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Navigating NinerTalent Performance Module

(video available)

NinerTalent is UNC Charlotte’s Human Resources Management System (HRMS) for Employees and Hiring Managers. The type of NinerTalent access you have is determined by your position and may be requested through your supervisor or the Business Officer in your college/division by filling out the NinerTalent User Group Request form. For information on getting started in NinerTalent please review the User Guides on the NinerTalent website.

The **UNC Charlotte Employee Portal** in NinerTalent is specifically used to maintain yearly performance plan and appraisal information. It can be used to find both current and past performance actions including performance plans, evaluations, approvals & acknowledgments, progress notes, etc.

Logging in and Accessing the Employee Portal

Log into NinerTalent ([http://jobs.uncc.edu/hr](http://jobs.uncc.edu/hr)) using your NinerNet credentials:

Once logged in, click the ‘...’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.
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.

‘Item’ indicates the review type (Annual, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. Select the item link that corresponds to the process step (“description”) that needs to be completed for a specific employee.

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

To find action you have already completed, click ‘My Employees’ Reviews’ to access the ‘Review Dashboard’.

**Searching and Dashboard**

*video available*

You can search for employee reviews by going to the links 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 programs 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@uncc.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 step name and owner by hovering over the colored step blocks.

The filter bar at the top of the navigation screen allows you to sort by a specific program, search for an employee, and/or group the information by supervisor, reporting unit, etc. The ‘Advanced’ filter button gives you more sort options including ‘Program Status’. By setting the ‘Program Status’ to ‘All’, you will be able to access past and current performance programs which will contain records such as performance plans and evaluations.
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.

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)

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.
Using Progress Notes

(video available)

At any time after your employee has acknowledged his/her performance plan, you may use the Progress Notes functionality to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching sessions.

Progress Notes are your personal records to assist with completion of the performance evaluation process and/or off-cycle reviews (performance check-ins). They are employee-specific, and are only viewable by the employee if you share the item with them via the share button. However, all documented items should be professional and performance-related. (Note: Progress Notes are not intended to serve as formal disciplinary action – only documentation of performance-related issues and/or discussions. Formal disciplinary action must be initiated outside of this system.)

To add Progress Notes, log into Niner Talent (http://jobs.uncc.edu/hr).

Once logged in, click the ‘...’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.

![Login and Portal Images]
To document a progress note for yourself or any of your employees you can click the ‘Progress Notes’ button at the top of your screen.

Once selected, the following screen will appear. Click the blue ‘Create Progress Note’ button on the right side of your screen.

Enter all relevant information, add an attachment (if desired), and click ‘Create’.
EHRA Performance Management

The *UNC Charlotte Employee Portal* is used to: 1) **Complete** an EHRA Appraisal; and to 2) **Document** performance feedback (Progress Notes).

**EHRA Annual Review Process Steps**

*If required by your leadership, ensure your appraisal is approved prior to releasing it to your employee.*

**EHRA Supervisor Appraisal**
To log into NinerTalent (http://jobs.uncc.edu/hr).

Once logged in, click the ‘...’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.

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.

Remember! Before you go to complete your ‘Supervisor Appraisal’, you should review the Employee Self-Appraisal to see how the employee feels they performed during the cycle and what future job priorities and career goals they have for the new cycle. EHRA Self-Appraisal forms can be found on the STAKES website.
‘Item’ indicates the review type (EHRA Performance Evaluation). ‘Description’ indicates the current process step and/or required action. To complete the appraisal, select the item for the desired employee with the description ‘Supervisor Appraisal’.

Once selected, the Supervisor Evaluation will appear. You will see the following on this page:

- Instructions in blue that will give you general information about the action you are about to perform
- Four (4) tab sections that make up the Supervisor Evaluation
- Helpful links & instructions to help you complete this performance evaluation
On the first two tabs, Institutional Goals and Goals & Objectives, you will enter a ‘Rating’ and ‘Comments and/or Performance Improvement Plans’. *

<table>
<thead>
<tr>
<th>Rating</th>
<th>Required Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeding Expectations</td>
<td>Comments describing the employees work this cycle, which support a rating of exceeding expectations as it is described in the institutional goals guidelines or in your individual goals description.</td>
</tr>
<tr>
<td>Meeting Expectations</td>
<td>“n/a” (comments not required, but field requires an entry)</td>
</tr>
<tr>
<td>Not Meeting Expectations</td>
<td>Comments describing the performance that led to this rating and a Performance Improvement Plan (PIP). The PIP should include any actions that must be taken for the employee to meet the performance expectation and/or to assist in getting them to those performance expectations (i.e. any retraining, performance actions &amp; deadlines) and a timeframe in which this performance issue be resolved.</td>
</tr>
</tbody>
</table>

*Please Note! The rating comment instructions do not apply to the Institutional Goals. Supervisors are not required to enter comments to justify institutional goal ratings for EHRA employees. However, the overall comments at the end of this appraisal should support the ratings entered.

