

UNC Charlotte
STAKES PERFORMANCE

NinerTalent Performance Module - Supervisor Guide



Human Resources

UNC Charlotte



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Navigating NinerTalent Performance Module

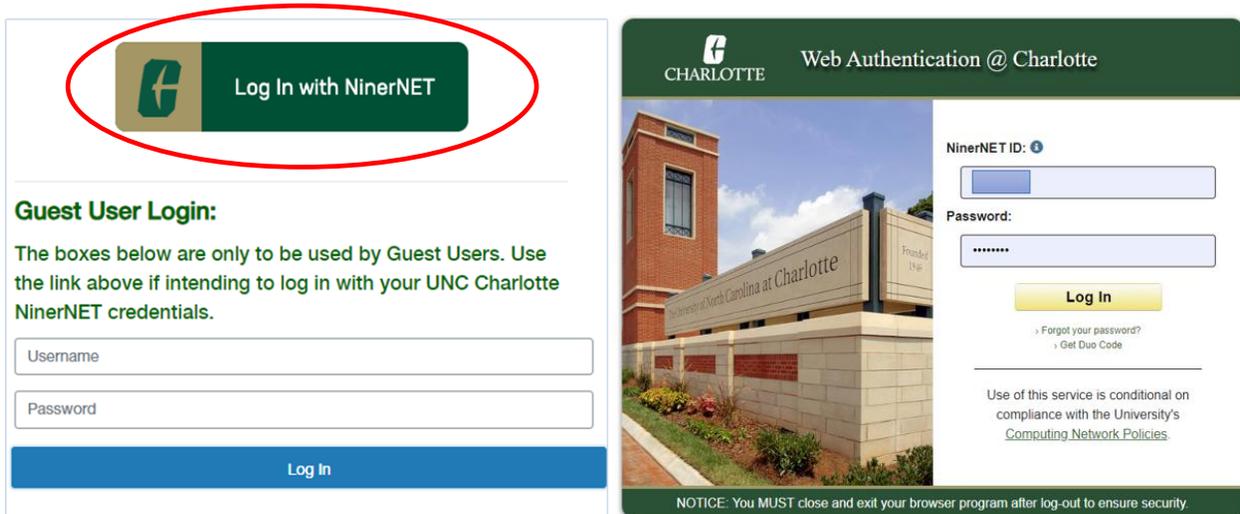
(video available)

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.

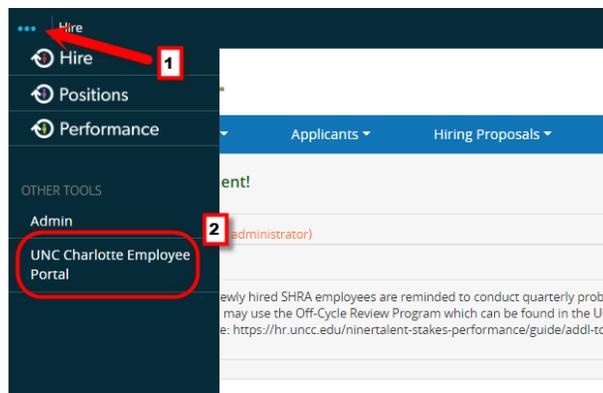
The **UNC Charlotte Employee Portal** in NinerTalent is specifically used to maintain yearly performance plan and appraisal information. It can be used to find both current and past performance actions including performance plans, evaluations, approvals & acknowledgments, progress notes, etc.

Logging in and Accessing the Employee Portal

Log into NinerTalent (<http://jobs.charlotte.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.

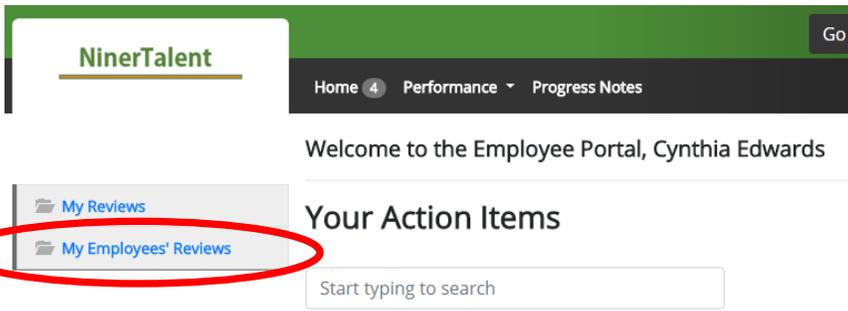
If you need to get back to **'Your Action Items'** page click the **'Home'** button at the top of your screen.

