

Sign In:

- Click the Talent@System Office tile on the MyApps page, or
- Use the direct link: <https://northcarolina.csod.com/samldefault.aspx?ouid=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
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] - Write 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 performance plan.
- 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 plan you want to write.

Performance Review Summary - [Redacted]

My Assigned Reviews | My Personal Reviews

Title:

show completed and expired tasks

Title	Description	Status	Start Date	Due Date
For [Redacted] - Write 2021-22 Performance Plan	SYSTEM 2021-22 SHRA Performance Plan	Not Started	6/6/2021	7/31/2021
For [Redacted] - Write 2021-22 Performance Plan	SYSTEM 2021-22 SHRA Performance Plan	Not Started	6/6/2021	7/31/2021

(2 Results)

Performance Plan Starting Page

- At the bottom are the two steps of the workflow: *Manager Writes the Performance Plan* 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 performance plan 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 of the tasks assigned to the employee's manager, including editing the performance plan and signing off on the plan. The employee receiving the plan cannot be assigned as a co-planner.
- To begin writing the plan, (3) select **Get Started**.

The screenshot displays the '2021-22 SHRA Performance Plan' interface. On the left, a navigation sidebar includes 'Overview', 'Individual Goals 2021-...', 'Institutional Goals', 'Development Plan', and 'Manager Sign-Off Plan'. The main content area shows the plan title, a user profile for a 'Human Resources Consultant' (4/1/2021 - 3/31/2022), and an 'Options' dropdown menu with items: 'Add Co-Planners', 'Attachments', 'View Check-Ins', and 'Print Review'. Below this is an 'Overview' section with a link to the 'Performance Management Resource Page'. A 'Review Step Progression' bar shows two steps: 'Manager Drafts Performance Plan' (Due: 7/31/2021) and 'Employee Review and Sign-Off'. A 'Get Started' button is located at the bottom right.

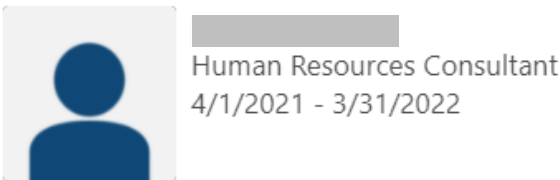
Annotations in the image include:

- Red circle 1 around the link: [Performance Management Resource Page](#).
- Red circle 2 around the 'Options' dropdown menu.
- Red circle 3 around the 'Get Started' button.

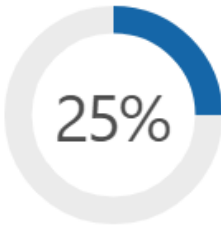
Enter Individual Goals

- 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).
- To add Individual Goals, click on the (1) **Add Goals** button.

2021-22 SHRA Performance Plan

Options ▾


Human Resources Consultant
4/1/2021 - 3/31/2022



25%

Individual Goals 2021-22

1 Add Goals

Instructions to Managers:
Set no fewer than 3 and no greater than 5 individual goals for this annual performance cycle. Goals should be based on key business needs and strategic goals for the current cycle. **Weight each goal.** The total weight of the Individual Goals must equal 100%, with no goal being less than 10%.
Click [Add Goals](#) in the upper right-hand part of this section to add a new goal. You can also set individual and team goals from the menu bar above ([Performance](#) > [Goals](#)).

Adding Goals

- **Goal Title:** Enter a title for the goal.
(Recommended: For easier readability on the printed version of the plan, write the Goal Title in ALL CAPS.)
- **Goal Description:** Write a short description of the goal requirements and key deliverables. You can copy/paste text from other sources and can use basic formatting options (bold, italic, underline, bullets, etc.). The text box can expand (drag the arrow at the bottom right corner).
- **Start/End Dates:** The dates will default to the start/end dates of the performance cycle
 - SHRA: April 1 through March 31
 - EHRA: July 1 through June 30
 The manager can modify the dates within those start/end dates or can indicate due dates within the Goal Description.
- **Weight:** Only goals for SHRA employees must be assigned a weight.
- **Attachments** (optional): The manager can attach up to three documents as resource information for this goal (for example, a template/report format or a project specifications guide).
- **Save:** Once the goal is written, click on Save to return to the Individual Goals page.
- See the [performance management resource page](#) for additional guidance on writing individual goals.

