The Supervisor Role guide covers the following Performance Management steps:

1: Supervisor Creates the Plan  
2: Second-Level Review of Plan  
3: Supervisor/Employee Plan Meeting  
4: Employee Plan Acknowledgement  
5: Employee Self Evaluation  
6: Annual Appraisal Creation  
7: Second-Level Review of Appraisal  
8: Send Appraisal to Employee  
9: Acknowledge Appraisal

Proceed to next slide (Index) for guide navigation
Direct Access to Supervisor Role Steps:

**Step 1: Create Plan**

**Step 3: Supervisor/Employee Plan Meeting**

**Step 6: Annual Appraisal Creation**

**Step 8: Send Appraisal to Employee**

*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
SUPERVISOR ROLE: CREATE PLAN | Navigate to Employee Portal

**STEPS**

1. Click the three-dot menu
2. Click UNCSA Employee Portal
SUPERVISOR ROLE: CREATE PLAN | Review Action Items & Select Employee to Start Plan

STEPS

1. Review Action Items List
2. Click Item Link with Employee Name to Start Plan
STEPS

1. Review Guidelines

Visit Resource for More Info

2. Begin Institutional Goals by

Clicking Save & Continue
STEPS

1. Review Outline of Institutional Goals
2. Apply Percentage Weights to Each Goal. Ensure Weights Add to 50%
3. When Complete, Click Save & Continue

INSTITUTIONAL GOALS: These are University system-wide performance standards for all SHRA positions that provide the supervisor and employee a way to discuss performance expectations. Each job duty has performance expectations that are described in the institutional goals (for example, level of accuracy, quality of analysis, efficiency of process management, the impact of absenteeism, how interactions with others affect the work produced, adherence to policy and procedure, etc.). Each institutional goal is weighted no less than 5% of the final overall rating. The total for the institutional goals must equal 50% of the final overall rating.
SUPERVISOR ROLE: CREATE PLAN | Individual Goals

**STEPS**

1. **Review Outline of Individual Goals**

2. **Enter 3-5 Goals and Weights. Ensure Weights Add to 50%**

3. **When Complete, Click Save & Continue**

**INDIVIDUAL GOALS:** The supervisor defines 3-5 individual goals for each employee each cycle. These are not intended to cover all aspects of employee work product (institutional goals do that). The focus is on key results/outcomes/deliverables, not steps in the process. Types of individual goals include Division-Wide Goals that are often tied to University strategic goals or initiatives; Work-Unit / Job-Class Goals that improve/sustain work product or related team dynamics; and Employee-Specific Goals that may emphasize key aspects of employee essential job duties or provide “stretch goals” that broaden or deepen an employee’s skillset or work product. Each institutional goal is weighted no less than 5% of the final overall rating. The total for the individual goals must equal 50% of the final overall rating.
SUPervisor role: Create plan | Talent Development Goals

Steps

1. Review Outline of Development Goals

2. Enter At Least 1 Goal.

3. When Complete, Click Complete!

Talent Development Plan: The University recommends that each employee have at least one talent development goal each performance cycle. The supervisor determines with the employee the appropriate development goal(s) for the cycle. The supervisor is expected to set development goals to address performance deficiencies for employees who received any rating of Not Meeting Expectations on their last appraisal.

The Create Plan Step is Complete! It Will Now Route to 2nd Level Approval
STEPS

1. Access People Admin
2. Click For UNCSA Employees
3. Login with Microsoft
STEPS

1. Click the three-dot menu
2. Click UNCSA Employee Portal
SUPERVISOR ROLE: SUPERVISOR/EMPLOYEE PLAN MEETING | Review Action Items & Plan Meeting

**STEPS**

1. Review Action Items List

2. Click Item Link with Employee Name to Plan Meeting

3. Schedule a Face-to-Face Meeting with Employee
**STEPS**

1. **Review Plan with Employee**

2. **Once Review is Complete, Select**
   - Acknowledge or Return
   - Add Comment as Needed

3. **Select OK on Pop Up if Acknowledging**

The Plan Meeting Step is Complete! It Will Now Route to Employee to Acknowledge

[RETURN TO INDEX]
STEPS

1. Access People Admin

2. Click For UNCSA Employees

3. Login with Microsoft
STEPS

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

1. Review Action Items List
2. Click Item Link with Employee Name to Begin Appraisal
SUPervisor Role: Annual Appraisal Creation | Create Annual Appraisal

Steps:

1. Review Instructions
2. Click Save & Continue
STEPS

1. Complete Ratings for ALL Goals
2. Click Save & Continue
**STEPS**

1. **Complete Ratings for ALL Goals**
2. **Click Save & Continue**
STEPS

1. Add Comments for Development Goal
2. Click Save & Continue
STEPS

1. Complete Overall Performance Comments and Answers

2. Click Complete

3. Click OK

The Appraisal Will Now Route to for 2\textsuperscript{nd} Level Review
STEPS

1. Access People Admin
2. Click For UNCSA Employees
3. Login with Microsoft

RETURN TO INDEX
STEPS

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

RETURN TO INDEX
**STEPS**

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

1. **Review Appraisal and Schedule**
   - Meeting with Employee
   - Send Appraisal to Employee Prior to Performance Review Meeting

2. **Acknowledge or Return**

3. **Select OK on Pop Up if Acknowledging**

4. **Hold Performance Review Meeting with Employee**