The screenshot shows the NinerTalent Employee Portal interface. At the top, there is a navigation bar with the NinerTalent logo on the left, a search bar, and buttons for 'Go to UNC Charlotte User Site' and 'PeopleAdmin'. Below the navigation bar, there is a secondary navigation bar with 'Home' (circled in red), 'Performance', and 'Progress Notes'. On the right side of this bar, it says 'Hello, Cynthia' and 'Log Out'. Below the navigation bar, there is a welcome message: 'Welcome to the Employee Portal, Cynthia Edwards'. On the left side, there is a sidebar with 'My Reviews' and 'My Employees' Reviews'. The main content area is titled 'Your Action Items' and contains a search bar with the placeholder text 'Start typing to search'. Below the search bar is a table with the following data:

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

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.

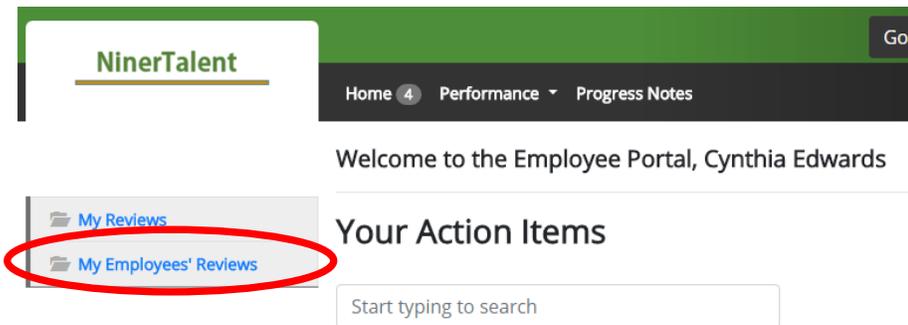
To find action you have already completed, click **'My Employees' Reviews'** to access the 'Review Dashboard'.



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@charlotte.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 screenshot shows the NinerTalent Performance Module dashboard. At the top, there is a navigation bar with the NinerTalent logo, a 'Go to UNC Charlotte User Site' button, and a 'PeopleAdmin' button. Below this is a breadcrumb trail: 'Home 2 Performance'. A user greeting 'Hello, Charlotte' and a 'Log Out' button are also present.

The main content area is titled 'Reviews Dashboard'. It features a filter bar with the following options: 'Reset', 'Program' (set to 'None'), 'Employee Name' (with a search icon), 'Group by:' (set to 'Program'), and an 'Advanced' button. A red arrow points to the filter bar with the label 'Filter options'.

Below the filter bar are 'Status Tabs' for 'All Reviews' (6), 'Not Started' (0), 'In Process' (3), 'Complete' (0), 'Overdue' (0), and 'Disputed' (0). A green arrow points to these tabs with the label 'Status Tabs'.

The dashboard displays two review sections. The first is '2017-2018 Off-Cycle Reviews' (3), with a table showing reviews for College (Charlotte), Dust (Goldie), and Niner (Norm). The second is '2017-2018 SHRA STAKES Review' (3), with a table showing reviews for College (Charlotte), Dust (Goldie), and Niner (Norm). A tooltip 'Next Level Supervisor Approves Dean Manager' is visible over the progress indicators in the SHRA STAKES Review table. Red arrows point to the 'Current Program' header of each section with the label 'Current Program'.

At the bottom, a 'Process Key' is provided with a magnifying glass icon and four categories: 'Task Not Started / Unavailable' (grey), 'Task Completed' (green), 'Task Open' (orange), and 'Task Disputed' (red). A red arrow points to the magnifying glass icon with the label 'Process Key'.

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.



Reviews Dashboard

Reset Program 2017-2018 SHRA STAKES Employee Name Group by: Program

Reporting Org Unit: None

All Reviews 6 Not Started 0 In Process 3 Complete 0 Overdue 0 Disputed 0

2017-2018 SHRA STAKES Review 3

College	Employee	Date	Progress	Rating	Program
Charlotte	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	Norm	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.



