

**Sign In:**

- Click the Talent@System Office tile on the MyApps page, or
- Use the direct link: <https://northcarolina.csod.com/samldefault.aspx?oid=1>
- Sign in using your single sign-on System Office ID and password.

**Welcome Page:**

- You will enter Talent@System Office at the Welcome Page.
- The Welcome page is your central hub for learning management, performance management, and recruitment.
- For performance-related items, you can:
  - (1) Select assigned performance tasks from your **To Do List**, or
  - (2) under the **Performance** tab on the main menu bar, scroll down to and click on **Performance Reviews**.

**THE UNC SYSTEM**

Home Learning Performance Reports Recruit

Goals  
2 Performance Reviews  
Development Plans  
Review Sign Off  
Check-Ins

Quick Links  
Browse for Training  
Educational Benefits

Learner Home View My Transcript Help Desk

**Talent@System Office**  
The UNC System Office Human Resources Division welcomes you to our new employee learning system, which supports continuous employee

| To Do List                                    | Due       |
|---|-----------|
| For [redacted] Write 2021-22 Performance Plan | 7/31/2021 |
| For [redacted] 2021-22 Performance Plan       | 7/31/2021 |

Search Training by Subject  
Accountability, Compliance, and Ethics  
Professional & Career Development  
Communication  
Customer Service  
Expertise and Job Skills  
Human Resources

What's Next for Cornerstone  
In the next several months, you'll see modules for both performance management and recruiting, including applicant tracking, added here. Keep checking back for additional functionality!



**Performance Review**

- The Performance Review page will list all currently assigned performance tasks for the employee or manager.
- The manager is assigned the first step to begin each annual appraisal.
- Each assigned step is shown as a row on the table, and the columns to the right will show the due date for the step.
- In the first column, click on the listing for the appraisal you want to write.
- *To view completed plans and appraisals, check the “Completed” box under the search bar.*

**Performance Review Summary - [Redacted]**

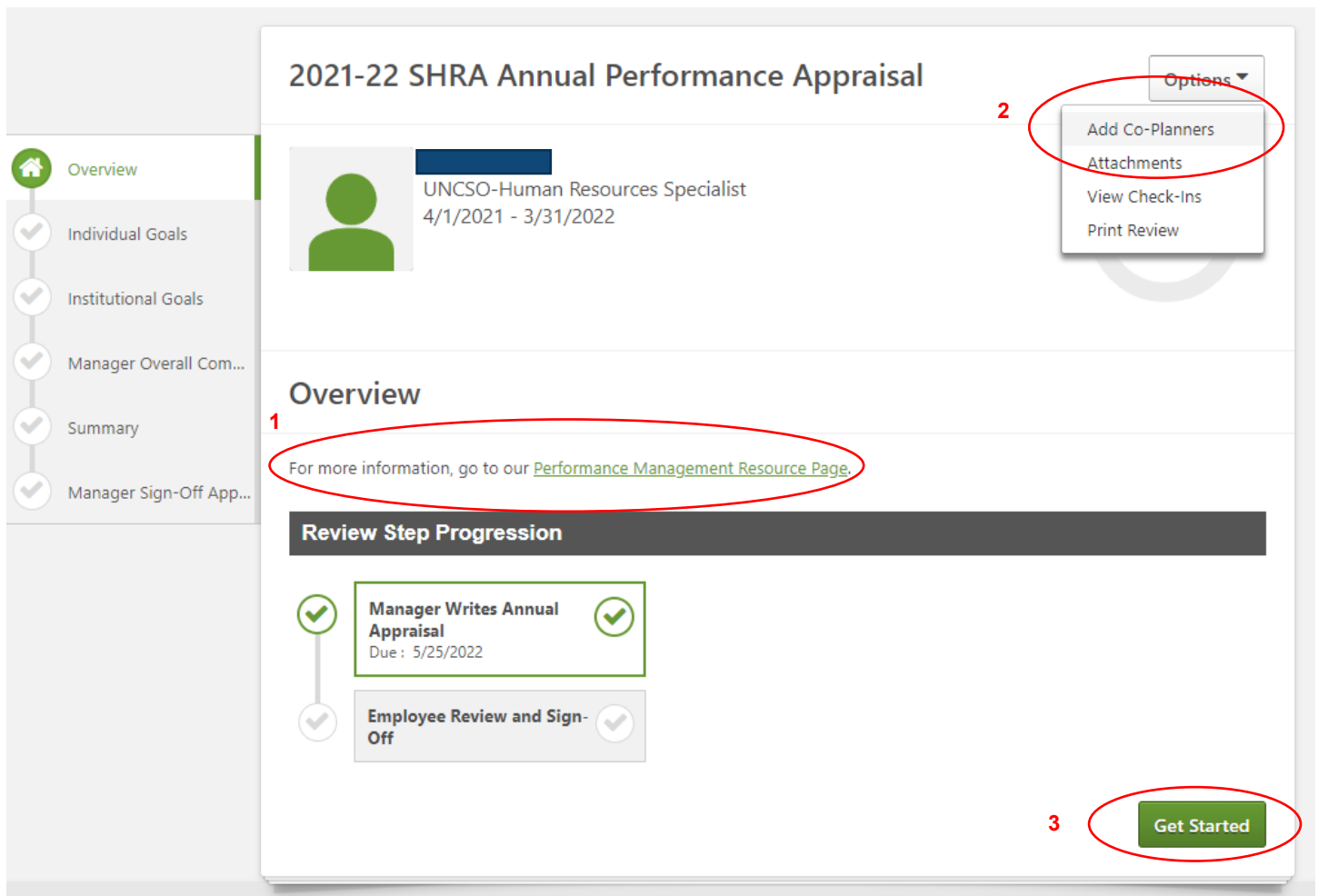
Title:

