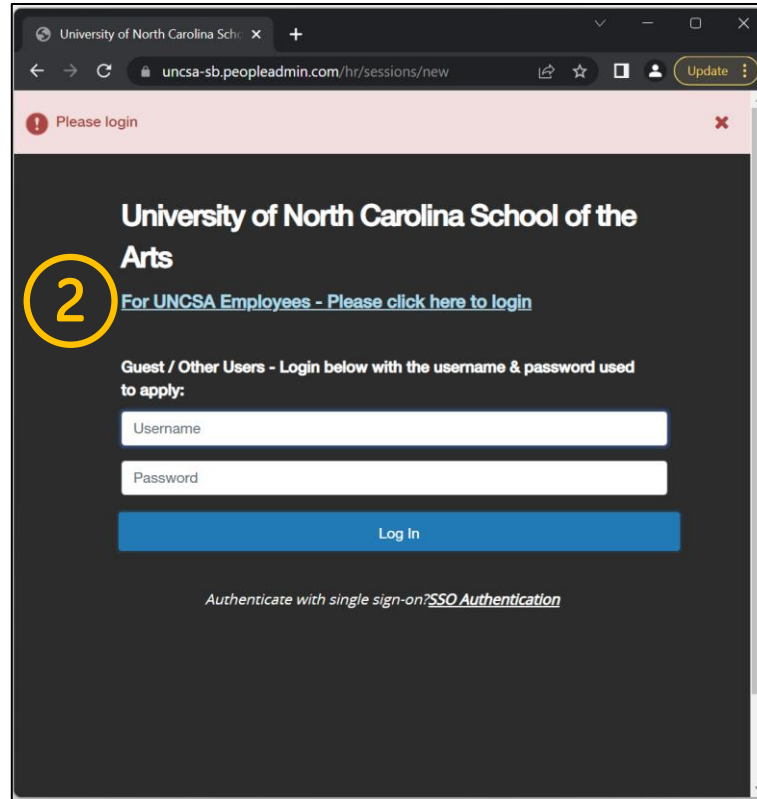
*Note: Click Link to Navigate Directly*

*Slide Navigation: Click Return to Index button at any time to return here*



### STEPS

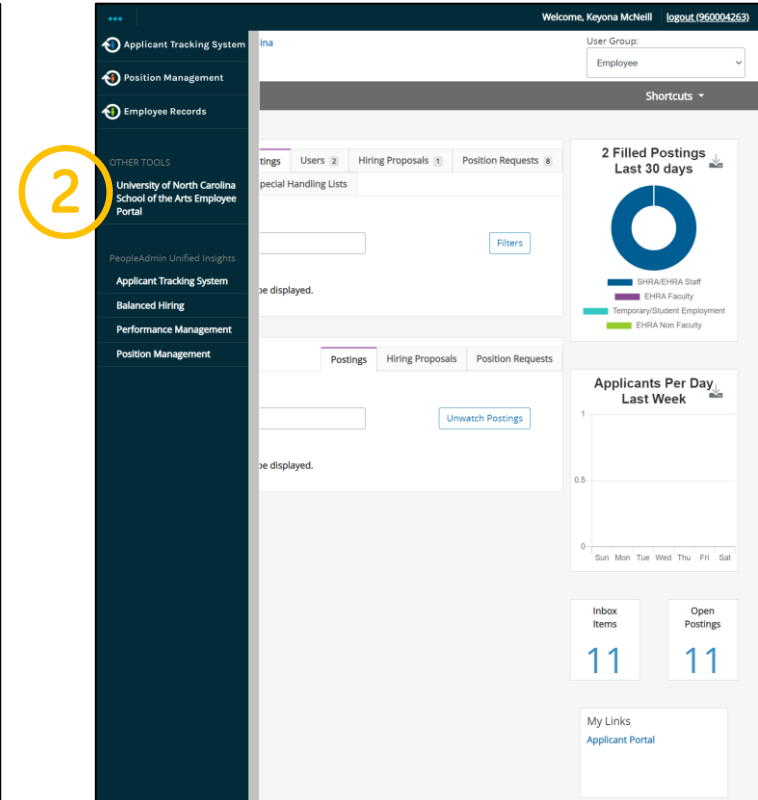
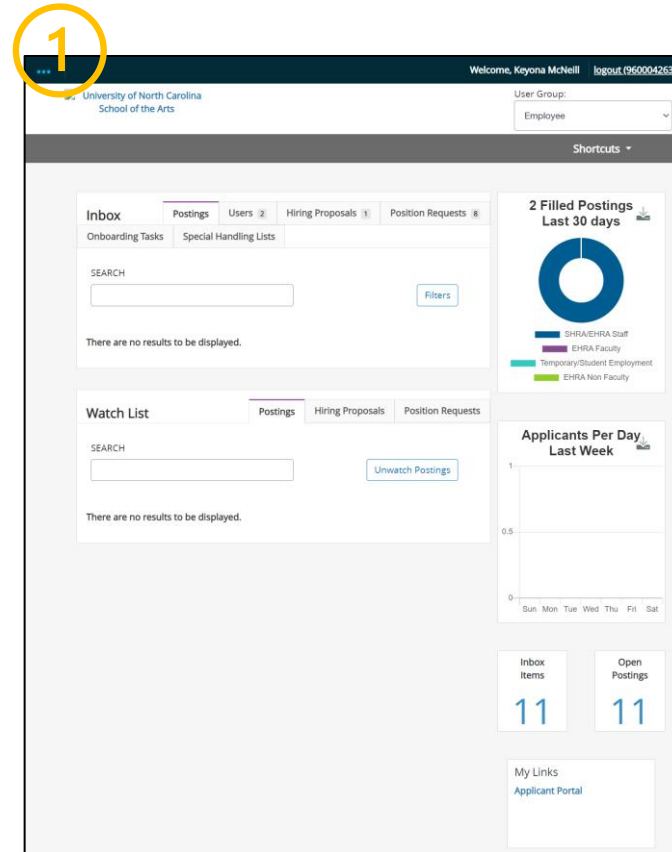
1. Access [People Admin](#)
2. Click For UNCSA Employees
