#### UNIVERSITY OF NORTH CAROLINA SCHOOL OF THE ARTS

### **HUMAN RESOURCES**

PERFORMANCE MANAGEMENT LEARNING SUPERVISOR ROLE JOB AID RESOURCE



# The Supervisor 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



UNIVERSITY OF NORTH CAROLINA SCHOOL OF THE ARTS

### **HUMAN RESOURCES**

PERFORMANCE MANAGEMENT LEARNING SUPERVISOR ROLE JOB AID RESOURCE INDEX

# **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* 





### SUPERVISOR ROLE: CREATE PLAN | Login

# **STEPS**

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







### SUPERVISOR ROLE: CREATE PLAN | Navigate to Employee Portal



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

Welco	ome, Keyona McNeill logout (960004263)		
niversity of North Carolina School of the Arts	User Group:	Applicant Tracking System	ina
	Employee	Position Management	
	Shortcuts +	Employee Records	
Postings Users 2 Hiring Proposals 1 Position Requests a	2 Filled Postings	OTHER TOOLS	tings Users 2 Hiring Proposals 1 Position Reques
s Special Handling Lists	Last 30 days	University of North Carolina	pecial Handling Lists
4		Portal	
Filters		PeopleAdmin Unified Insights	Filters
e are no results to be displayed	SHRA/EHRA Staff	Applicant Tracking System	he displayed.
	Temporary/Student Employment	Balanced Hiring	
	EHRA Non Faculty	Performance Management	
ch List Postings Hiring Proposals Position Requests	Applicants Bas Day	Position Management	Postings Hiring Proposals Position Requ
ARCH	Last Week		
Unwatch Postings	. 62		Unwatch Postings
ere are no results to be displayed.			be displayed.
	0.5		
	0 Sun Mon Tue Wed Thu Fri Sat		
	Inbox Open Items Postings		
	11 11		
	My Links		
	Applicant Portal		



, Keyona McNeill logout (960004263)

Shortcuts 👻

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2 Filled Postings

Last 30 days

EHRA Faculty Temporary/Student Employ EHRA Non Faculty

Applicants Per Day Last Week

Sun Mon Tue Wed Thu Fri Sat

Open Postings

11

Inbox Items

11

My Links Applicant Portal

Jser Group: Employee

### SUPERVISOR ROLE: CREATE PLAN | Review Action Items & Select Employee to Start Plan

# <u>STEPS</u>

- 1. Review Action Items List
- 2. Click Item Link with

**Employee Name to Start Plan** 

University of North Carolina School	Go to Ur	niversity of North C	arolina School of the	Arts HR Site	PeopleAdmin
of the Arts Employee Portal	Home 3 Performance -	Progress Notes	Hello,	Keyona My Acco	ount Log Out
	Welcome to the Empl	oyee Portal, Ke	yona McNeill		
<ul> <li>My Reviews</li> <li>My Employees' Reviews</li> </ul>	Your Action Iter	ms 1			
	Start typing to search				
	ltem		Description	Due Date	Status
(2	SHRA Performance Evaluatio Aretha Sutton	n Test Oct 18th for	Supervisor creates the plan	n/a	Available
e	SHRA Performance Evaluatio Cappi Shelton	n Test Oct 18th for	Supervisor creates the plan	n/a	Available
	SHRA Performance Evaluatio Kemora Brownlee	n Test Oct 18th for	Supervisor creates the plan	n/a	Available
	Showing 1 to 3 of 3 entries				1



#### SUPERVISOR ROLE: CREATE PLAN | Review Guidelines & Begin

## **STEPS**

1. Review Guidelines

#### **Visit Resource for More Info**

2. Begin Institutional Goals by

#### **Clicking Save & Continue**

RETURN TO INDEX



#### SUPERVISOR ROLE: CREATE PLAN | Institutional Goals

# **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

# <u>STEPS</u>

- 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 2<sup>nd</sup> Level Approval





### SUPERVISOR ROLE: SUPERVISOR/EMPLOYEE PLAN MEETING | Login

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







#### SUPERVISOR ROLE: SUPERVISOR/EMPLOYEE PLAN MEETING | Navigate to Employee Portal

**STEPS** 

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





### SUPERVISOR ROLE: SUPERVISOR/EMPLOYEE PLAN MEETING | Review Action Items & Plan Meeting

## <u>STEPS</u>

- 1. Review Action Items List
- 2. Click Item Link with Employee

Name to Plan Meeting

3. Schedule a Face-to-Face Meeting

RETURN TO INDEX

with Employee

Cuniversity of North Carolina School		Go to University of North	Carolina School of the Arts H	R Site <b>People</b> Admin
of the Arts Employee Portal	Home 3 Performance - Progress Notes		Hello, <b>Keyona</b>	My Account Log Out
	Welcome to the Employee Portal, Keyona McNeill			
🖆 My Reviews	Your Action Items			
🖀 My Employees' Reviews				
	Start typing to search			
$\sim$	Item	Description	Due Date	Status
()	SHRA Performance Evaluation Test Oct 18th for Aretha Sutton	Supervisor/Employee Plan Meeting	n/a	Available
	SHRA Performance Evaluation Test Oct 18th for Cappi Shelton	Supervisor creates the plan	n/a	Available
	SHRA Performance Evaluation Test Oct 18th for Kemora Brownlee	Supervisor creates the plan	n/a	Available
	4			•