Institutional Goals

The first tab is “Institutional Goals”. You will be required to enter a ‘Rating’ and you may enter ‘Comments and/Performance Improvement Plan’ information if desired. If you do not want to comment, please enter an “n/a” in the comments box to complete the field entry.
When you reach the bottom of each page and have completed comments for each goal, you may click ‘Save Draft’ or ‘Next’. Choosing the ‘Save Draft’ button will allow you to come back and complete the evaluation at a later point in time. Choosing the ‘Next’ button will move you forward to the next tab section. Note: Choosing the ‘Next’ button will enable auto save for the work just completed.

Goals & Objectives

The second tab section is ‘Goals & Objectives’. On this tab, you will identify any goals and objectives that were established and communicated to your employee to accomplish this cycle. Three to five goals is recommended.

You will be required to enter a brief description or ‘Goal Name’, a ‘Rating’, and provide ‘Comments’ that support the employee’s performance in accomplishing the goal this cycle. You may use the ‘Attachments’ link to attach documents (PDF format) that define the performance goals or accomplishments in meeting the goal.
The third tab section is ‘Professional Development Activities’. On this tab, you will describe any job-related personal or professional or development activities that the employee has participated in this cycle. **Comments are required.**

**Overall Performance**
The fourth tab section is ‘Overall Performance’. On this tab, you will provide comments regarding the employee’s overall performance during the cycle. **COMMENTS ARE REQUIRED!**

SAVE your comments when done, then you may use the ‘Attachments’ link to attach documents (PDF format). If your comments are contained in the document you may enter “Please see attached document” in the ‘Comments’ box.

When done click the blue ‘Actions’ button and select ‘Complete’

When you select the ‘Complete’ button, the following warning will appear. Please ensure all necessary information has been entered/completed prior to clicking ‘OK’.

If the action goes through successfully you will see a green bar at the top of your screen that says “**The Supervisor Evaluation has been marked complete**”. (See picture below.)

From here you can **save the document as a PDF**. Click the blue ‘Actions’ button and select ‘Print’.
When the Print screen appears, click the ‘Destination’ dropdown and select ‘Adobe PDF’ or ‘Save as PDF’. You can then send the document to leadership to review if it is required.

Note: Your Evaluation document will now go to your ‘Action Items’ or ‘Home’ screen until you are ready to ‘Release Appraisal to Employee’. This will allow you to get any necessary approvals from your supervisor or department leaders and schedule to meet with your employee.
To get back to NinerTalent, click ‘Go to UNC Charlotte User Site’ in the top right hand corner:

Supervisor Releases Appraisal to Employee

After clicking ‘Complete’ on the ‘Supervisor Appraisal’ task, the appraisal will go back to the supervisor’s ‘Action Items’ or ‘Home’. The ‘Item’ indicates the review type (EHRA Performance Evaluation). ‘Description’ indicates the current process step and/or required action (‘Release Appraisal to Employee’). Select the linked item for the desired employee with the description ‘Release Appraisal to Employee’.

The action item will give you access to the following options –

- Release the appraisal to employee (‘Approve’)
- Print or Save document as a PDF (‘Print’)
- Reopen appraisal for editing (‘Return’)

Welcome to the Employee Portal, Gary Stinnett

Your Action Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-2019 EHRA Performance Evaluation for Alyson Ebaugh</td>
<td>Release to Employee</td>
</tr>
</tbody>
</table>
• **To release the action to the employee**, click the blue ‘Actions’ button and select ‘Approve’. This will send the action to the employee immediately for review and acknowledgement.

• **To Print or Save the document as a PDF** click the blue ‘Actions’ button and select ‘Print’. If you would like to save the document as a PDF, when the Print screen appears, click the ‘Destination’ dropdown and select ‘Adobe PDF’ or ‘Save as PDF’. You can then send the document to leadership to review if it is required.
• To reopen the appraisal, go to the end of the appraisal document and put a short comment in the comments box to satisfy the require entry. Then click the blue ‘Return’ button.

This will move the action back to the ‘Supervisor Appraisal’ step. Click the ‘Supervisor Appraisal’ link to access the document. You will also be able to find this action back on your ‘Action Items’ or ‘Home’ screen.

To get back to NinerTalent, click ‘Go to UNC Charlotte User Site’ in the top right-hand corner:
Employee Acknowledges EHRA Performance Appraisal

Once the Supervisor releases the performance appraisal it will go the employee for acknowledgement. It is expected that supervisors will go over the appraisal with their employee, before the employee acknowledges it in NinerTalent.

**Acknowledge or Dispute**

Choosing ‘**Acknowledge**’ or ‘**Dispute**’ brings the Performance appraisal process to successful completion. The appraisal may only be revised if the HR Administrator in charge of this process reopens it.

**Note:** Emails are not sent to the supervisor to notify them that the employee has acknowledged the appraisal. You will only be aware of this if the employee notifies you themselves, or if you look at the performance dashboard.

You can identify which employees have acknowledged or disputed their appraisals by looking at the ‘**My Employees’ Reviews’ Dashboard.’ Click on the employee’s name and then the ‘Approvals & Acknowledgements’ link on the navigation pane to access the comments. [See Searching the Dashboard](#) for more information on how to navigate NinerTalent.