Status:
  Not Started
  In Progress
  Completed
  Incomplete
  Expired

| Title   | Description                                      | Status      |
|---|--|-------------|
|  For [Redacted] - Write 2021-22 Annual Performance Appraisal | SYSTEM 2021-22 SHRA Annual Performance Appraisal | Not Started |
|  For [Redacted] - Write 2022-23 Performance Plan             | SYSTEM 2022-23 SHRA Performance Plan             | Not Started |

**Annual Appraisal Starting Page**

- At the bottom are the two steps of the workflow: *Manager Writes the Annual Appraisal* and *Employee Review and Sign-Off*.
- The column on the left shows the pages that will be reviewed within the step.
- For more information, there is a link (1) to the [performance management resource page](#).
- **Co-Planner (Optional):** To share the annual appraisal with another manager (for example, the second-level supervisor or a co-manager), go to (2) the **Options** tab and select **Add Co-Planner**. A pop-up menu will appear to allow you to search for the name of a System Office employee. A Co-Planner can do all the tasks assigned to the employee’s manager, including editing the annual appraisal and signing off on the appraisal. The employee receiving the appraisal cannot be assigned as a Co-Planner.
- To begin writing the appraisal, (3) select **Get Started**.



2021-22 SHRA Annual Performance Appraisal

UNCSCO-Human Resources Specialist  
4/1/2021 - 3/31/2022

Options

- Add Co-Planners
- Attachments
- View Check-Ins
- Print Review

Overview

1 For more information, go to our [Performance Management Resource Page](#).

Review Step Progression

- Manager Writes Annual Appraisal (Due: 5/25/2022)
- Employee Review and Sign-Off