All fields marked "*" are required

Goal Title *

CREATE FACILITIES TRACKING SYSTEM

Goal Description

B I U S I_x **¶** **☰** **☰** **☰** **☰** **ABC**

As part of your responsibilities to assist with the administration of facilities requests, design a ticketing and tracking system for all facilities requests in order to triage and resolve facilities requests more efficiently and effectively so that our presenters, participants, and colleagues can productively work in a pleasant and conducive environment.

- Work with IT group to create facilities email request system to track work orders
- Log requests in database within one hour of receipt
- Triage requests and respond at least 85% of the time within 2 hours of receipt
- Tracking system should be operational by March 31

Start Date **Due Date *** **Weight ***

4/1/2021 3/31/2022 30

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

Comments

Add Comment

Cancel Save

- Each new goal will display on the individual goals page.
- Continue to **Add Goals** until completed.
- **Total Weight:** For SHRA employees, the total weight of the individual goals will display (1) at the bottom of the page. (This will not appear for EHRA goals.) If the goals do not add up to 100%, then the manager can use the down arrow (2) to the right of each goal to edit the goal and update the weight.
- Once all goals have been entered, select **Save and Continue** at the bottom of the page to move to the next section.

Individual Goals 2021-22

Add Goals

Instructions to Managers:

Set no fewer than 3 and no greater than 5 individual goals for this annual performance cycle. Goals should be based on key business needs and strategic goals for the current cycle. **Weight each goal.** The total weight of the Individual Goals must equal 100%, with no goal being less than 10%.

Click [Add Goals](#) in the upper right-hand part of this section to add a new goal. You can also set individual and team goals from the menu bar above ([Performance](#) > [Goals](#)).

CREATE FACILITIES TRACKING SYSTEM



As part of your responsibilities to assist with the administration of facilities requests, design a ticketing and tracking system for all facilities requests in order to triage and resolve facilities requests more efficiently and effectively so that our presenters, participants, and colleagues can productively work in a pleasant and conducive environment.

- Work with IT group to create facilities email request system to track work orders
- Log requests in database within one hour of receipt
- Triage requests and respond at least 85% of the time within 2 hours of receipt
- Tracking system should be operational by March 31

Exceeding expectations may include starting phase two of tracking system before end of cycle, which includes working with IT to establish tracking metrics to share with Business Manager in order to better assess facility needs.

[Show Less](#)

Goal Progress: 0%

Start Date: 4/1/2021

Due Date: 3/31/2022

Weight: 30.00%

Total Weight: 100% 1

Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.

Back

Save and Exit

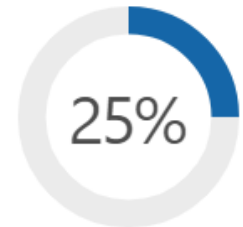
Save and Continue

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. Because these goals are system-wide, the manager cannot make changes to them, so they are shared here for review only.
- See the [performance management resource page](#) for additional guidance on applying institutional goals to an employee's work expectations.
- After reviewing the goals, click **Save and Continue** at the bottom of the page to move to the next section.



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4/1/2021 - 3/31/2022



Institutional Goals

Instructions to Managers:

Review each Institutional Goal. Institutional Goals cannot be changed by the manager and are shown below for reference. The goals will be equally weighted on the appraisal. After your review, click [Save and Continue](#).

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.

2. Accountability ▼


- **Productivity:** Completes required volume of work by established deadlines and stays productive throughout workday.
- **Autonomy:** Generally completes work with few reminders and/or infrequent oversight.
- **Prioritizing:** Takes sufficient/appropriate measures to plan and organize work, prioritize tasks, and set realistic goals.
- **Coordination:** Seeks needed information to complete work and timely communicates status with relevant parties.

Development Plans

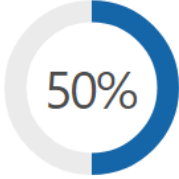
- Each employee should have at least one development item on their performance plan.
- To add a development item, click Add Objective.

2021-22 SHRA Performance Plan

Options ▾



Human Resources Consultant
4/1/2021 - 3/31/2022



50%

Development Plan

Add Objective

Instructions to Managers:

Please enter development activities for the employee for this annual performance cycle.

Click on [Add Objective](#) in the upper right-hand part of this section.