![Task Not Started / Unavailable](image)

![Task Completed](image)

![Task Open](image)

![Task Disputed](image)

<table>
<thead>
<tr>
<th>All Reviews</th>
<th>Not Started</th>
<th>In Process</th>
<th>Complete</th>
<th>Overdue</th>
<th>Disputed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Anniversary Date</th>
<th>Progress</th>
<th>Program</th>
<th>2020-2021 EHRA Performance Evaluation Test 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ebaugh</td>
<td>Alyson</td>
<td>2015-01-12</td>
<td>1/3</td>
<td>1</td>
<td>2020-2021 EHRA Performance Evaluation Test 3</td>
</tr>
<tr>
<td>Kaylor</td>
<td>Kristina</td>
<td>2015-05-04</td>
<td>0/3</td>
<td>1</td>
<td>2020-2021 EHRA Performance Evaluation Test 3</td>
</tr>
</tbody>
</table>

**Revise Employee Appraisal**

If you need to update or correct information in your employee’s annual appraisal, but it has already been approved by the Next-Level Supervisor, email [nt-stakes@uncc.edu](mailto:nt-stakes@uncc.edu) or contact Heather Benson, EHRA Staff Employment Coordinator, at 704-687-7863 or Paulette Russell, HR Consultant, at 704-687-0660 to request that the action be put back in your queue for revision. You will see the ‘**Supervisor Appraisal**’ appear back in your ‘Action Items’ when you enter the employee portal.

Once, it has been put back in your queue use the ‘**Supervisor Appraisal**’ process steps to revise and complete the employee appraisal.
Once you finish revising the appraisal and click complete, the appraisal will go back to the employee to ‘Acknowledge’ the changes.

**SHRA Performance Management**

The *UNC Charlotte Employee Portal* is used to: 1) **Create** a SHRA Performance Plan; 2) **Modify** an existing SHRA Performance Plan; 3) **Document** Performance Feedback (Off-Cycle Reviews or Progress Notes); and to 4) **Complete** a SHRA Appraisal.

**SHRA Performance Plan Process Steps**

Create SHRA Performance Plan

*Video available*

To create a SHRA Performance Plan, log into NinerTalent ([http://jobs.uncc.edu/hr](http://jobs.uncc.edu/hr)) using your Ninernet credentials:
Once logged in, click the ‘…’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.

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.

‘Item’ indicates the review type (Annual, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To create a new, and/or modify an existing, performance plan, select the item for the desired employee with the description ‘Performance Plan Creation’.
Note! Prior to the beginning of the new performance cycle, and you drafting the new performance plan, you should sit down with your employee to discuss the department or unit’s strategic goals for the cycle. You and your employee may be able to collaborate on what individual goals and career development goals should be included in the plan.

Once selected, the Performance Plan will appear. You will see the following on this page:

- Instructions in blue that will give you general information about the action you are about to perform
- Four (4) tab sections that make up the Supervisor Evaluation
- Helpful links & instructions to help you complete this performance evaluation

**Institutional Goals**
The first tab section is titled ‘Institutional Goals’. This tab is where you will enter a weight for each corresponding institutional goals and any specific standards of performance if desired. You will need to provide a percentage weight (excluding the % sign) of no less than 5 for each goal, and all 5 goals (6 goals if supervisor) must add up to 50.

If you’re employee is not a supervisor – be sure to input ‘0’ as the weight for the Supervision goal.

Individual Goals

The second tab section is titled ‘Individual Goals’. This is where you will enter three to five individual goals and their corresponding percentage weights (excluding the % sign). You will need to provide a weight of no less than 5 for each goal, and all the individual goals must add up to 50.

Unlike the institutional goals, individual goals are NOT intended to cover all aspects of an employees work product – these are big ticket items to be completed in this performance cycle.
You may add new individual goals, remove existing goals, or edit/replace existing goals, as necessary and/or appropriate. Please label each goal that is added. The ‘Add Entry’ button should be selected to open a new entry field.

**Career Development Goals**

The third tab is the Career Development Plan. On this tab, you will enter/edit any Career Development Activities associated with the specific employee and identify any additional Compliance & Integrity Goal Activities that you expect your employee to complete along with the identified required activities.

Career Development activities may include such items as: training workshops, technical skills training, job shadowing, professional certifications and/or conferences, etc. Please number each activity that is added.

**Career Development Activities**

Each employee should have at least one career development goal or activity each performance cycle. (Note: Career Development activities are strongly encouraged as a ‘best practice’ and should be updated on an annual basis.)
Compliance & Integrity Goal Activities

The Compliance & Integrity Goal Activities are annual activities or trainings that may require completion to meet the expectations of the Institutional Goal - Compliance & Integrity. Some trainings and activities are required for all employees University-wide, no matter the department. Other activities are strongly encouraged by the University, but supervisors/department heads are given the discretion to determine if they will assign them as a requirement to meet during the performance cycle. (Required activities, must be completed in order to “Meet Expectations”)

- Diversity, Equity and Inclusion Learning Plan – strongly encourages all employees to complete an online workshop handpicked by the Office of Diversity and Inclusion and encourages additional activities
- Environmental Health & Safety Compliance Plan – requires supervisors to communicate and employees to complete any identified safety trainings that pertain to their position. These types of trainings are not new and are specified by the EHS Training by Work Environment and tracked by the Office of Environmental Health & Safety.
• IT Security & Compliance Plan – provides recommended resources and online Security Awareness Training to help employee safeguard University information resources. Supervisors should determine what resources, provided by the OneIT Information Security Education webpage, should be required to be reviewed by their employees based on their positions. (Any required activities should be documented)

Any required Compliance & Integrity Goal Activities SHOULD NOT count toward the one career development activity mentioned above. However, any additional/recommended activities may be used toward the career development activity.