3 Get Started

### Enter Ratings for Individual Goals

- Every employee must have at least 3 individual goals each performance cycle. SHRA employees cannot have more than 5 goals. EHRA employees generally should have no more than 5.
- Note that SHRA employees will have weights assigned to each individual goal. EHRA employees will not have weights (the goals will be equally weighted on the annual appraisal).
- The "Goal Progress" bar functionality is required to be used; you can leave it at 0%.
- For each Individual Goal, click the rating level (1 star = not meeting; 2 stars = meeting; 3 stars = exceeding). After you click on the star, the text below the row of stars will show the rating level.
- If a goal was canceled, you can check the box next to (1) **Not Rated**. Because the total percent for the remaining goals for an SHRA employee must equal 100%, so you will need to edit the (2) **Weights** of the remaining goals to ensure that the rated goals add up to 100%. You will receive an error message when attempting to sign-off on the appraisal if the totals do not add up. (EHRA goals are not weighted, so if an EHRA goal is marked "not rated," then it will be ignored for the ratings calculation.)
- If marking goals as not rated results in the employee having fewer than 3 remaining goals, please contact Employee Relations for assistance.

#### Organization Learning & Development

1. Become proficient in the use of the Cornerstone platform for learning management and performance management modules, and continue to train staff and supervisors as on-site subject matter expert.

- Work with employees to develop professional development plans/career path roadmaps within the platform. Specifically work with the Education and Finance divisions on career pathing and development... [more...](#)


Goal Progress :  0%

Start Date : 4/1/2021

Due Date : 3/31/2022

[more...](#)

2 **Weight :**  %

 MEETING EXPECTATIONS

1  Not Rated

### Institutional Goals

- The next section displays the six institutional goals. For both SHRA and EHRA employees, the institutional goals will be equally weighted on the annual appraisal.
- For each Institutional Goal, click the rating level (1 star = not meeting; 2 stars = meeting; 3 stars = exceeding). After you click on the star, the text below the row of stars will show the rating level.
- For non-supervisory employees, be sure to check the “Not Rated” box next to the Supervision Goal.
- Click **Save and Continue** at the bottom of the page to move to the next section.

#### 1. Expertise ▼

- **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.



MEETING EXPECTATIONS

Not Rated

## Manager's Comments

- The manager must provide written comments regarding the employee's performance for the performance year. In particular, if the employee received any ratings of "Exceeding Expectations" or "Not Meeting Expectations," the manager's comments should include explanations for those ratings. (**Tip:** You can edit your text in the system or you can write your narrative in Word and then copy/paste into this field.)
- You can **Save and Exit** if you want to return to complete your comments at a later time.
- For SHRA employees, the manager must indicate if the employee received a disciplinary action during the performance cycle or if any of the rated goals were "Not Meeting Expectations." If YES, then the overall rating cannot equal "Exceeds Expectations" regardless of the calculated score (Human Resources will review and adjust the final rating as needed.)
- Click **Save and Continue** at the bottom of the page to move to the next section.
- The next page will show a summary of the score calculation for the employee and their final overall rating. You will be able to use the **Back** button if you need to update any assigned ratings.

## Manager Overall Comments

### Instructions to Managers:

Provide comments on the employee's overall performance for this appraisal. This should include explanations for ratings either above or below the "Meeting Expectations" level of performance.

If the employee received a disciplinary action during this performance cycle, then you must rate at least one goal related to the disciplinary action as "Not Meeting Expectations."

Once you click **Save and Continue**, the next page will show a ratings summary, including the employee's final overall rating. If you need to make an adjustment to the rating of any goal, use the **Back** button below (or the navigation bar of the left side of this section) to make the adjustment.

Did the employee receive a disciplinary action or rating of Not Meeting Expectations this cycle?

No  \*

Supervisor's Overall Performance Comments

Comments: \*

Rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Font, Size, Text Color, Background Color, Undo, Redo, Cut, Copy, Paste, Link, Unlink, Table, and Table of Contents.

Empty text area for entering comments.

Back Save and Exit Save and Continue

**Ratings Summary**

- This page shows the calculation of the final overall rating for the employee. If the manager needs to make any adjustments to the ratings, the manager can use the **Back** button of the navigation on the left side of the screen to modify the ratings for the goals.
- If everything looks correct, the manager can click **Next** to continue.