In the Objectives section below, click on the dropdown menu on the right and select [Add Action Step](#) to provide a description for the activity. If you are assigning training modules from our Cornerstone learning management system, choose [Add Training](#) from the dropdown menu and follow the prompts to add the training item.

Each employee should have at least one development goal each annual performance cycle. There is no limit on the number of development items that may be assigned. Include key objectives with each goal. Development goals are not rated on the annual appraisal.

Back

Save and Exit

Save and Continue

- A pop up window will appear. Enter a short title for the development objective (example: Attend HR Workshop) and click Save.
- The Objective will be added to the bottom of the Development Plan page.

Add/Edit Objective

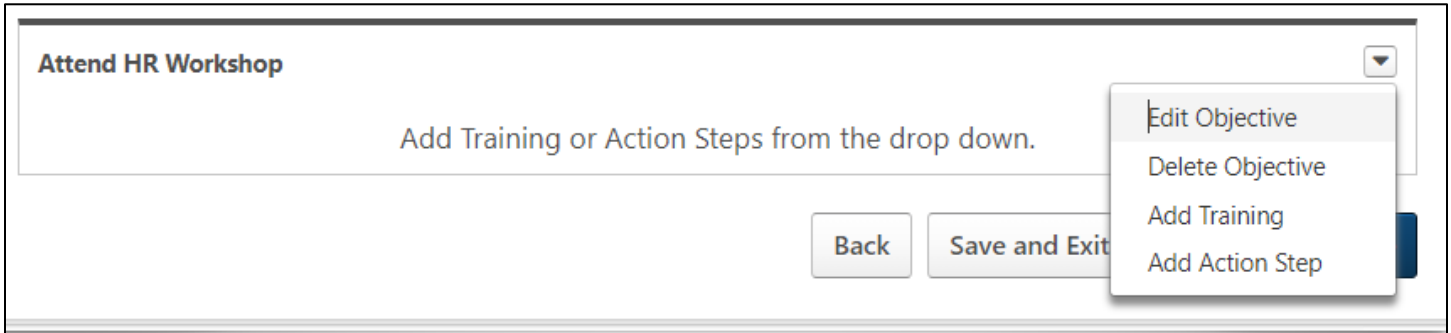
×

Objective Title *

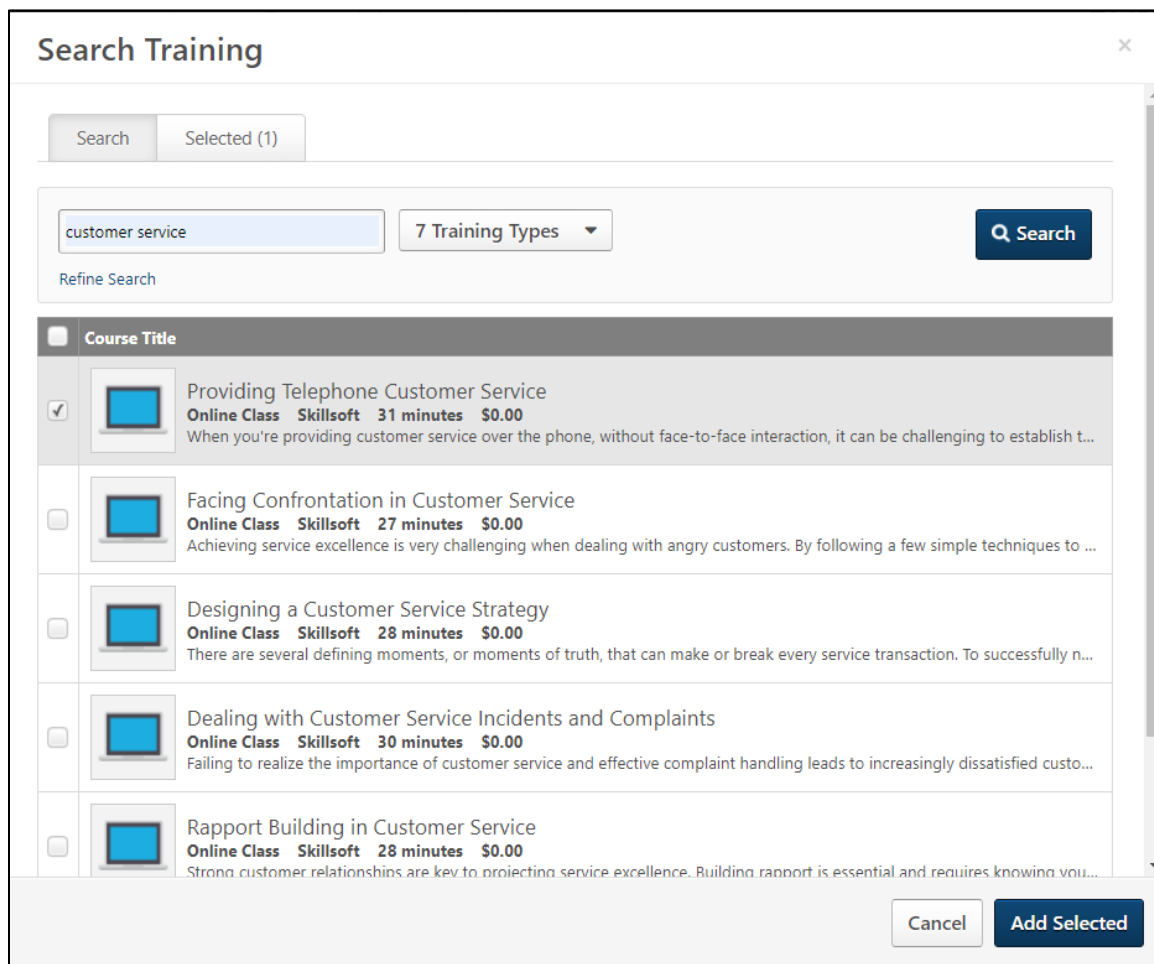
Cancel

Save

- Click on the arrow to the right of the Objective Title and select either **Add Training** or **Add Action Step**.
 - **Add Training:** The manager can assign a training program from the learning center within Talent@System Office.
 - **Add Action Step:** The manager can write a short description of what is required of the employee that will be added below the Objective Title.



- After clicking **Add Training**, a pop-up window will appear. Use the search function to enter key words for your training search. This will search for these words in the resource materials available in the learning center.
- Check the box to the left of any training items to add to the development plan and then click **Add Selected** at the bottom of the page.



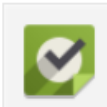
- Once all development items have been added, click **Save and Continue** at the bottom of the page to move to the next section.

Development Plan


Add Objective

Instructions to Managers:
Please enter development activities for the employee for this annual performance cycle.
Click on [Add Objective](#) in the upper right-hand part of this section.