An entry box is provided for the supervisor to assign any training or activities not listed as required in the plan document information. (For example, as the DEI Training and IT & Security Plan activities are not required, any activities required by the supervisor should be included in this box.

![Compliance & Integrity Goal Activities]

Note: In order for the employee to “Meet Expectations” on the Compliance & Integrity goal, the employee must complete the required activities.

Evaluation Methods

The fourth tab section is Evaluation Methods. On this tab, you will choose the Evaluation Method(s) you intend to use to conduct your assessment of the employee’s performance. You may choose as many evaluation methods as deemed appropriate, or necessary. (Note: If you choose ‘Employee Self-Report’, please communicate to your employee what this expectation entails, including the schedule (weekly, monthly, quarterly, etc.) of these reports or check-ins and the expected content.)
Plan

The supervisor and employee create the performance plan together, setting goals for the coming year.

Evaluation Method(s)

The boxes below indicate the types of evaluation method(s) you will utilize to appraise the employee’s performance. Select all that apply.

- Supervisor Observation
- Employee Self-Report
- Spot Checks
- Project Results
- Work Samples/Statistics
- Peer Feedback
- Third Party Feedback
- Remove Entry?

Note: If you still need to finalize some elements in the document prior to sending it to the Next-Level Supervisor for review, choose ‘Save Draft’.

If you choose ‘Complete’ it will go to the Next-Level Supervisor for review. At this point, the Next-level supervisor may return the plan back to you for revising or approve it so you can move forward with the performance plan meeting and employee acknowledgement of the performance plan process.

If you fail to complete any of the required sections in the plan you will get the following message the plan will remain in draft mode. The message will give a general indication as to why the process was unable to be completed. Correct these errors and click the ‘Complete’ button again to finish this task.
If your plan goes through successfully, you will see the following message at the top of your screen. And, the completed plan document will be available for you to print and/or copy via the ‘Actions’ button.

You can copy the completed performance plan to your other employees, who are in like positions, by clicking the ‘Actions’ button. This will begin the copying process.

If you would like to copy a performance plan to like positions go to the next section of this guide titled ‘Copy Performance Plan to Other Like Positions’. If you have already clicked the copy button as depicted below, you should start from this point in the directions below.
If you have like positions that will have the same or similar performance plans, you can use these instructions to copy an already completed performance plan (which you created for one employee) to your other direct reports.

To copy a SHRA Performance Plan, log into NinerTalent (http://jobs.uncc.edu/hr) using your Ninernet credentials:

Once logged in, click the ‘...’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.
Find the Template Plan

When you reach the *UNC Charlotte Employee Portal*, the first screen you will see is ‘Your Action Items’. Once here, click ‘My Employee Reviews’ on the left navigation or via the ‘Performance’ dropdown to take you to the ‘Reviews Dashboard’.

The ‘Reviews Dashboard’ will appear for you to locate the specific employee and associated program from which you want to copy the Performance Plan. Click the employee’s name to access their performance plan.
You can view any completed or open item from the ‘Overview’ screen at any time. In this case, to begin copying this particular employee’s Performance Plan, click on the ‘Plan’ link on the left navigation.

**Begin the Plan Copy Process**

The Plan for the employee will open. Click the ‘Actions’ button and choose ‘Copy’ to begin copying the Plan.
The following screen will appear. Select the performance components you want to be copy (to include Individual Goals, Career Development Activities, and Evaluation Methods or any of the institutional goals listed) then click the ‘Continue’ button.

**Note!** The items indicated with the red arrows are merely instructions or descriptions within the document and will not change whether selected or not.
When you arrive at the ‘Select Employees’ tab, select the employees under your supervision whom you want this Performance Plan to copy to by putting a check mark in the box next to their name.

It is **not recommended** that you select/check the box that reads ‘Copy Plan to selected employees and complete the associated Step...’

If this is selected, the plan will go directly to the Next-Level Supervisor for approval. You should review the copied performance plans prior to this to ensure all elements in the plan have copied over correctly.

Click the ‘Copy Objective Plan’ button to proceed.

The performance plan has now been successfully copied to the employees you selected. Click the employee’s name to review the plan and make any necessary edits, and finalize.
Finalize the Plan Action

You can also find the plans you copied in your Actions Items box. Get there by clicking the ‘Home’ button at the top of your screen. All copied items will still have the following description - ‘Performance Plan Creation’ until you go into the plan and click the ‘Complete’ button on the final tab of the plan document.

When you are satisfied with the plan click the ‘Complete’ button on the ‘Evaluation Methods’ tab. This will send the plan to the Next-Level Supervisor for review.