## Summary

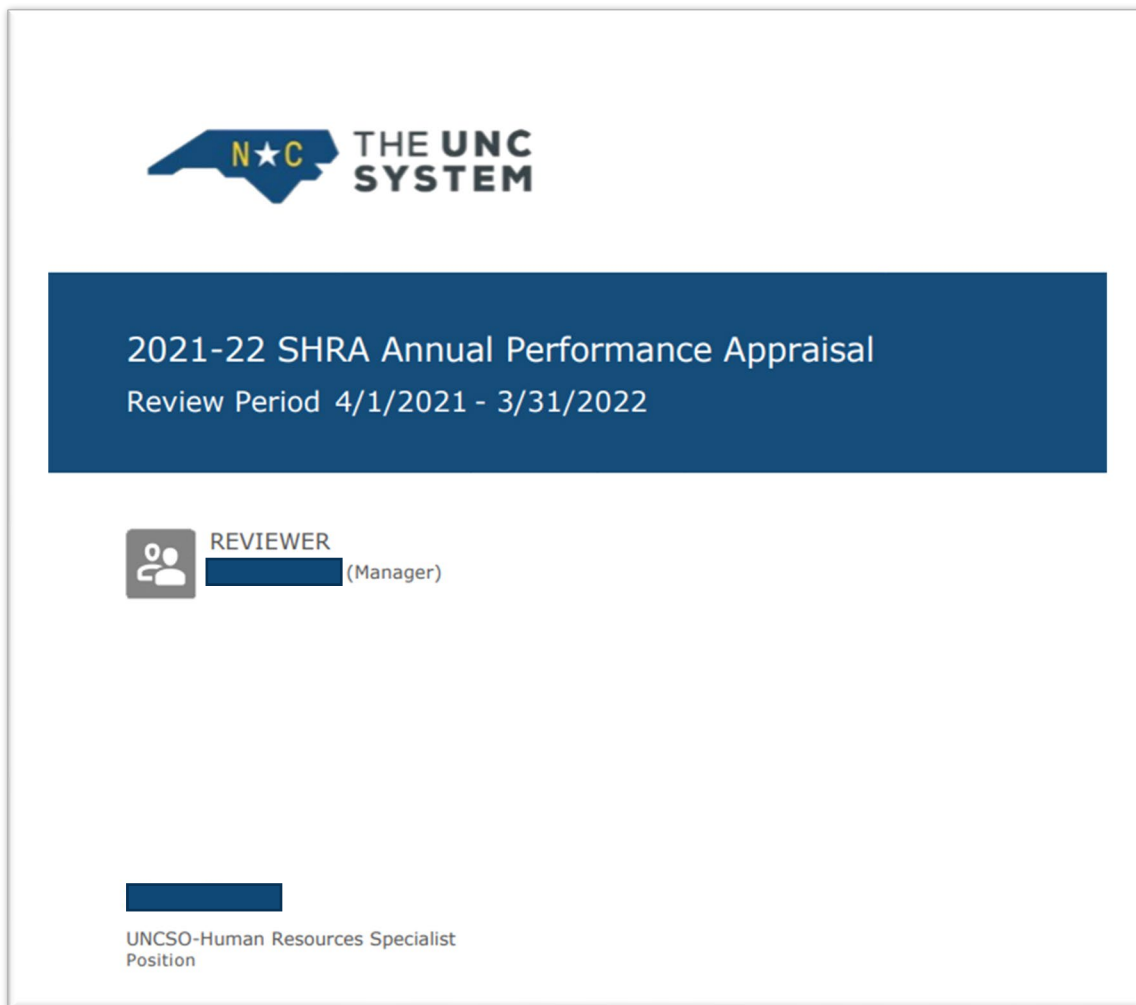
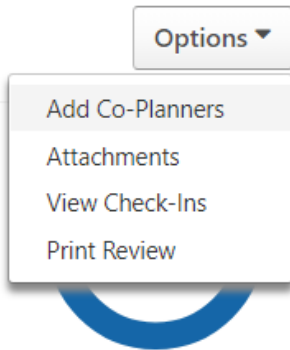
Overall Rating