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Updated 10.09.2023

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)

The screenshot displays the NinerTalent Performance Module interface. At the top, there is a navigation bar with 'Home' and 'Performance' menus, and a user profile for 'Charlotte' with a 'Log Out' button. The main content area is divided into a left sidebar, a central task list, and a right sidebar.

Left Sidebar: Contains navigation links for 'Overview', 'Plan', 'Supervisor Evaluation', 'Self Evaluation', 'Approvals & Acknowledgements', 'Progress Notes', and 'History'. A blue box highlights the 'History' link, with a red arrow pointing to a 'Program Information' tooltip.

Central Task List: A table with columns: Task, Task Owner, Date Opened, Date Completed, and Due Date. The tasks are numbered 1 through 8. Tasks 1, 2, 3, and 4 are highlighted with green boxes, indicating they are completed. Tasks 5, 6, 7, and 8 are in grey boxes, indicating they are not started.

Right Sidebar: Displays '2017-2018 SHRA STAKES Review' with a 'Review Status: Open' indicator. It also shows 'Evaluation Type: Focal', 'Program Timeframe: 04/01/17 to 03/31/18', 'Last Updated: November 06, 2017 15:42', and 'Last Completed Step: Employee Acknowledges Performance Plan'.

Annotations: A red arrow points from the 'Position Description' link in the top left to the 'Position Description' text in the task list. Another red arrow points from the 'History' link in the sidebar to the 'Program Information' tooltip.

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 Employee Acknowledges Appraisal	Norm Niner			2018-05-15



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 divided into two columns. The left column contains a sidebar with a menu: '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'. The right column is titled 'Task' and lists eight steps: 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, and 8. Employee Acknowledges Appraisal. A red arrow points to the 'Position Description' link in the left sidebar, and another red arrow points to the 'Self Evaluation' menu item.



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 NinerTalent (<http://jobs.charlotte.edu/hr>).

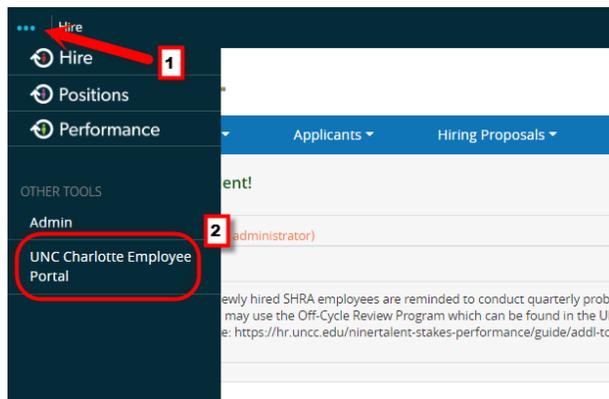
A screenshot of the NinerTalent login page. At the top, there is a green button with a white 'G' icon and the text 'Log In with NinerNET'. This button is circled in red. Below it, there is a section titled 'Guest User Login:' with instructions: 'The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNET credentials.' There are two input fields: 'Username' and 'Password'. At the bottom of this section is a blue 'Log In' button.A screenshot of the UNC Charlotte Web Authentication page. The header is green with the UNC Charlotte logo and the text 'Web Authentication @ Charlotte'. Below the header is a large image of a UNC Charlotte building. To the right of the image is a login form with fields for 'NinerNET ID:' and 'Password:'. Below these fields is a yellow 'Log In' button. There are links for 'Forgot your password?' and 'Get Duo Code'. At the bottom of the page, there is a green banner with the text: 'NOTICE: You MUST close and exit your browser program after log-out to ensure security.'