Plan

The supervisor and employee create the performance plan together, setting goals for the coming year.

Evaluation Method(s)

The boxes below indicate the types of evaluation method(s) you will utilize to appraise the employee's performance. Select all that apply.

- Supervisor Observation
- Employee Self-Report
- Spot Checks
- Project Results
- Work Samples/Statistics
- Peer Feedback
- Third Party Feedback
- Remove Entry?
Next-Level Supervisor Approves Performance Plan

*(Video available)*

Once the Supervisor has completed the Performance Plan, this information will route immediately to the Next-Level Supervisor for consideration/comments.

To review and approve an SHRA Performance Plan, log into NinerTalent (http://jobs.uncc.edu/hr) using your NinerNet credentials:

![NinerTalent login page](image)

Once logged in, click the ‘…’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.

![UNC Charlotte Employee Portal](image)
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.

‘Item’ indicates the review type (Annual, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To review the Performance Plan drafted by the supervisor, select the item for the desired employee with the description ‘**Next Level Supervisor Approves Performance Plan**’.

Review the Performance Plan for accuracy and consistency. **(Note: The Next-Level Supervisor should ensure that there is consistency in goals across similar positions and that the individual goals directly or indirectly relate to the unit’s strategic goals in the current cycle.)**

### Plan

Please review the employee’s Performance Plan for accuracy and to ensure the weights for all goals are calculated correctly and are consistent with similar positions across the unit. If there are revisions needed, enter comments and select “Return”. If the plan is correct, select “Approve” to forward the plan to the employee for acknowledgment.

When you get to the bottom of the page you can choose to **Approve** the Plan or **Return** it to the supervisor for revision. If it is necessary to return the Performance Plan back to the supervisor, you must enter your instructions into the comments box at the bottom of the form prior to returning it.
If you attempt to ‘Return’ the action without writing a comment in the box, you will see the following at the top of the screen:

Comment can’t be blank

Once the Return action is completed correctly, you will see the following at the top of the screen. It is now back in the supervisor’s queue to make the necessary corrections.

The Document has been sent back for revision

Once you have received a Performance Plan that you agree with you will ‘Approve’ the action.

**Note:** Once you click the ‘Approve’ button, the Performance Plan will be sent to the employee for review and acknowledgement. An email is not sent to the supervisor notifying them that you have approved the action.

Accessing Next Level Approval Comments

Supervisors can access the Next Level Approvers comments on the plan, if any, by going to the ‘My Employees’ Reviews’ screen. Select the desired employee for a particular program to access the ‘Overview’ screen then select ‘Approvals & Acknowledgements’ link on the left navigation pane. ([See Searching the Dashboard](#)).

To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Employee Acknowledges SHRA Performance Plan

(Video available)

Once the Next Level Supervisor Approves the performance plan it will go the employee for acknowledgement. It is expected that supervisors will go over this plan with their employee, before the employee acknowledges it in NinerTalent.

**Acknowledge or Dispute**

Choosing ‘Acknowledge’ or ‘Dispute’ brings the Performance plan review process to successful completion. The plan may only be revised if the HR Administrator in charge of this process reopens it.

**Note:** Emails are not sent to the supervisor to notify them that the employee has acknowledged or disputed the plan. You will only be aware of this if the employee notifies you themselves, or if you look at the performance dashboard like the one below.

You can identify which employees have acknowledged or disputed their plans by looking at the ‘My Employees’ Reviews’ Dashboard. (See Searching the Dashboard).

![Performance Plan Dashboard](image)

**Revise Performance Plan**

If you need to update or correct information in your employee’s Performance Plan, but it has already been approved by the Next-Level Supervisor, email nt-stakes@uncc.edu or Ext. 70660 (or the Employee Relations Office at Ext. 70662) to request that the action be put back in your queue for revision. You will see the ‘Performance Plan Creation’ appear back in your ‘Action Items’ when you enter the employee portal.

Once, it has been put back in your queue use the ‘Create SHRA Performance Plan’ process steps to revise and complete the performance plan.

Once you finish revising the plan, your changes will go back to the Next-Level Supervisor for approval, then back to you to meet with your employee about the changes made, and last to the employee to ‘Acknowledge’ the changes.
SHRA Off-Cycle Reviews

(Video available)

Off cycle reviews are any performance reviews that specifically tell an employee how they would be rated at a specific time in the cycle that it is not the annual performance appraisal. Off-cycle reviews include probationary, interim, transfer, employee-requested, management-driven, and other summary performance appraisals that are used to help keep the employee on track with meeting their goals and clearly state their current rating.

For probationary employees, probationary reviews (or off-cycle reviews) are required quarterly (April, July, October, and January). These reviews should follow the timeline of the Talent Conversations in the NinerTalent STAKES Cycle.

For permanent employees, off-cycle reviews should occur three (3) times a year (July, October, January). This includes:

- Quarterly check-in for July
- Interim review in October (required if employee received a disciplinary action in the current cycle or had any rating of ‘not meeting expectations’ in the last performance cycle)
- Quarterly check-in for January
To add an Off-Cycle Review, log into NinerTalent (http://jobs.uncc.edu/hr).
Once logged in, click the ‘…’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.