**MEETING EXPECTATIONS**

|                          | Manager Writes Annual Appraisal ( 100 %)                        |
|--------------------------|---|
| Individual Goals         | <p><b>2.00 / 3.00</b></p> <p>MEETING EXPECTATIONS<br/>(50%)</p> |
| Institutional Goals      | <p><b>2.00 / 3.00</b></p> <p>MEETING EXPECTATIONS<br/>(50%)</p> |
| Manager Overall Comments | N/A   |
| Overall                  | <p><b>2.00 / 3.00</b></p> <p>MEETING EXPECTATIONS</p>           |

**Print Review (Optional)**

- Once the manager comments have been entered, the manager can review a PDF version of the entire annual appraisal.
- Under the **Options** button, click **Print Review**. (Note that the system may take a little time to generate the PDF version.)





### Manager Sign-Off

- **Important:** Once the manager clicks the **Submit** button, the appraisal will be sent to the employee, and the manager *cannot* make any further edits to the appraisal. It is important not to click **Submit** until the appraisal is finalized.
- The manager can select **Save and Exit** at the bottom of the page to save all updates to the appraisal prior to submitting.
- **Managers should conduct the annual planning session with the employee PRIOR to signing off on the appraisal in case of edits or amendments.**
- The manager can:
  - Provide the employee a Print Preview version of the appraisal before or at the planning session.
  - Walk through the appraisal onscreen with the employee in person at the planning session.
  - Walk through the appraisal onscreen via an online meeting screen share at the planning session.

The manager, after discussing the appraisal with the employee, can then make any necessary edits before signing off and submitting the appraisal.
- The manager can also review the appraisal with the Co-Planner in advance of the annual planning meeting with the employee.
- Once the appraisal is finalized, the manager can check the **Sign Off Box** and the click **Submit** at the bottom of the page to complete the appraisal.

## Manager Sign-Off Appraisal

### Instructions to Manager:

**Do not sign off and submit until you are ready to send this appraisal to the employee.** You can preview the appraisal with the employee during the performance review session or provide them a printed copy. You can continue to save edits if you have not submitted the appraisal.

**Once you sign below and submit, the employee will be able to review the appraisal and complete the process.**

Manager

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

Sign

Back

Save and Exit

Submit

- Once **Submit** is clicked, a pop-up window will appear to confirm that the manager is finished with the appraisal and ready to send to the employee for sign-off. Click **Submit** in the pop-up window to complete the action.

Submit Review ×

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You will not be able to modify once you have submitted. Are you sure that you want to submit now?

**NOTE: If the manager submits the appraisal but then needs to make further edits, the manager should contact Employee Relations ([SystemER@northcarolina.edu](mailto:SystemER@northcarolina.edu)) for assistance.**

**Confirmation Page**

- After submitting the appraisal, the manager will see a confirmation page with a link back to their Action Items so that they can continue to the next annual appraisal or other assigned action steps.

The screenshot shows a web interface for a performance appraisal. On the left is a vertical navigation menu with icons and labels: Overview, Individual Goals, Institutional Goals, Manager Overall Com..., Summary, and Manager Sign-Off App... The main content area is titled "2021-22 SHRA Annual Performance Appraisal" and includes an "Options" dropdown menu. Below the title, there is a profile card for a "UNCSO-Human Resources Specialist" with a green circular progress indicator showing "100%". The card also displays the dates "4/1/2021 - 3/31/2022". A message in the center reads: "Thank you. Once the manager and employee sign off, the annual appraisal will be complete." Below this message is a green button labeled "Go to Action Items".

**Employee Review and Sign-Off on Annual Appraisal**

- Once the manager completes the annual appraisal, the employee will receive an email notification that an action step has been assigned to them.
- Under Performance on the main menu bar, the employee can select **Performance Review** to see their assigned task.
- The employee can click on the annual appraisal listing in the first column to open the review workflow.
- The employee has five days to complete the review of the appraisal and sign off on it (see due date in the far right column).