3. Login with Microsoft



## 2<sup>ND</sup> LEVEL ROLE: REVIEW PLAN | Navigate to Employee Portal

### STEPS

1. Click the three-dot menu
2. Click UNCSA Employee Portal



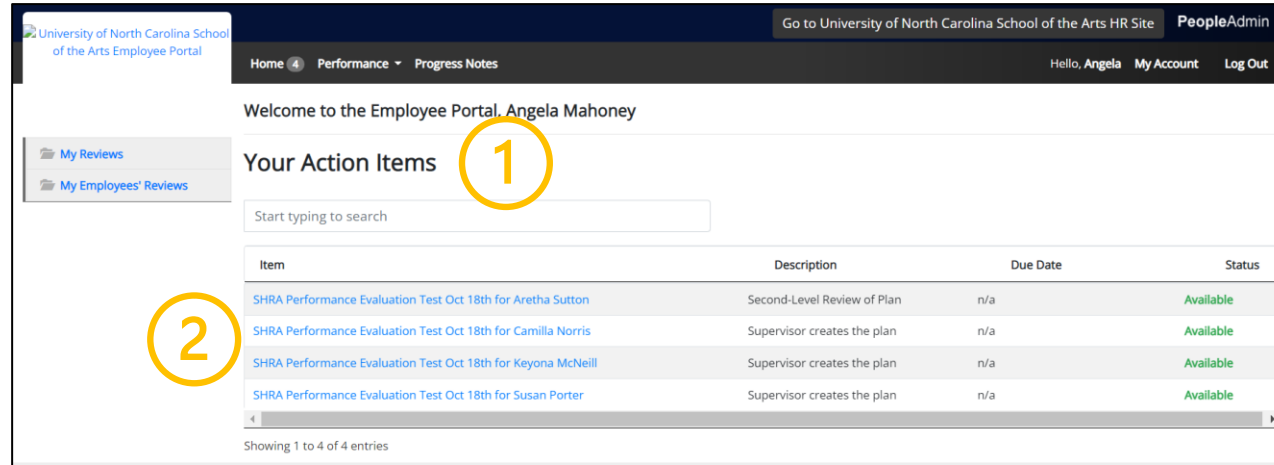
## 2<sup>ND</sup> LEVEL ROLE: REVIEW PLAN | Review Action Items & Select Employee to Review Plan