The steps to initiate an off-cycle review depend on if it is the employee’s first off-cycle review in this performance cycle. Follow the instructions that fit your scenario:
1. Employee’s first off-cycle review in the current performance cycle
2. Employee’s second or subsequent off-cycle review in the current performance cycle

Scenario 1. Employee’s First Off-Cycle Review in Current Performance Cycle

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.

To create the first off-cycle review for the performance cycle, select the item for the desired employee with the description ‘**Off-Cycle Review**’.

![Image of the Employee Portal](image)

Welcome to the Employee Portal, Cynthia Edwards

Your Action Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-2019 Off-Cycle Reviews for Katherine Tomey</td>
<td>Off Cycle Review</td>
<td>n/a</td>
<td>Available</td>
</tr>
<tr>
<td>2018-2019 Off-Cycle Reviews for Tawander Barr</td>
<td>Off Cycle Review</td>
<td>n/a</td>
<td>Available</td>
</tr>
<tr>
<td>2018-2019 SHRA STAKES Review for Katherine Tomey</td>
<td>Performance Plan Creation</td>
<td>2018-05-14 Due 2 months ago</td>
<td>Overdue</td>
</tr>
<tr>
<td>2018-2019 SHRA STAKES Review for Tawander Barr</td>
<td>Performance Plan Creation</td>
<td>2018-05-14 Due 2 months ago</td>
<td>Overdue</td>
</tr>
</tbody>
</table>

Note the Off-Cycle Review has no due date; however, you should be aware of the timeline for any off-cycle review (or Talent Conversation) that applies to your employee and enter it into this program accordingly. The NinerTalent STAKES timeline or cycle can be found at the beginning of this section.
Once the Off-Cycle Review is selected, the following screen will appear. Here you will enter the following information.

When you complete your first off-cycle review in the current performance cycle you will click the ‘Complete’ button. At this time the review will go to your employee for Acknowledgement. Once the employee has acknowledged the review, it will be available for you to go back in to the same program and add another review when appropriate. Instructions on how to add the second or subsequent off-cycle review may be found in the instructions on the next page.
Scenario 2. Employee’s Second or Subsequent Off-Cycle Review in Current Performance Cycle

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.

The second and subsequent times you enter an off-cycle review for your employee, you will have to search for the off-cycle review by clicking on to the ‘My Employees’ Reviews’ link at the top left of your screen. Past and current performance review cycles documented in the NinerTalent system can be found here.

When the screen below appears, it will automatically show you the current performance cycle programs which include the SHRA STAKES Review and Off Cycle Review for each of your employees which are currently open. You can also use the search bar or the Program filter to find the desired program.

Select the employee for whom you wish to create an off-cycle review by clicking their name.
When the following screen appears choose the ‘Plan’ link in the left navigation pane or click Step 1, the ‘Off Cycle Review’ link, to open the off-cycle review.

Once the Off-Cycle Review is selected, the following screen will appear. You will see the previous off-cycle review(s) you entered this cycle. In order to add your new or most recent off-cycle review you should click the blue ‘Actions’ button and select ‘Revise’.

**Plan for Katherine Tomey**

**Appraisal Criteria**

**Date**
2017-10-31

**Review Type**
Probationary

**Rating**
Not Meeting Expectations

**Comments**
Employee needs to improve his skills in the areas of Expertise and Customer-Orientatio. He is often not attentive to the needs of the customer and after being in his position for 6 months is still not knowledgeable of general office policies/procedures or where to locate them. Also, he is not familiar enough with the units within Human Resources to correctly direct customers.

By the next quarter review the employee needs to become familiar with the the policies, procedures, and processes of the department. In order to assist in gaining this...
After ‘Revise’ is selected, the following ‘Add Entry’ option will appear beneath the last off-cycle entry that was made. Click the ‘Add Entry’ button to open up a new entry field and begin drafting your next off-cycle review.

When you are finished entering your new off-cycle review click ‘Revise’ at the bottom of the page to complete the action and send it to your employee for acknowledgement.
SHRA Annual Review Process Steps

*Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your self-appraisal

**Supervisor Appraisal**

*(Video available)*

To, log into NinerTalent ([http://jobs.uncc.edu/hr](http://jobs.uncc.edu/hr)).
Once logged in, click the ‘…’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.

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.

Remember! Before you go to complete your ‘Supervisor Appraisal’, you should review the ‘Employee Self-Evaluation’ to see how the employee feels they performed during the cycle and what future job priorities and career goals they have for the new cycle. If you need instructions on how to find this document go to the Searching & Dashboard section under [Example: Review Employee Self-Appraisal](#).