In the Objectives section below, click on the dropdown menu on the right and select [Add Action Step](#) to provide a description for the activity. If you are assigning training modules from our Cornerstone learning management system, choose [Add Training](#) from the dropdown menu and follow the prompts to add the training item.
Each employee should have at least one development goal each annual performance cycle. There is no limit on the number of development items that may be assigned. Include key objectives with each goal. Development goals are not rated on the annual appraisal.

Attend HR Workshop

 **Select and attend one workshop provided by SHRM or CUPA this cycle.**
Due: 9/6/2021 Category: Progress: 0%

Customer Service

 **Dealing with Customer Service Incidents and Complaints**
Due: 9/6/2021

Back Save and Exit **Save and Continue**

Print Review (Optional)

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

2021-22 SHRA Performance Plan

Options ▾

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4/1/2021 - 3/31/2022

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

THE UNC SYSTEM

Individual Goals 2021-22

CREATE FACILITIES TRACKING SYSTEM

As part of your responsibilities to assist with the administration of facilities requests, design a ticketing and tracking system for all facilities requests in order to triage and resolve facilities requests more efficiently and effectively so that our presenters, participants, and colleagues can productively work in a pleasant and conducive environment.

- Work with IT group to create facilities email request system to track work orders
- Log requests in database within one hour of receipt
- Triage requests and respond at least 85% of the time within 2 hours of receipt
- Tracking system should be operational by March 31

Exceeding expectations may include starting phase two of tracking system before end of cycle, which includes working with IT to establish tracking metrics to share with Business Manager in order to better assess facility needs.

Start Date	Due Date	Goal Progress	
4/1/2021	3/31/2022	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>	0%

Weight
30%

CUSTOMER SERVICE

Represent the Center professionally at all times to serve as the "face" of the Center in order for our colleagues, clients, and students feel welcomed and attended to so that the Center is viewed positively by our stakeholders.