### STEPS

1. Review Action Items List

2. Click Item Link with Employee

Name to Review Plan



University of North Carolina School of the Arts Employee Portal

Go to University of North Carolina School of the Arts HR Site PeopleAdmin

Home Performance Progress Notes Hello, Angela My Account Log Out

Welcome to the Employee Portal, Angela Mahoney

**Your Action Items** 1

Start typing to search

| Item   | Description                 | Due Date | Status    |
|--|-----------------------------|----------|-----------|
| <a href="#">SHRA Performance Evaluation Test Oct 18th for Aretha Sutton</a>  | Second-Level Review of Plan | n/a      | Available |
| <a href="#">SHRA Performance Evaluation Test Oct 18th for Camilla Norris</a> | Supervisor creates the plan | n/a      | Available |
| <a href="#">SHRA Performance Evaluation Test Oct 18th for Keyona McNeill</a> | Supervisor creates the plan | n/a      | Available |
| <a href="#">SHRA Performance Evaluation Test Oct 18th for Susan Porter</a>   | Supervisor creates the plan | n/a      | Available |

Showing 1 to 4 of 4 entries

2



# 2<sup>ND</sup> LEVEL ROLE: REVIEW PLAN | Review Guidelines & Complete Review

## STEPS

1. Review Plan for Employee
2. Once Review is Complete, Select Approve or Return
3. Select OK on Pop Up if Approving

The Review Plan Step is Complete! It Will Now Route to Supervisor to Conduct Meeting with Employee

University of North Carolina School of the Arts Employee Portal

Home Performance Progress Notes Hello, Angela My Account Log Out

Go to University of North Carolina School of the Arts HR Site PeopleAdmin

Aretha Sutton

Supervisor: Keyona McNeill  
Position Description: Talent Solutions Manager  
Department: UNC School of the Arts

Plan for Aretha Sutton

Institutional Goals

OVERVIEW OF INSTITUTIONAL GOALS

- The expectations below are written at the "Meeting Expectations" level.
- The institutional goals are designed to address all aspects of an employee's work product and workplace behavior. All duties on the employee's position description are rated through these institutions goals.
- You may use the position description document to help you discuss institutional goals. To access the current position description, hover over the job title in the upper left-hand side of the screen under your name. Clicking on the job title will open the position description in a separate window.

STEPS FOR COMPLETING THIS PAGE

- Weight:** The supervisor must assign a weight to each institutional goal. Institutional goals are 50% of the final overall rating on the employee's annual appraisal. The total for the items below must equal 50%. Each goal must be at least 5%.
- Goal Description:** Additional comments are optional. Supervisors may choose to include specific expectations related to a goal as needed.
- If the employee has an active disciplinary action, then expectations must be included below for the specific institutional goals indicated in the active disciplinary action.
- If the employee received a rating of "Not Meeting Expectations" in any goal on the last annual appraisal, then expectations must be included below for that goal.

NEXT

- Click "Next" to save this information and move on to individual goals.
- You can also select "Save Draft" if you wish to complete the plan some other time.

Goal Name

EXPERTISE

Description

- 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.
- Resourcing:** Makes efficient and appropriate use of materials and documents work appropriately.
- Innovation:** Looks for ways to improve efficiency or quality.
- Development:** Maintains technical skills and relevant professional credentials.