‘Item’ indicates the review type (Annual, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To create an employee appraisal or evaluation, select the item for the desired employee with the description ‘Supervisor Appraisal’.
Welcome to the Employee Portal, Cynthia Edwards

Your Action Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-2019 Off-Cycle Reviews for Katherine Tomey</td>
<td>Off Cycle Review</td>
<td>n/a</td>
</tr>
<tr>
<td>2018-2019 Off-Cycle Reviews for Tawander Barr</td>
<td>Off Cycle Review</td>
<td>n/a</td>
</tr>
<tr>
<td>2018-2019 SHRA STAKES Review for Katherine Tomey</td>
<td>Supervisor Appraisal</td>
<td>2018-05-14 Due 2 months ago</td>
</tr>
<tr>
<td>2018-2019 SHRA STAKES Review for Tawander Barr</td>
<td>Supervisor Appraisal</td>
<td>2018-05-14 Due 2 months ago</td>
</tr>
</tbody>
</table>
Once selected, the Supervisor Evaluation will appear. There are **five (5) tab sections** across the top of the Supervisor Evaluation.

The **first and second tab** sections are the Institutional Goals and Individual Goals. On these tab, you will enter a ‘Rating’ and ‘Supervisor Comments’ regarding how your employee met the expectations set in their performance plan.

**Please Note!** Some ratings require comments. See the chart below to understand what is required of you.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Required Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeding Expectations</td>
<td>Comments describing the employees work this cycle, which support a rating of exceeding expectations as it is described in the institutional goals guidelines or in your individual goals description.</td>
</tr>
<tr>
<td>Meeting Expectations</td>
<td>“n/a” (comments not required, but field requires an entry)</td>
</tr>
<tr>
<td>Not Meeting Expectations</td>
<td>Comments describing the performance that led to this rating and a Performance Improvement Plan (PIP). The PIP should include any actions that must be taken for the employee to meet the performance expectation and/or to assist in getting them to those performance expectations (i.e. any retraining, performance actions &amp; deadlines) and a timeframe in which this performance issue be resolved.</td>
</tr>
</tbody>
</table>

Screenshots of the Institutional and Individual Goal tabs start on the next page.
Rating Your Plan Goals

Institutional Goals

The institutional goals in the performance plan define campus-wide performance expectations for all SHRA employees.

Click HERE to open the Institutional Goals Document.

Enter a rating and comments if required/desired for each institutional goal.

- If “Meeting Expectations” comments are not required and you may enter an “n/a” in the box if you do not desire to comment.
- If “Not Meeting Expectations” you must enter the reason for the rating and any guidelines or expectations for the employee’s improvement in this area.
- If “Exceeding Expectations” you must enter specific example(s) that demonstrate the employee’s consistent performance that exceeds the “meeting expectations” standard and was achieved with minimal oversight.

Note: Comments are required for each goal rating of “Not Meeting Expectations” or “Exceeding Expectations.” Review the Institutional Goals Document linked above to determine what rating should be assigned to your employee given their performance this cycle.

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.
- Innovation: Continuously looks for ways to improve efficiency or quality.
- Development: Maintains technical skills and relevant professional credentials.

Weight:

10

Comments and/or Performance Improvement Plans:

* Rating

Please select

* Comments and/or Performance Improvement Plans
Note: A Performance Improvement Plan must include the following information: 1) Performance issue(s); 2) the Performance Expectation(s); and 3) Timetable(s) for improvement.

When you reach the bottom of each page and have completed comments for each goal, you may click ‘Save Draft’ or ‘Next’. Choosing the ‘Save Draft’ button will allow you to come back and complete the evaluation at a later point in time. Choosing the ‘Next’ button will move you forward to the next tab section. Note: Choosing the ‘Next’ button will enable auto save for the work just completed.

Commenting on Career Development Goals

The next tab section indicates Career Development Goals. On this tab, you will enter Supervisor Comments, as appropriate or necessary.

Career Development Goals

Goal(s):

1. Career Development Goal
2. Career Development Goal
3. Career Development Goal

Overall Performance Comments and Scoring

The next tab section indicates ‘Overall Performance’. On this tab, you will provide comments regarding the employee’s overall performance during the cycle. PLEASE READ ALL OF THE INSTRUCTIONS ON THIS PAGE! It is important that the scoring be consistent with policy.
Note: All fields must be completed by the supervisor regardless of the overall rating. This process step may not be marked as ‘Complete’ without this required information.

Scoring
The scoring is done automatically and takes any scores of “Not Meeting Expectations” into account, ensuring that no one with an individual score of “Not Meeting Expectations” can receive an overall score of “Exceeding Expectations”.

However, the program can not take disciplinary action into account. It is for this reason we have the last to questions on the appraisal.

- Was a formal disciplinary action initiated for this employee this cycle (April 1, yyyy – March 31, yyyy)?
  - Select “Yes” if and 18-month written warning was approved by the Human Resources office and put into your employee’s file.
• Does your employee’s ‘Score in Progress’ reflect that he/she is “Exceeding Expectations” even though you answered “Yes” to the question above?
  o If you answered “No” to the first question, answer “No” for the second.
  o If you answered “Yes” to the first question, make sure your employee’s running score at the top of the page is not “Exceeding Expectations”. If it does, mark “Yes” and call HR Employee Relations.
    ▪ This means that you did not mark at least one rating at the “Not Meeting Expectations” level even though your employee has an active disciplinary action on file. Your scoring will have to be updated to cite the performance deficiency that resulted in a formal disciplinary action.

