

## Your Action Items

When you reach the UNC Charlotte Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention. Note any 'Due Date(s)' indicated.

If you need to get back to **'Your Action Items'** page click the **'Home'** button at the top of your screen.

The screenshot shows the NinerTalent Employee Portal interface. At the top, there is a navigation bar with the NinerTalent logo on the left, a 'Home' button circled in red, and a 'Performance' dropdown menu. On the right side of the navigation bar, there are links for 'Go to UNC Charlotte User Site', 'PeopleAdmin', 'Hello, Charlotte', and 'Log Out'. Below the navigation bar, there is a sidebar with 'Performance' as the main category and sub-links for 'My Reviews' and 'My Employees' Reviews'. The main content area displays a welcome message and a section titled 'Your Action Items'. This section includes a search bar and a table with the following data:

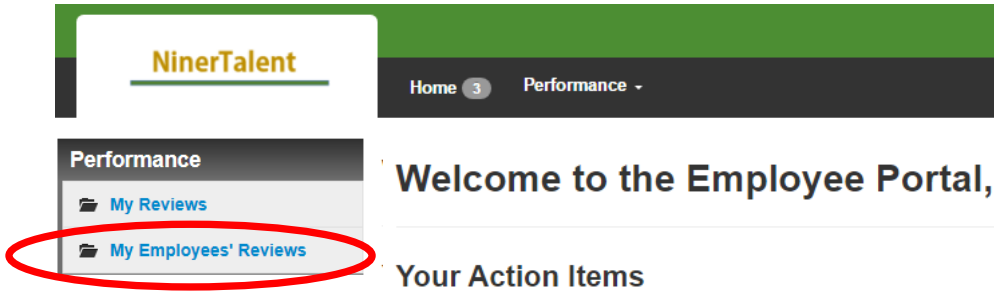
Item	Description	Due Date	Status	Action
2017-2018 Off Cycle Review for Norm Niner	<a href="#">Off Cycle Review</a>	n/a	Available	<a href="#">View</a>
2017-2018 Off Cycle Review for Goldie Dust	<a href="#">Off Cycle Review</a>	n/a	Available	<a href="#">View</a>
2017-2018 SHRA Annual Performance Review for Norm Niner	<a href="#">Performance Plan Creation</a>	n/a	Available	<a href="#">View</a>
2017-2018 SHRA Annual Performance Review for Goldie Dust	<a href="#">Performance Plan Creation</a>	n/a	Available	<a href="#">View</a>

At the bottom of the table, it says 'Showing 1 to 4 of 4 entries'.

Once you have completed the actions in 'Your Action Items' they will no longer appear on this screen unless it is reopened by a Human Resources administrator or is sent back to you by the Next Level Supervisor or approver of the action.

## Searching and Dashboard (My Employees' Reviews)

You can search for employee reviews by going to the 'Performance' menu at the top left of your screen. Click **'My Employees' Reviews'** to take you to your 'Reviews Dashboard'. Here you can see past and current performance review cycles and actions documented in the NinerTalent system.



When the screen below appears, it will automatically show you the current active performance cycle programs which are open. (If you notice any discrepancies, call Ext. 7-0660 or email [nt-stakes@unc.edu](mailto:nt-stakes@unc.edu).) You can monitor your performance processes easily by using the colored status tabs at the top of the dashboard. You can also get a quick look at a specific process name and owner by hovering over the colored step blocks.

**Reviews Dashboard**

Reset Program  Employee Name  Group by:  Advanced

Reporting Org Unit:  Supervisor:  Program Status:

**Status Tabs** → **All Reviews** 6 **Not Started** 0 **In Process** 3 **Complete** 0 **Overdue** 0 **Disputed** 0

**Current Program** → **2017-2018 Off-Cycle Reviews** 3

Last name	First Name	Anniversary Date	Progress	Program	Score
College	Charlotte	2004-12-06	0/3 [1] [ ] [ ]	2017-2018 Off-Cycle Reviews	
Dust	Goldie	2016-11-28	0/3 [1] [ ] [ ]	2017-2018 Off-Cycle Reviews	
Niner	Norm	2017-09-05	0/3 [1] [ ] [ ]	2017-2018 Off-Cycle Reviews	

**Current Program** → **2017-2018 SHRA STAKES Review** 3

College	Charlotte	2004-12-06	4/9 [1] [2] [ ] [ ] [ ] [ ] [ ] [ ] [ ]	2017-2018 SHRA STAKES Review	
Dust	Goldie	2016-11-28	4/9 [1] [2] [ ] [ ] [ ] [ ] [ ] [ ] [ ]	2017-2018 SHRA STAKES Review	
Niner	Norm	2017-09-05	4/9 [1] [2] [3] [4] [ ] [ ] [ ] [ ] [ ]	2017-2018 SHRA STAKES Review	

Next Level Supervisor Approves Dean Manager

Previous 1 Next

**Process Key** →  Task Not Started / Unavailable  Task Completed  Task Open  Task Disputed

The filter bar at the top of the navigation screen allows you to sort by a specific program, search for a specific employee, and/or group the information by supervisor, reporting unit, etc. The **'Advanced'** filter button gives you more sort options including **'Program Status'**. If you do not see the program you are searching for on the Dashboard go to the **'Program Status'** filter. By setting the 'Program Status' to **'All'**, you will be able to access past performance programs which have been closed as well as current programs that are still active. These programs will contain all the records that an open program would, such as performance plans, self-evaluations, and supervisor evaluations.