Weight

13%

Comments

NEXT

- CAUTION:** If you click "Complete," the performance plan will be saved, closed, and moved on to the next step in the process: "Second-level Review of Plan." If you do not want to send the performance plan to the second-level reviewer yet, select "Save Draft" to complete the plan some other time.

Talent Development Goals

Develop and strengthen skillsets in the area of application and tools which will improve efficiencies and reduce manual efforts.

Comment

Check Spelling

Return Approve

uncsa-training.peopleadmin.com say...  
Are you sure you want to approve this task? Once a task has been approved, it may not be available for further revision.

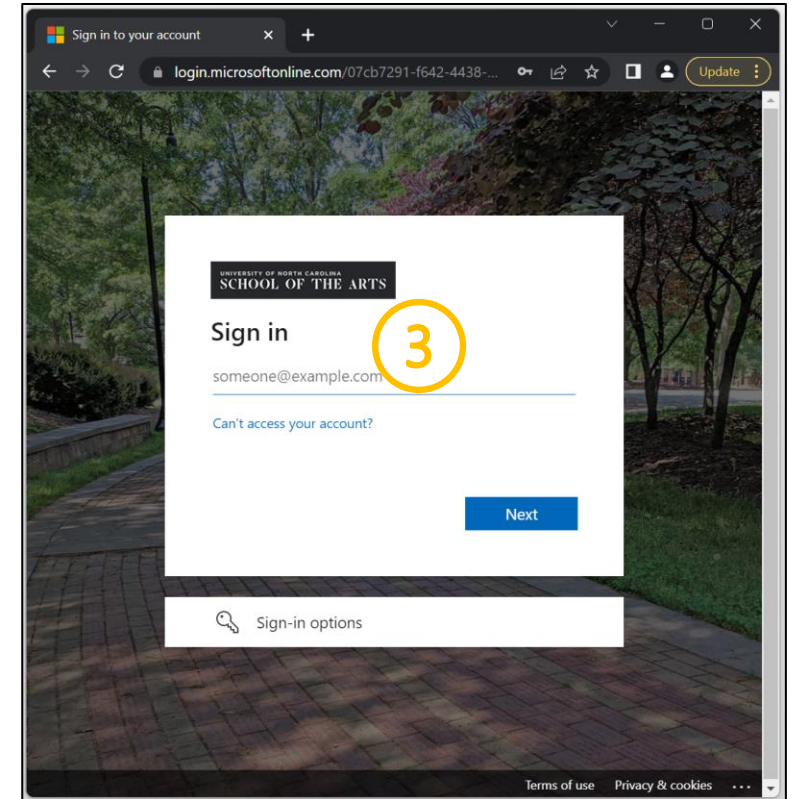
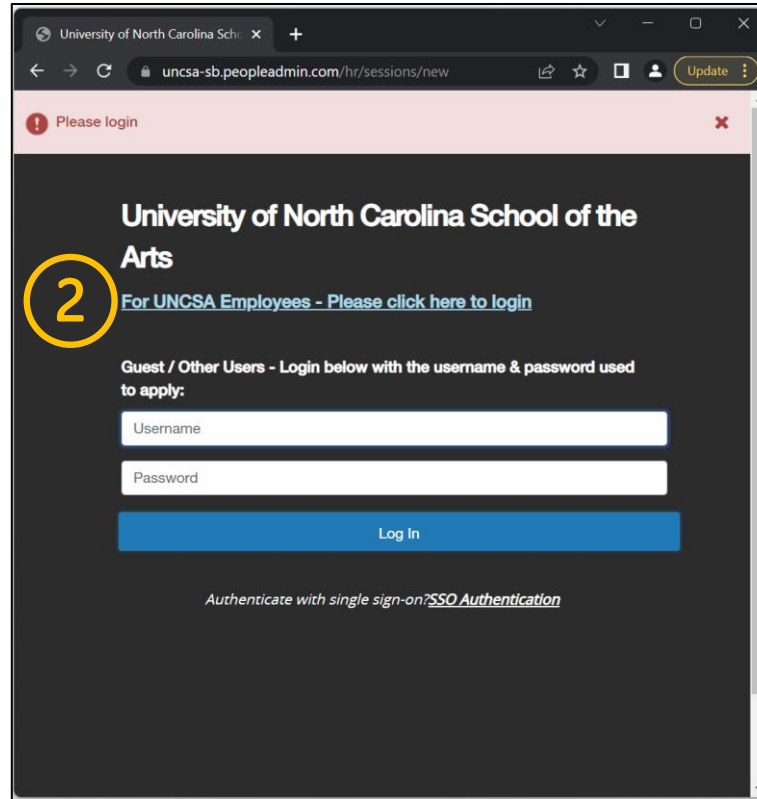
OK Cancel