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

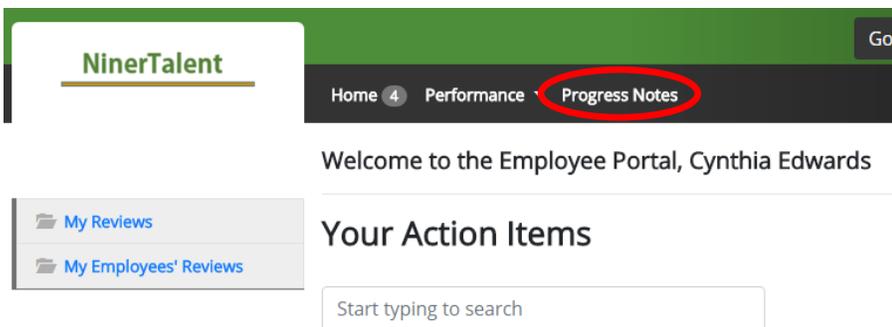


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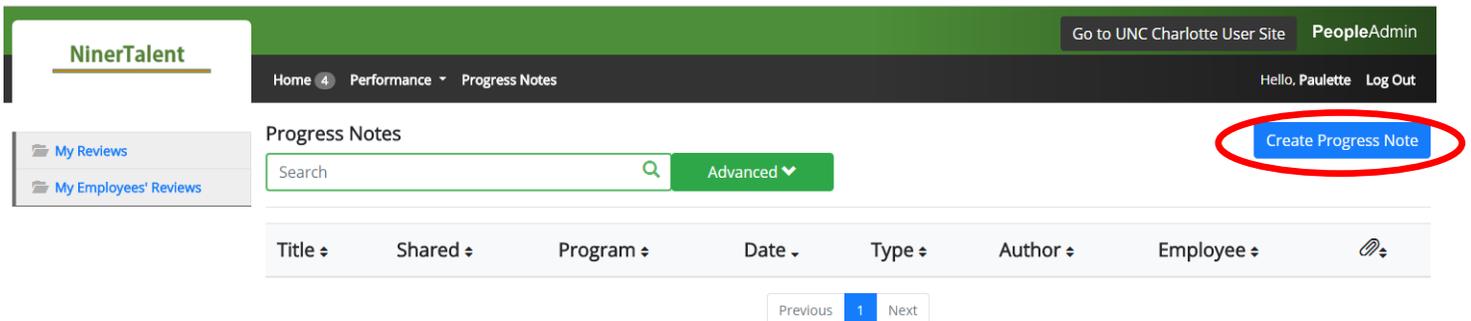
Updated 10.09.2023



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'**.



Choose Employee

Progress Note

Descriptive Title (to help locating information easy)

Relevant Comments regarding performance

Click Share button to share with employee

Click to add attachment

EHRA Performance Management

The **UNC Charlotte Employee Portal** is used to: 1) **Complete** an EHRA Performance Plan; 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.charlotte.edu/hr>).

Log In with NinerNET

Guest User Login:
The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNET credentials.

Username
Password

Log In

CHARLOTTE Web Authentication @ Charlotte

NinerNET ID:

Password:

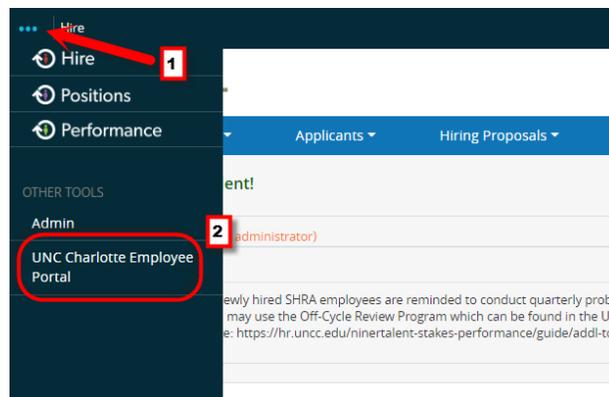
Log In

[Forgot your password?](#)
[Get Duo Code](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security.

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**'.

Home 19 Performance ▾ Progress Notes

Welcome to the Employee Portal, Gary Stinnett

Your Action Items

Item	Description
2018-2019 EHRA Performance Evaluation for Alyson Ebaugh	Supervisor Appraisal
2018-2019 EHRA Performance Evaluation for Jeanne Madorin	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



Supervisor Evaluation for Jeanne Madorin (Score in progress: Unrated)

Actions ▾

Assess how well your employee met the goals established this cycle by rating each goal and providing feedback regarding the performance which resulted in the rating.

The rating scale is from "1 - Not Meeting Expectations" to "7 - Exceeding Expectations."