## Reviews Dashboard

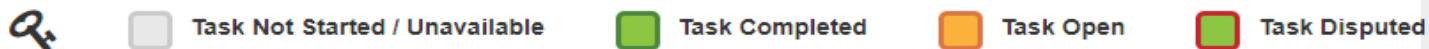
The screenshot shows the 'Reviews Dashboard' interface. At the top, there are several filter controls: a 'Reset' button, a 'Program' dropdown set to '2017-2018 SHRA STAKES', an 'Employee Name' search field with a magnifying glass icon, and a 'Group by:' dropdown set to 'Program'. The 'Advanced' filter button is circled in red, with a red arrow pointing to the 'Program Status' dropdown menu. This menu is open, showing options: 'Active', 'Closed', and 'All'. Below the filters, there is a summary bar with colored tabs: 'All Reviews' (6), 'Not Started' (0), 'In Process' (3), 'Complete' (0), 'Overdue' (0), and 'Disputed' (0). The main content area is titled '2017-2018 SHRA STAKES Review' (3) and contains a table of review records.

College	Employee	Date	Progress	Rating	Program
Charlotte		2004-12-06	4/9	1 2 3 4	2017-2018 SHRA STAKES Review
Dust	Goldie	2016-11-28	4/9	1 2 3 4	2017-2018 SHRA STAKES Review
Niner	<a href="#">Norm</a>	2017-09-05	4/9	1 2 3 4	2017-2018 SHRA STAKES Review

Select the desired employee for a particular program to access the "Overview" screen. This screen is where you will access the performance records and history.

**(Information continued on the next page)**

The “**Overview**” screen will show you all of the performance tasks that will or have occurred this cycle. It also lists the task owner, the date the task opened, the date the owner completed the task, and the due date of each task. The tasks for which you are the owner are in blue. Use the following key to identify the tasks status.



On the left side of the screen you can access any completed or open performance actions (‘**Plan**’, ‘**Supervisor Evaluation**’, ‘**Self Evaluation**’), ‘**Progress Notes**’, and action ‘**History**’. Click the link to access the desired document.

You can also find your employee’s current job description by clicking the job title, under the employee’s name, in the top left corner of the screen. (See arrow)

**NinerTalent** Go to UNC Charlotte User Site **PeopleAdmin**

Home **2** Performance ▾ Hello, Charlotte **Log Out**

**Norm Niner**  
 Supervisor: Charlotte College  
 Position Description: [Human Resources Consultant](#)  
 Department: Employee Relations

**2017-2018 SHRA STAKES Review**  
 Review Status: **Open**  
 Evaluation Type: Focal  
 Program Timeframe: 04/01/17 to 03/31/18  
 Last Updated: November 06, 2017 15:42  
 Last Completed Step: Employee Acknowledges Performance Plan

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Performance Plan Creation	Charlotte College Supervisor	2017-05-29	2017-10-05	2017-07-14
2 Next Level Supervisor Approves Performance Plan	Dean Manager Reviewing Officer		2017-11-02	2017-07-21
3 Supervisor/Employee Performance Plan Meeting	Charlotte College Supervisor		2017-11-06	2017-07-28
4 Employee Acknowledges Performance Plan	Norm Niner		2017-11-06	2017-08-04
5 Employee Self-Appraisal	Norm Niner	2018-03-01		2018-04-13
6 Supervisor Appraisal	Charlotte College Supervisor			2018-05-01
7 Next Level Supervisor Approves Appraisal	Dean Manager Reviewing Officer			2018-05-08
8 Supervisor/Employee Appraisal Review Meeting	Charlotte College Supervisor			2018-05-11
9 Employee Acknowledges Appraisal	Norm Niner			2018-05-15

**Navigation Sidebar:**  
 Overview  
 Plan  
 Supervisor Evaluation  
 Self Evaluation  
 Approvals & Acknowledgements  
 Progress Notes  
 History  
 My Reviews  
 My Employees' Reviews  
 Program Information

## Example: Review Employee Self-Appraisal

Use the “Searching and Dashboard” tips mentioned above (pages 5-7) to find the current performance program (i.e. 2017-2018 STAKES Review) in which the Employee Self-Appraisal is housed. Once you get to the ‘**Overview**’ screen, shown below, click ‘**Self Evaluation**’.

**Note: Only the questions with an asterisk (\*) were required to be answered.**

The screenshot displays the NinerTalent interface for Norm Niner. The top navigation bar includes 'Home 18', 'Performance', and 'Progress Notes'. The main content area is titled 'Task' and lists a 9-step process:

- 1 Performance Plan Creation
- 2 Next Level Supervisor Approves Performance Plan
- 3 Supervisor/Employee Performance Plan Meeting
- 4 Employee Acknowledges Performance Plan
- 5 Employee Self-Appraisal
- 6 Supervisor Appraisal
- 7 Next Level Supervisor Approves Appraisal
- 8 Supervisor/Employee Appraisal Review Meeting
- 9 Employee Acknowledges Appraisal

On the left, a navigation menu is visible with the following items: Overview, Plan, Supervisor Evaluation, Self Evaluation (circled in red), Approvals & Acknowledgements, Progress Note, History (with a 'Program Information' tooltip), My Reviews, and My Employees' Reviews. A red arrow points from the 'Self Evaluation' menu item to the '5 Employee Self-Appraisal' task in the main list. Another red arrow points from the 'Position Description: Human Resources Consultant' text to a tooltip that says 'Click link to access current Position Description'.