When you select the ‘Complete' button, the following warning screen will appear. Please ensure all necessary information has been entered/completed prior to clicking ‘OK’.

To get back to NinerTalent, click ‘Go to UNC Charlotte User Site’ in the top right hand corner:
Next-Level Supervisor Approves Appraisal

(Video available)

Annual Review Process Steps

Once the Supervisor has completed the Supervisor Appraisal, this information will route immediately to the Next-Level Supervisor for consideration/comments.

To approve a SHRA Supervisor Review, log into NinerTalent ([http://jobs.uncc.edu/hr](http://jobs.uncc.edu/hr)) using your NinerNet credentials:
Once logged in, click the ‘...’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.

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.

‘Item’ indicates the review type (Annual, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To review the Supervisor Evaluation, select the item for the desired employee with the description ‘Next Level Supervisor Approves Appraisal’.
Remember! You should be reviewing the appraisals to make sure your supervisors have done the following:

- Complied with SHRA Performance Appraisal Guidelines by:
  - ensuring no employee with a disciplinary action in the current cycle or any rating of “Not Meeting Expectations” in the current appraisal has an Overall Rating of “Exceeding Expectations”
  - inputting specific performance examples and performance improvement plan if necessary in the comments box if the employee was rated as “Exceeding Expectations” or “Not Meeting Expectations”
- Rated the employees in their unit consistently if the performance and/or conduct appraised was essentially the same or similar

Once your review has been completed, you may either approve or return the appraisal. Choosing the ‘Approve’ action indicates your concurrence with the Ratings and Comments, as well as, your assurance that all required information is completed and included. Choosing the ‘Return’ option indicates modifications to, and/or additional information for, the Supervisor Appraisal are required and the action is returned to the Supervisor’s queue.

**Note:** The Next-Level Supervisor should ensure that all required information, including comments for Exceeding Expectations and/or Performance Improvement Plan information is completed prior to marking the Supervisor Appraisal as ‘Approved’. If items are missing, please say what actions need to be completed in the comments box and choose the ‘Return’ action.

If you do not enter comments in the box prior to clicking ‘Return’, you will see the following:

Once the Return action is completed correctly, you will be brought to the following action screen and it will read - “The Document has been sent back for revision.” It is now back in the supervisor’s queue to make the necessary corrections.
**Accessing Next Level Approval Comments**

Supervisors can access the Next Level Approvers comments on the appraisal, if any, by going to the 'My Employees' Reviews' screen. Select the desired employee for a particular program to access the 'Overview' screen then select ‘Approvals & Acknowledgements’ link on the left navigation pane. (See Searching the Dashboard).

To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Supervisor Release Appraisal to Employee

After clicking ‘Complete’ on the ‘Supervisor Appraisal’ task, the appraisal will go back to your ‘Action Items’ or ‘Home’ screen with the description ‘Release Appraisal to Employee’. This will allow you to get any necessary approvals from your supervisor or department leaders and schedule to meet with your employee.

To release the action, click on the link for the appropriate action item. When the item opens you will see the appraisal document. From here click the blue ‘Actions’ button and select ‘Approve’.

If you need to print or save the document as a PDF, prior to sending it to your employee, you can do it from here as well.

Click the blue ‘Actions’ button and select ‘Print’.
If you would like to save the document as a PDF, when the Print screen appears, click the ‘Destination’ dropdown and select ‘Adobe PDF’ or ‘Save as PDF’. You can then send the document to leadership to review if it is required.

To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Employee Acknowledges SHRA Performance Appraisal

Once the supervisor releases the performance appraisal, it will go to the employee for acknowledgement. It is expected that supervisors will review the appraisal with the employee before it is acknowledged in NinerTalent.

**Acknowledge or Dispute**

Choosing ‘Acknowledge’ or ‘Dispute’ brings the Performance appraisal process to successful completion. The appraisal may only be revised if the HR Administrator in charge of this process reopens it.

**Note**: Emails are not sent to the supervisor to notify them that the employee has acknowledged or disputed the appraisal. You will only be aware of this if the employee notifies you themselves, or if you look at the performance dashboard like the one below.

You can identify which employees have acknowledged or disputed their appraisals by looking at the ‘My Employees’ Reviews’ Dashboard. Click on the employee’s name and then the ‘Approvals & Acknowledgements’ link on the navigation pane to access the comments. See Searching the Dashboard for more information on how to navigate NinerTalent.

**Revise Employee Appraisal**

If you need to update or correct information in your employee’s annual appraisal, but it has already been approved by the Next-Level Supervisor, email nt-stakes@uncc.edu or contact Heather Benson, EHRA Staff Employment Coordinator, at 704-687-7863 Paulette Russell, HR Consultant, at 704-687-0660 to request that the action be put back in your queue for revision. You will see the ‘Supervisor Appraisal’ appear back in your ‘Action Items’ when you enter the employee portal.
Once, it has been put back in your queue use the ‘Supervisor Appraisal’ process steps to revise and complete the employee appraisal.

Once you finish revising the appraisal, your changes will go back to the Next-Level Supervisor for approval, then back to you to meet with your employee about the changes made, and last to the employee to “Acknowledge” the changes.