- 1 and 2 = Not Meeting Expectations
- 3, 4, and 5 = Meeting Expectations
- 6 and 7 = Exceeding Expectations

Once you have completed the appraisal, it will go to the employee for acknowledgment.

Institutional Goals **Goals & Objectives** Professional Development Activities Overall Performance

Attachments 0

Check spelling

****Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES TO ASSIST YOU WITH NAVIGATING NINERTALENT AND COMPLETING THIS EHRA NF PROCESS ACTION****

You can view the employee's position description by clicking the job title under their name at the left of the screen.

Rate your employee's overall job performance based on the Institutional Goals.

If your employee is **NOT** in an EHRA supervisory position, put an "n/a" in the comments box for the "Supervision" goal.

Comments on performance as it pertains to these goals are optional. If you do not want to comment, please enter an "n/a" in the box to complete the required fields.

On the first two tabs, Institutional Goals and Goals & Objectives, you will enter a **'Rating'** and **'Comments and/or Performance Improvement Plans'**.*

Rating	Required Comments
Exceeding Expectations	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.
Meeting Expectations	"n/a" (comments not required, but field requires an entry)
Not Meeting Expectations	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 & deadlines) and a timeframe in which this performance issue be resolved.

***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.



Institutional Goals **Goals & Objectives** Professional Development Activities Overall Performance

Attachments 0

Check spelling

Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES TO ASSIST YOU WITH NAVIGATING NINERTALENT AND COMPLETING THIS EHRA NF PROCESS ACTION

You can view the employee's position description by clicking the job title under their name at the left of the screen.

Rate your employee's overall job performance based on the Institutional Goals.

If your employee is **NOT** in an EHRA supervisory position, put an "n/a" in the comments box for the "Supervision" goal.

Comments on performance as it pertains to these goals are optional. If you do not want to comment, please enter an "n/a" in the box to complete the required fields.

Required fields are indicated with an asterisk (*).

Institutional Goals

EXPERTISE

Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession. Makes efficient and appropriate use of materials and documents work appropriately. Looks for ways to improve efficiency or quality. Maintains technical skills and relevant professional credentials.

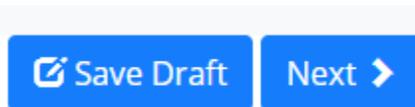
* Comments and/or Performance Improvement Plans

* Rating

Please select ▼

Remove 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.



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[Institutional Goals](#) [Goals & Objectives](#) [Professional Development Activities](#) [Overall Performance](#)

Attachments **0**

Document the individual goals & objectives you established for your employee this cycle and rate them below. You may include as many goals as you would like, but you are **required to document at least one goal.** [Check spelling](#)

Click the "Add Entry" button to open a blank entry box for each subsequent goal.
If you need to delete an entry box, put a check mark in the "Remove Entry?" box and click "Save Draft".

You may [attach any reference materials](#) pertaining to these goals & objectives by using the attachments link above. **(Attachments should be converted to PDF format before uploading.)**

Required fields are indicated with an asterisk (*).

Goals & Objectives

* Goal Name

* Rating
Please select

* Comments

Remove Entry?

Add Entry

Save Draft

Next >

Professional Development Activities

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.**

[Institutional Goals](#) [Goals & Objective](#) [Professional Development Activities](#) [Overall Performance](#)

Attachments **0**

Required fields are indicated with an asterisk (*).

[Check spelling](#)

Professional Development Activities

Describe any job-related personal or professional development activities that the employee has participated in this cycle. Comments are required.

* Professional Development Activities

Save Draft

Next >

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'**

Supervisor Evaluation for Jeanne Madorin (Score in progress: Unrated)

Assess how well your employee met the goals established this cycle by rating each goal and providing feedback regarding the performance which resulted in the rating.

The rating scale is from "1 - Not Meeting Expectations" to "7 - Exceeding Expectations."

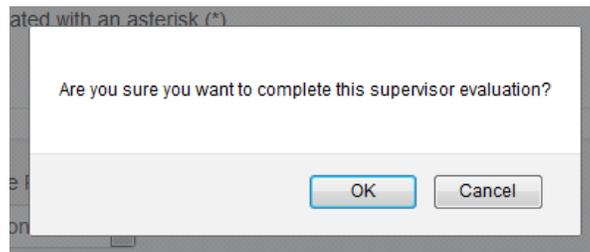
- 1 and 2 = Not Meeting Expectations
- 3, 4, and 5 = Meeting Expectations
- 6 and 7 = Exceeding Expectations

Once you have completed the appraisal, it will go to the employee for acknowledgment.