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#### SUPERVISOR ROLE: SUPERVISOR/EMPLOYEE PLAN MEETING | Conduct Face-to-Face Meeting & Complete

# <u>STEPS</u>

- 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







#### SUPERVISOR ROLE: ANNUAL APPRAISAL CREATION | Login

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







#### SUPERVISOR ROLE: ANNUAL APPRAISAL CREATION | Navigate to Employee Portal



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

	Velcome, Keyona McNeill logout (960004263)		weicome, keyona McNelli logout (9600
University of North Carolina     School of the Arts	User Group: Employee	Applicant Tracking System	User Group: Employee
	Shortcuts *	Employee Records	Shortcuts *
Inbox         Postings         Users         Iting Proposals         Position Requests           Onboarding Tasks         Special Handling Lists             Filters           Filters	2 Filled Postings Last 30 days	OTHER TOOLS     University of North Carolina School of the Arts Employee Portal       PeopleAdmin Unified Insights       Applicant Tacking System       Balanced Hiring	ring Proposals 1 Position Requests 8  Filters  Filters  Characterized and the second s
Watch List         Postings         Hiring Proposals         Position Request           SEARCH         Unwatch Postings         Unwatch Postings	Applicants Per Day Last Week	Position Management Postings	Hiring Proposals Position Requests Applicants Per Day Last Week
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	My Links Applicant Portal		My Links Applicant Portal



# <u>STEPS</u>

- **1.** Review Action Items List
- 2. Click Item Link with Employee

Name to Begin Appraisal

	Go to University of North	Carolina School of the Arts HF	Site PeopleAdmi
Home 🚯 Performance - Progress Notes		Hello, <b>Keyona</b>	My Account Log Ou
Welcome to the Employee Portal, Keyona McNeill			
Your Action Items			
Start typing to search			
Item	Description	Due Date	Status
SHRA Performance Evaluation Test Oct 18th for Aretha Sutton	Annual Appraisal Creation	n/a	Available
SHRA Performance Evaluation Test Oct 18th for Cappi Shelton	Supervisor creates the plan	n/a	Available
SHRA Performance Evaluation Test Oct 18th for Kemora Brownlee	Supervisor creates the plan	n/a	Available
	Home I Performance <ul> <li>Progress Notes</li> </ul> Welcome to the Employee Portal, Keyona McNeill             Your Action Items         1           Start typing to search           Item           SHRA Performance Evaluation Test Oct 18th for Aretha Sutton           SHRA Performance Evaluation Test Oct 18th for Cappi Shelton           SHRA Performance Evaluation Test Oct 18th for Cappi Shelton	Go to University of North         Home ③ Performance ~ Progress Notes         Welcome to the Employee Portal, Keyona McNeill         Your Action Items         1         Start typing to search         Item       Description         SHRA Performance Evaluation Test Oct 18th for Aretha Sutton       Annual Appraisal Creation         SHRA Performance Evaluation Test Oct 18th for Cappi Shelton       Supervisor creates the plan	Bits       Performance + Progress Notes       Hello, Keyona         Welcome to the Employee Portal, Keyona McNeill       Image: Comparison of the Arts Hello, Keyona         Your Action Items       1         Start typing to search       Image: Comparison of the Arts Hello, Keyona         Item       Description       Due Date         SHRA Performance Evaluation Test Oct 18th for Aretha Sutton       Annual Appraisal Creation       n/a         SHRA Performance Evaluation Test Oct 18th for Cappi Shelton       Supervisor creates the plan       n/a



## **STEPS**

- 1. Review Instructions
- 2. Click Save & Continue





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

University of North Carolina School	Go to University of North Carolina	School of the Arts HR	Site Peop	<b>le</b> Admin
of the Arts Employee Portal	Home 3 Performance - Progress Notes	Hello, <b>Keyona</b>	My Account	Log Out
Aretha Sutton	The Supervisor Evaluation has been saved!			×
Supervisor: Keyona McNeill Position Description: Talent	Supervisor Evaluation for Aretha Sutton (Score in progress: Unrated)	Actions *	SHRA Perfor Evaluation 1	rmance Test Oct
Department: UNC School of the Arts	Once you have completed the annual appraisal the second level will be notified to approve it. You will meet with your employee after has approved the performance review.	the reviewer	18th Review Status:	Open
Overview	Before You Get Started Institutional Goals Individual Goals Talent Development Goals Overall Performance	Attachments 0	Program Timef	rame:
Plan	Required fields are indicated with an asterisk (*).	Scheck spelling	Last Updated: 1	November
Supervisor Evaluation	Institutional Goals		Last Completed	d Step:
Self Evaluation	$\frown$		Employee Self I	Evaluation
Multi-rater Feedback +	Goal Name:		reviewer	10 00-
Approvals & Acknowledgements	expertise			
History	Description:			
🗁 My Reviews	a. Precision: Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the require employee's position and profession.	ments of the		
Se My Employees' Reviews	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 Please select  Comments		(	
		4	C	
	Goal Name:		_ \ 4	
	ACCOUNTABILITY			