- Return all phone calls/respond to all messages within 4 business hours
- Check mail daily at 10a and 2p; distribute to appropriate staff members within one hour of receipt
- Ensure rooms and parking are reserved and that visitors have information needed (in terms of direction, parking, etc.) to make visit to the center positive
- Achieve positive feedback of 95% or greater on room reservation/set up process from customer service tickets related to room reservation process
- Maintain professional front office area, cleaning area and removing trash when needed

Exceeding expectations may include significant unsolicited feedback from customers on positive customer service.

Start Date	Due Date	Goal Progress	
4/1/2021	3/31/2022	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>	0%

Weight
40%

STANDARD OPERATING PROCEDURE DOCUMENTATION

Create SOPs for duties related to admissions and event planning in order to provide consistency, efficiency, and quality in our administration of these events so that we help to put a "best foot forward" in engaging and attracting top students to the

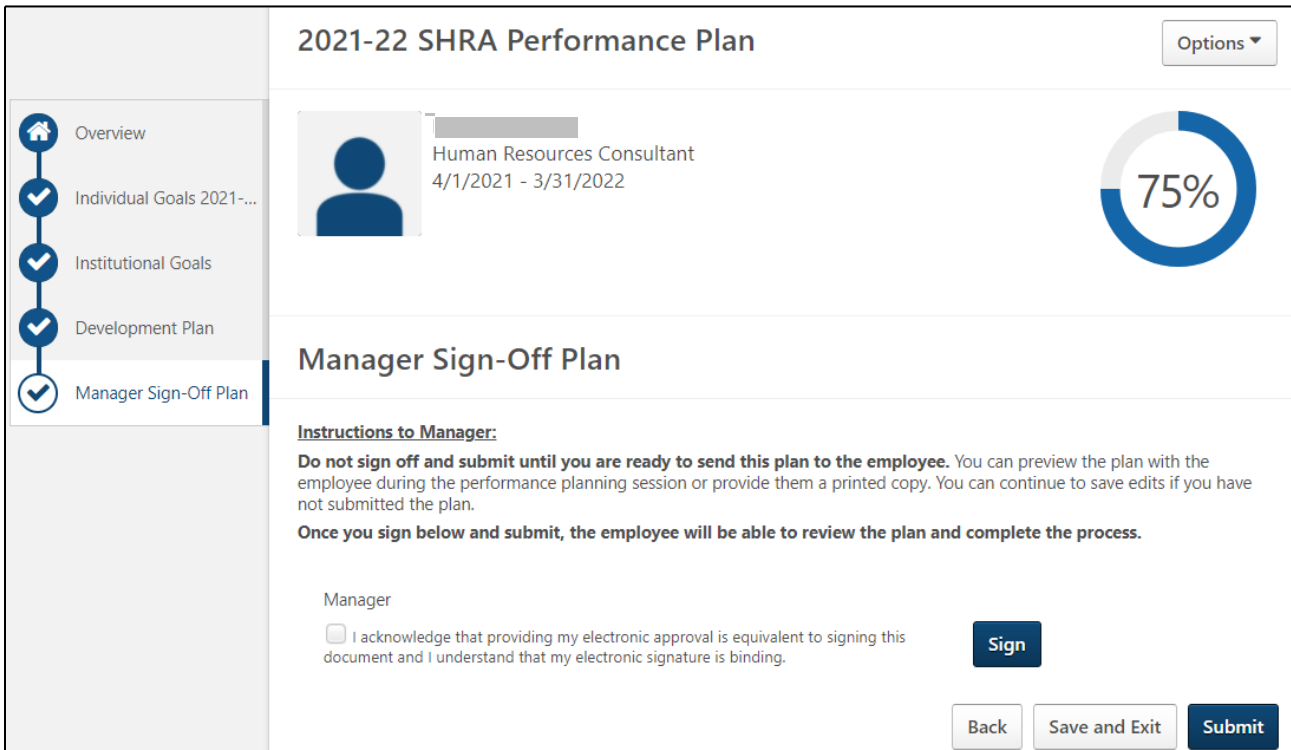
2021-22 SHRA Performance Plan
Robbie Snuggs
Page | 2 of 7

Manager Sign-Off


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

The manager, after discussing the plan with the employee, can then make any necessary edits before signing off and submitting the plan.