Institutional Goals Goals & Objectives Professional Development Activities **Overall Performance** Attachments 0

Rate your employee's overall job performance for this performance cycle. Provide comments on the performance demonstrated by your employee in executing their job during this performance cycle. [Check spelling](#)

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'**.



The Supervisor Evaluation has been marked as complete.

Supervisor Evaluation for Alyson Ebaugh (Score: 5 = Meeting Expectations)

Holding place for supervisors to give time to get necessary approvals and schedule meeting with employee.

- Actions
- Print
- Print without
- Acknowledgement
- Return
- Approve

Institutional Goals

The institutional goals in the performance plan define campus-wide performance expectations for all staff employees. For the complete goal descriptions go to the [Institutional Goals Document](#)

EXPERTISE

Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession. Makes efficient and appropriate use of materials and documents work appropriately. Looks for ways to improve efficiency or quality. Maintains technical skills and relevant professional credentials.

[Full "Expertise" Definition HERE](#)

Comments and/or Performance Improvement Plans

Rating

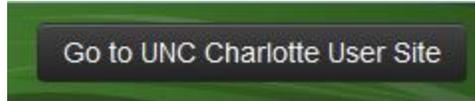
6 = Exceeding Expectations

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')

Home 19 Performance ▾ Progress Notes

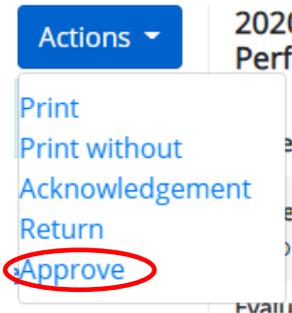
Welcome to the Employee Portal, Gary Stinnett

Your Action Items

Item	Description
2018-2019 EHRA Performance Evaluation for Alyson Ebaugh	Release to Employee
2018-2019 EHRA Performance Evaluation for Jeanne Madorin	Release to Employee



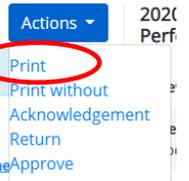
- To release the action to the employee, click the blue 'Actions' button and select 'Approve'. This will send the action to the employee immediately for review and acknowledgement.



- To Print or Save the document as a PDF click the blue 'Actions' button and select 'Print'.

Supervisor Evaluation for Alyson Ebaugh (Score: 5 = Meeting Expectations)

Holding place for supervisors to give time to get necessary approvals and schedule meeting with employee.



Institutional Goals

The institutional goals in the performance plan define campus-wide performance expectations for all staff employees. For the complete goal descriptions go to the [Institutional Goals Document](#)

EXPERTISE

Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession. Makes efficient and appropriate use of materials and documents work appropriately. Looks for ways to improve efficiency or quality. Maintains technical skills and relevant professional credentials.

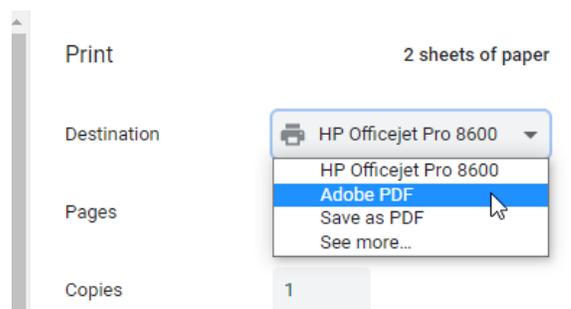
[Full "Expertise" Definition HERE](#)