### STEPS

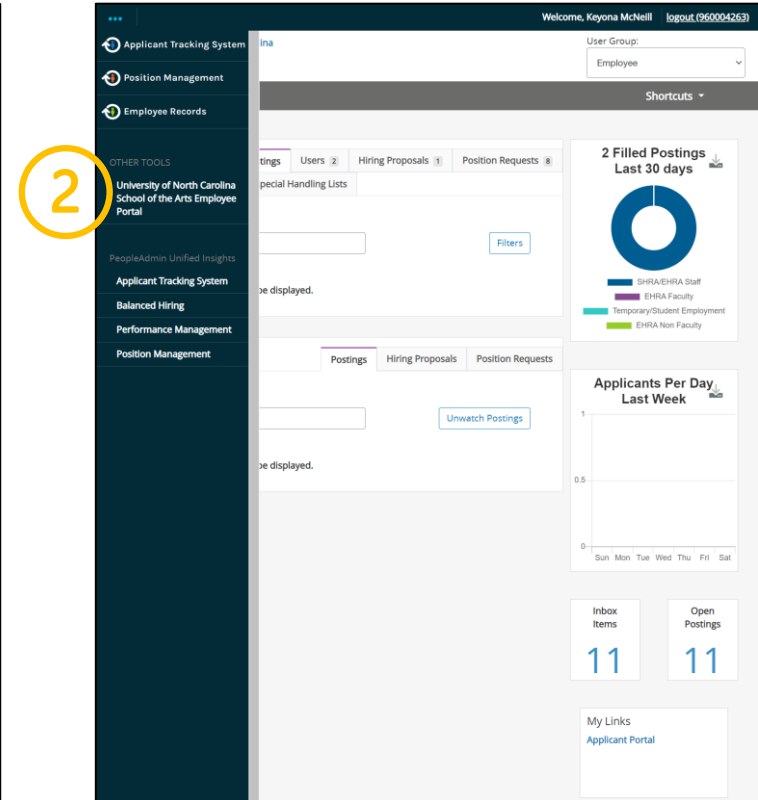
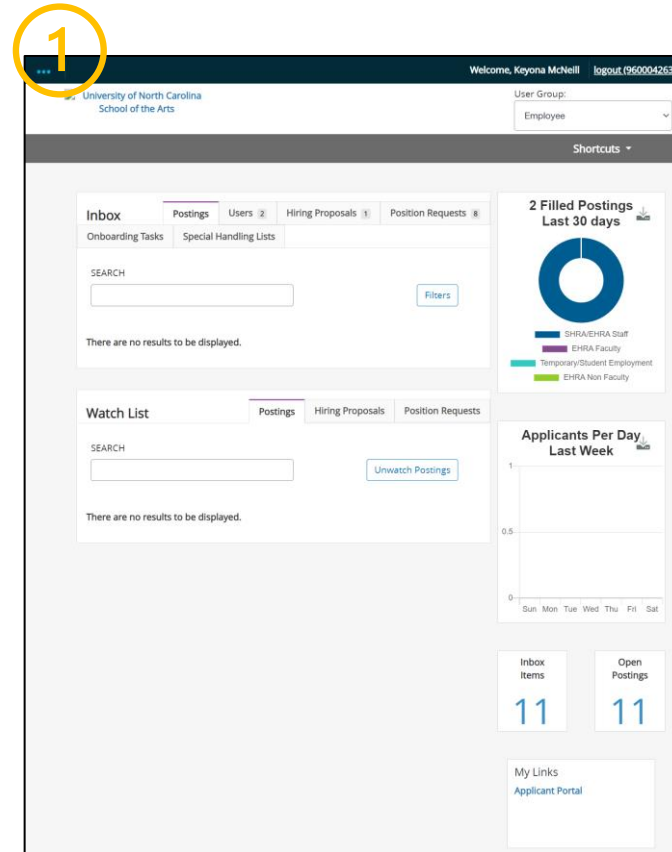
1. Access [People Admin](#)
2. Click For UNCSA Employees
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## 2<sup>ND</sup> LEVEL ROLE: REVIEW PLAN | Navigate to Employee Portal