- The manager can also review the plan with the Co-Planner in advance of the performance planning meeting with the employee.
- Once the plan is finalized, the manager can check the **Sign Off Box** and the click **Submit** at the bottom of the page to complete the plan.



2021-22 SHRA Performance Plan Options ▾


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 4/1/2021 - 3/31/2022

75%

Manager Sign-Off Plan

Instructions to Manager:
Do not sign off and submit until you are ready to send this plan to the employee. You can preview the plan with the employee during the performance planning session or provide them a printed copy. You can continue to save edits if you have not submitted the plan.
Once you sign below and submit, the employee will be able to review the plan and complete the process.

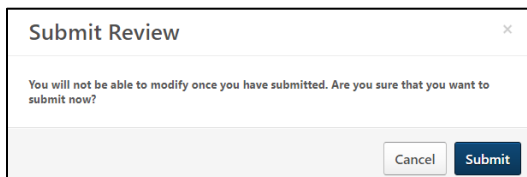
Manager

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 plan and ready to send to the employee for sign-off. Click **Submit** in the pop-up window to complete the action.



Submit Review ×

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


Cancel **Submit**

NOTE: If the manager submits the plan but then needs to make further edits, the manager can contact Employee Relations (SystemER@northcarolina.edu) for assistance.


Confirmation Page

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

2021-22 SHRA Performance Plan Options ▾



Human Resources Consultant
4/1/2021 - 3/31/2022



Thank you. The performance plan has been sent to the employee. Once both the supervisor and employee have signed off, the plan will be complete.

[Go to Action Items](#)

Employee Review and Sign-Off on Performance Plan

- Once the manager completes the performance plan, 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 performance plan listing in the first column to open the review workflow.
- The employee has five days to complete the review of the plan and sign off on it (see due date in the far right column).

Title	Description	Status	Start Date	Due Date
Review Your 2021-22 Performance Plan	SYSTEM 2021-22 SHRA Performance Plan	Not Started	6/6/2021	6/11/2021

(1 Result)

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

2021-22 SHRA Performance Plan Options

Human Resources Consultant
4/1/2021 - 3/31/2022

0%

Overview

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






Review Step Progression

- ✓ Manager Drafts Performance Plan (Due: 7/31/2021)
- ✓ Employee Review and Sign-Off


Get Started

Employee Sign-Off

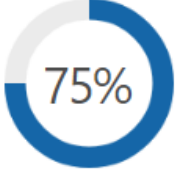
- At the end of the workflow, the employee will arrive at the Employee Sign-Off page.
- The instructions remind the employee that their sign-off/signature on the plan only indicates that they have received the plan and does not necessarily imply agreement with the requirements and content of the plan.
- 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 plan.
- The employee can click on the **Options** button to print a PDF version of the entire performance plan. Note that the system may take a few moments to generate the PDF.

-  Overview
-  Individual Goals 2021-...
-  Institutional Goals
-  Development Plan
-  Employee Sign-Off Plan

2021-22 SHRA Performance Plan Options ▾



Human Resources Consultant
4/1/2021 - 3/31/2022



Employee Sign-Off Plan

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

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

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_x
☰ ☲ ☱ ☴ ☵ ☶
☰ ☲ ☱ ☴ ☵ ☶
ABC

Back
Save and Exit
Submit

Confirmation Page

- After submitting the plan, 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 screenshot shows a confirmation page for a performance plan. At the top left, it says "2021-22 SHRA Performance Plan" with an "Options" dropdown menu to the right. Below this, there is a profile card for a "Human Resources Consultant" with a blue silhouette icon and the dates "4/1/2021 - 3/31/2022". To the right of the profile card is a large blue circular progress indicator showing "100%". Below the profile card, a message reads: "Thank you. The performance plan has been sent to the employee. Once both the supervisor and employee have signed off, the plan will be complete." At the bottom center, there is a dark blue button labeled "Go to Action Items".

Reviewing Completed Actions

- For both managers and employees, to see completed performance plans, 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.

The screenshot shows the search and filter options on the Performance Review page. At the top, there are two tabs: "My Assigned Reviews" and "My Personal Reviews". Below the tabs, there is a "Title:" label followed by a text input field. To the right of the input field is a dark blue button with a magnifying glass icon and the text "Search". Below the input field and search button, there is a checkbox labeled "Show completed and expired tasks".

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