1. **Creating the Plan.** Log in ECU PeopleAdmin system at [https://ecu.peopleadmin.com/hr/shibboleth](https://ecu.peopleadmin.com/hr/shibboleth). Sign in using your PirateID and Passphrase.

   Note: If you are logging in by clicking the link provided in an automated PeopleAdmin email, you will have to first click “SSO Authentication” to access single sign-on.

2. Click **Go to the East Carolina University Employee Portal** located in the upper right-hand corner.

3. Once in the employee portal you will see the **Your Action Items** screen as seen below. Start the process by selecting **Performance Plan Creation** by the name of the employee whose Performance Plan you would like to create. You may also select **View** to access Performance Plan creation.
4. Complete each tab in the performance Plan. You can navigate through the Performance Plan by either selecting the tabs individually or clicking **Next** at the bottom right-hand side of each tab.

   - **Policy Components**: This tab contains the five major components of the policy.
   - **Schedule**: This tab contains a workflow graphic explaining the SHRA Performance Management workflow and a schedule of when each performance management task should be completed.
   - **Institutional Goals**: Enter the weight for each Institutional Goal as well as clarification of expectations and/or performance improvement plans. Remember, each Institutional Goal must be weighted at least 5% and the total for all Institutional Goals must equal 50%.
   - **Individual Goals**: Enter a title, description, and weight for at least three but no more than five Individual Goals. After each Individual Goal you must click Add Entry to add the next one. Remember each goal must be weighted at least 5% and the total of all Individual Goals must equal 50%.
   - **Talent Development Plan**: Enter a Talent Development Plan for the employee if applicable.
   - **Calibration**: Selecting Yes to Confirm Plan Calibration confirms that the employee’s Performance Plan is consistent with the performance expectations set for occupants in similar positions per the Calibration session.

*Once you have all the employee’s goals in the plan, click **Complete**.

5. **Second-Level Reviewer Approves**. The Second-Level Reviewer will have the opportunity to review the Plan and return it to the supervisor if edits are required. If the Plan does not require any changes, the Second-Level Reviewer will click **Approved**.

6. **Plan Review Meeting**. The supervisor will schedule a meeting with the employee to discuss the Performance Plan. Log into ECU’s PeopleAdmin system. Select **Go to the East Carolina University Employee Portal**. Once in the **Your Action Items** screen, either click **Plan Review Meeting** or **View** next to the employee’s name.

   Clicking **Complete** on the Plan Review Meeting page will release the Performance Plan to the employee for his/her review. It is recommended that the supervisor release the Performance Plan to the employee before discussion.
7. **Employee Acknowledgment.** Once the supervisor and employee have met to review the Performance Plan, the employee will acknowledge the Performance Plan.

8. **Creating the Review.** Log into the ECU PeopleAdmin system. Click **Go to the East Carolina University Employee Portal.** On the **Your Action Items** page select **Supervisor Review** or click **View** next to the employee’s name.

9. Complete all tabs in the Review. You can navigate through the performance plan by either selecting the tabs individually or clicking **Next** at the bottom right-hand side of each tab.

- **Policy Components**: This tab contains the five major components of the policy.
- **Schedule**: This tab contains a workflow graphic explaining the SHRA Performance Management workflow and a schedule of when each performance management task should be completed.
- **Institutional Goals**: Enter a rating for each of the Institutional Goals. You may enter explanatory comments either in the comment boxes provided or in the overall comment section at the end of the review.
- **Individual Goals**: Enter a rating for each of the Individual Goals. You may enter explanatory comments either in the comment boxes provided or in the overall comment section at the end of the review.
- **Talent Development Plan**: Provide any applicable comments related to the employee’s Talent Development Plan.
- **Overall Performance Comments**: Enter overall performance comments in the comment box provided. Select the appropriate answer to the two questions below the comment box.
- Remember, if the employee has an active Disciplinary Action or received a rating of “Not Meeting Expectations” for any Institutional or Individual Goal you will have to override in the **Final Ratings** tab at the end to no higher than “Meets Expectations.”

- **Calibration**: Selecting **Yes** to Confirm Review Calibration confirms that the employee’s Review is consistent with the performance expectations set for occupants in similar positions per the Calibration session.

- **Final Rating**: Answer the first two questions related to disciplinary actions and goal ratings. Select the appropriate Final Rating. If the employee has an active Disciplinary Action or received a rating of Not Meeting Expectations for any Institutional and/or Individual Goal, he/she cannot receive an Overall Rating of Exceeds Expectations. **If the employee does not have either of those, select the rating as calculated at the top of the screen.** Clicking Complete will send the Review to the Second-Level Reviewer for review.

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**Note**

Select “Complete” when you are finished with your evaluation. Your employee’s overall rating is calculated as a weighted average of the rating of each goal.

- Was there a formal disciplinary action initiated for this employee after April 1st, 2016?
- If you answer “yes” to this question, your employee’s overall score cannot be “Exceeding Expectations.”
- Did you enter a rating of Not Meeting Expectations on ANY goal (institutional or individual)?

If you answered “yes” to either of the two previous questions AND the overall score calculation results in a rating higher than “Meeting Expectations”, you must override the overall rating to “Meeting Expectations”. This information may be entered on each individual goal and/or in the final comments.

- Final Rating
  - Please select

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This calculation does not occur until after you select “Complete” to finish the evaluation.

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10. **Second-Level Reviewer Approves**. The Second-Level Reviewer will have the opportunity to review the Supervisor Review and return it to the supervisor if edits are required. If the Review does not require any edits, the Second-Level Reviewer will click **Approve**.

11. **Supervisor/Employee Review Meeting**. The supervisor will schedule a meeting with the employee to discuss the Review. Log into the ECU PeopleAdmin system. Click **Go to the East Carolina University Employee Portal**. Once in the **Your Action Items** page select **Review Meeting** or click **View** next to the employee’s name.

Clicking **Complete** on the Review Meeting page will release the Performance Review to the employee for his/her review. It is recommended that the supervisor release the Performance Plan to the employee before discussion.
12. **Employee Acknowledgment.** Once the Supervisor and Employee have met to review the Performance Review the employee will acknowledge the Performance Review

**NOTES:**

*Required fields are denoted with an asterisk

*This version of PeopleAdmin auto-saves when you move to another tab. You will see this noted at the top of the screen in green.

*Unlike previous versions, the “Back” button now functions properly.