### STEPS

1. Click the three-dot menu
2. Click UNCSA Employee Portal





## 2<sup>ND</sup> LEVEL ROLE: REVIEW APPRAISAL | Review Action Items & Select Employee to Review Appraisal

### STEPS

1. Review Action Items List
2. Click Item Link with Employee Name to Review Appraisal

University of North Carolina School of the Arts Employee Portal

Go to University of North Carolina School of the Arts HR Site PeopleAdmin

Home Performance Progress Notes Hello, Angela My Account Log Out

Welcome to the Employee Portal, Angela Mahoney

Your Action Items

Start typing to search

| Item   | Description                      | Due Date | Status    |
|--|----------------------------------|----------|-----------|
| <a href="#">SHRA Performance Evaluation Test Oct 18th for Aretha Sutton</a>  | Second-Level Review of Appraisal | n/a      | Available |
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Showing 1 to 4 of 4 entries



## 2<sup>ND</sup> LEVEL ROLE: REVIEW APPRAISAL | Review Guidelines & Complete Review

### STEPS

1. Review Appraisal for Employee
2. Once Review is Complete, Select Approve or Return
3. Select OK on Pop Up if Approving

The Review Appraisal Step is Complete!

It Will Now Route to Supervisor to

Conduct Meeting with Employee

University of North Carolina School of the Arts Employee Portal

Go to University of North Carolina School of the Arts HR Site PeopleAdmin

Home Performance Progress Notes Hello, Angela My Account Log Out

Aretha Sutton

Supervisor: Keyona McNeill  
Position Description: Talent Solutions Manager  
Department: UNC School of the Arts

SHRA Performance Evaluation Test Oct 18th

Review Status: **Open**

Overall Rating: Meeting Expectations

Evaluation Type: Annual  
Program Timeframe: 03/01/23 to -  
Last Updated: November 07, 2022 00:49  
Last Completed Step: Annual Appraisal Creation

INSTRUCTIONS: Review the information below. You may add comments for the supervisor at the bottom of the page (employees will not see these comments). To complete the process, please click on the blue "Action" button to the right and then click on "Approve" OR click on the blue "Approve" button at the bottom of the page to send back to the supervisor. If you wish to return the appraisal to the supervisor for further edits, contact the supervisor and/or provide comments at the bottom of the page, and then select "Return" to send the appraisal back to the supervisor.

**1**

Institutional Goals

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: 13%

Plan Comments:

Rating: Meeting Expectations

Comments

Overall Performance Comments

Employee Met Expectations

Was there an active disciplinary action from this performance cycle?

No

Comment

check spelling

**2**

Return Approve

uncsa-training.peopleadmin.com say

Are you sure you want to approve this task? Once this task has been approved, it may not be available for further revision.

**3**

OK Cancel