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

University of North Carolina School	Go to University of North Carolina School of the Arts HR				
of the Arts Employee Portal	Home 3 Performance - Progress Notes Hello, Keyona	My Account Log Out			
Aretha Sutton	The Supervisor Evaluation has been saved!	×			
Supervisor: Keyona McNeill Position Description: Talent	Supervisor Evaluation for Aretha Sutton (Score in progress: Meeting Expectations ) Actions *	SHRA Performance Evaluation Test Oct			
Solutions Manager Department: UNC School of the Arts	Once you have completed the annual appraisal the second level will be notified to approve it. You will meet with your employee after the reviewer has approved the performance review.	18th Review Status: Open			
Overview	Before You Get Started Institutional Goals Individual Goals Talent Development Goals Overall Performance Attachments 🖸	Evaluation Type: Annual Program Timeframe: 03/01/23 to -			
Plan	Required fields are indicated with an asterisk (*).	Last Updated: November 07, 2022 00:40			
Supervisor Evaluation	Individual Goals	Last Completed Step: Employee Self Evaluation			
Self Evaluation Multi-rater Feedback •	Goal Name:	Co-reviewer: Add Co-			
Approvals & Acknowledgements	Streamline HR Processes Across UNCSA				
History	Weight:				
🖀 My Reviews	20%				
S My Employees' Reviews	Plan Comments:				
	Deliver process improvements across UNCSA to drive efficiencies and improvements for all hiring managers and supervisors.				
	* Goal Rating Please select  Comments				
	6				
	Goal Name:	$\times$			
	Drive Adoption of HR Management Systems	(2)			
	Weight:				
	20%				



# **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<sup>nd</sup> Level Review







#### SUPERVISOR ROLE: SEND APPRAISAL TO EMPLOYEE | Login

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







#### SUPERVISOR ROLE: SEND APPRAISAL TO EMPLOYEE | Navigate to Employee Portal



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

We	come, Keyona McNeill logout (960004263)		Welc	ome, Keyona McNeill logout (960
University of North Carolina School of the Arts	User Group: Employee	Applicant Tracking System		User Group: Employee
	Shortcuts •	Position Management     Employee Records		Shortcuts 👻
Inbox         Postings         Users         Itining Proposals         Position Requests         #           Onboarding Tasks         Special Handling Lists	2 Filled Postings Last 30 days	2 OTHER TOOLS University of North Carolina School of the Arts Employee Portal Portal Portal Portal Portal PeopleAdmin Unified Insights Applicant Tracking System Balanced Hiring PeopleAdmine Unified Insights	Users 2 Hiring Proposals 1 Position Requests 8 I Handling Lists Played.	2 Filled Postings Last 30 days
Watch List         Postings         Hiring Proposals         Position Requests           SEARCH	Applicants Per Day Last Week	Postuon wan agemenk	Postings Hiring Proposals Position Requests Unwatch Posings played.	Applicants Per Day Last Week
	Sun Mon Tue Wed Thu Pri Sat			Bun Mon Tue Wed Thu Pri Inbox Items 11 1 1



# <u>STEPS</u>

- **1.** Review Action Items List
- 2. Click Item Link with Employee

Name to Open Appraisal

University of North Carolina School		Go to oniversity of North	carolina school of the Arts P	ik site i copicAdmin
of the Arts Employee Portai	Home 3 Performance - Progress Notes		Hello, <b>Keyon</b>	a My Account Log Ou
	Welcome to the Employee Portal, Keyona McNeill			
S My Reviews	Your Action Items			
Source State		_		
	Start typing to search			
$\sim$	Item	Description	Due Date	Status
(2)	SHRA Performance Evaluation Test Oct 18th for Aretha Sutton	Send Appraisal to Employee	n/a	Available
( 4 )	SHRA Performance Evaluation Test Oct 18th for Cappi Shelton	Supervisor creates the plan	n/a	Available
	SHRA Performance Evaluation Test Oct 18th for Kemora Brownlee	Supervisor creates the plan	n/a	Available
	4			



#### SUPERVISOR ROLE: SUPERVISOR/EMPLOYEE PLAN MEETING | Send Appraisal & Conduct Face-to-Face Review

# **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