**Performance Review Summary - [Redacted]**

My Assigned Reviews | My Personal Reviews

Title:  Q Search

Status:  Not Started  In Progress  Completed  Incomplete  Expired

| Title  | Description                                      | Status      |
|--|--|-------------|
| Review Your 2021-22 Annual Performance Appraisal | SYSTEM 2021-22 SHRA Annual Performance Appraisal | Not Started |

- The employee’s workflow is the same as the manager’s but is read-only for employees.
- The employee must go through each page of the workflow and click **Save and Continue** at the bottom of each page.

**2021-22 SHRA Annual Performance Appraisal**

Options ▾

- Add Co-Planners
- Attachments
- View Check-Ins
- Print Review

UNCSCO-Human Resources Specialist  
4/1/2021 - 3/31/2022

**Overview**

For more information, go to our [Performance Management Resource Page](#).

**Review Step Progression**

- ✓ Manager Writes Annual Appraisal (Due: 5/25/2022)
- Employee Review and Sign-Off

Get Started

## Employee Sign-Off

- After clicking **Save and Continue** on each page of the workflow, the employee will arrive at the Employee Sign-Off page.
- The instructions remind the employee that their sign-off/signature on the appraisal only indicates that they have received the appraisal and does not necessarily imply agreement with the requirements and content of the appraisal.
- For SHRA employees, the sign-off page also includes information about their grievance rights regarding annual performance ratings. (This will not appear on the sign-off pages for EHRA employees.)
- The employee can check the signature box and then click **Sign**. The employee also has the option to decline to sign.
- The employee also can, but is not required to, add comments to the appraisal.

## Employee Sign-Off Appraisal

To print your annual performance appraisal, go to [Options](#) in the upper right corner. In the drop down menu, select [Print Review](#) to download your appraisal. **Once you have completed your performance review session with your manager and reviewed the appraisal, please sign below and click [Submit](#).**

Please note that your electronic signature below only indicates that you have received this annual performance appraisal, that you understand that your signature does not necessarily imply agreement with the contents of the appraisal, and that if you choose, you may write additional comments below to include with this document.






**Grievance Rights:** Under the University SHRA Employee Grievance Policy, only a **Final Overall Rating of Not Meeting Expectations** can be grieved. To be eligible, an employee must file their grievance with the human resources office within 15 calendar days of the date of the employee's performance appraisal review session with their manager. For more information on the grievance process and alternative dispute resolution options, contact the employee relations staff in Human Resources.

Employee

- I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.
- Decline to sign

Sign

Comment

**B I U S I<sub>x</sub>** |     

Back

Save and Exit

Submit



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**Confirmation Page**

- After submitting the appraisal, the employee will see a confirmation page with a link back to their Action Items so that they can continue any other assigned action steps.
- The employee can click on the **Options** button to print a PDF version of the entire annual appraisal. Note that the system may take a few moments to generate the PDF.

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## 2021-22 SHRA Annual Performance Appraisal

Options ▾



UNCSO-Human Resources Specialist  
4/1/2021 - 3/31/2022



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Thank you. Once the manager and employee sign off, the annual appraisal will be complete.

[Go to Action Items](#)



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**Reviewing Completed Actions**

- For both managers and employees, to see completed performance plans and annual appraisals, go to **Performance** on the main menu bar and select **Performance Review** in the drop-down menu.
- On the **Performance Review** page, there is a check box for “Show completed and expired tasks.” Once this box is checked, the employee and manager will be able to see all previously completed plans and appraisals.

A screenshot of a web interface for reviewing performance. At the top, there are two tabs: "My Assigned Reviews" (which is selected) and "My Personal Reviews". Below the tabs is a search section with the label "Title:" followed by a text input field and a dark blue "Search" button with a magnifying glass icon. Below the search field is a checkbox labeled "Show completed and expired tasks".

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For more information on the performance management program and additional resources, refer to the [performance management resource page](#).

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