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. **Completing the April Probation Review.** Log into the ECU PeopleAdmin system. Click **Go to the East Carolina University Employee Portal.** On the **Your Action Items** page select **Probation Quarterly 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.

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**Supervisor Evaluation for [Employee Name]**

Since employee has not completed at least six months of employment at this time, an annual evaluation is not required. Please provide comments as needed to do complete, the Performance Plan and April Quarterly Probation Review will be closed.

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- **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:** You do not have to enter a rating for Institutional Goals since Probation Reviews do not require ratings. You may enter comments either in the comment boxes provided or in the overall comment section at the end of the review.
- **Individual Goals:** You do not need to enter a rating for Individual Goals since Probation Reviews do not require ratings. You may enter comments either in the comment boxes provided or in the overall comment section at the end of the review.
Supervisor’s Quick Steps to the Short Cycle Performance Plan and Probation Review

- **Talent Development Plan**: Provide any applicable comments related to the employee’s Talent Development Plan.
- **Overall Comments**: Explain how the employee has progressed during the quarter and/or clarify expectations for the remainder of the probationary period.

Once you have completed all of the tabs, click **Complete** at the bottom right-hand of the screen. Clicking **Complete** will release the Probation Review to the employee for his/her acknowledgement.

10. **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.