Comments and/or Performance Improvement Plans

Rating

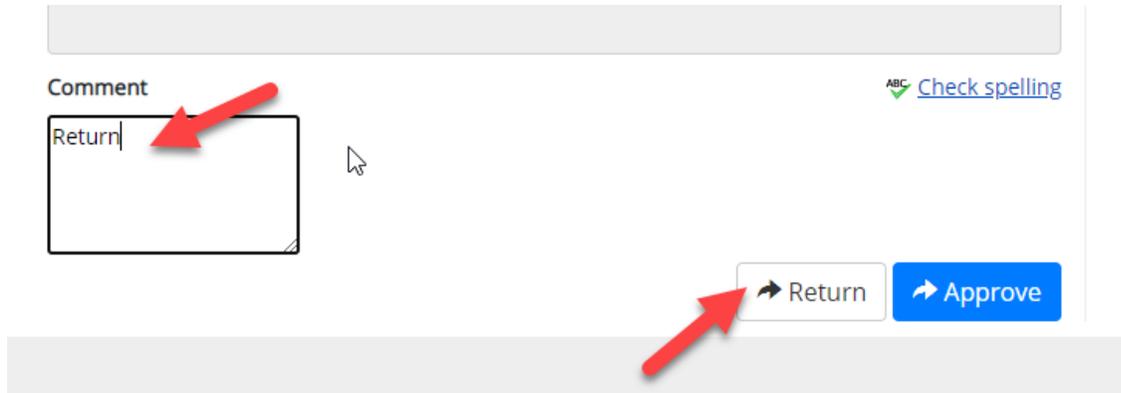
6 = Exceeding Expectations

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.

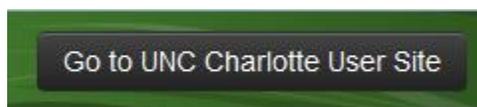


This will move the action back to the 'Supervisor Appraisal' step. Click the 'Supervisor Appraisal' link to access the document. You will also be able to find this action back on your 'Action Items' or 'Home' screen.

The Document has been sent back for revision

Task	Task Owner	Date Opened	Date Compl
1 Supervisor Appraisal	Gary Stinnett Supervisor	2020-05-01	
2 Release Appraisal - Employee	Gary Stinnett Supervisor		
3 Employee Acknowledges Appraisal	Alyson Ebaugh		

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 Task Completed Task Open Task Disputed

2020-2021 EHRA Performance Evaluation Test 3 2					
Last Name	First Name	Anniversary Date	Progress	Program	
Ebaugh	Alyson	2015-01-12	1/3 <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	2020-2021 EHRA Performance Evaluation Test 3	
Kaylor	Kristina	2015-05-04	0/3 <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	2020-2021 EHRA Performance Evaluation Test 3	

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@charlotte.edu or contact the 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.

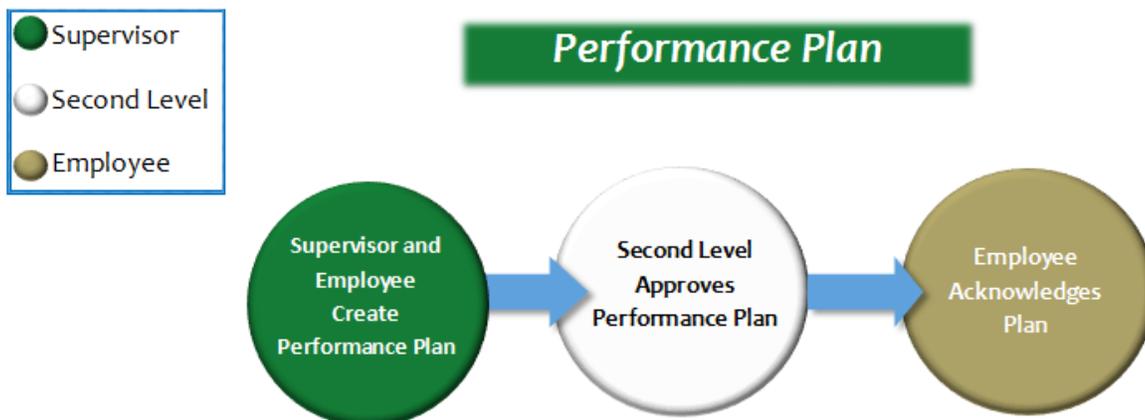


Once you finish revising the appraisal and click complete, the appraisal will go back to the employee to 'Acknowledge' the changes.

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.charlotte.edu/hr>) using your Ninernet credentials:



Log In with NinerNET

Guest User Login:
The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNET credentials.

Username

Password

Log In

CHARLOTTE Web Authentication @ Charlotte

NinerNET ID:

Password:

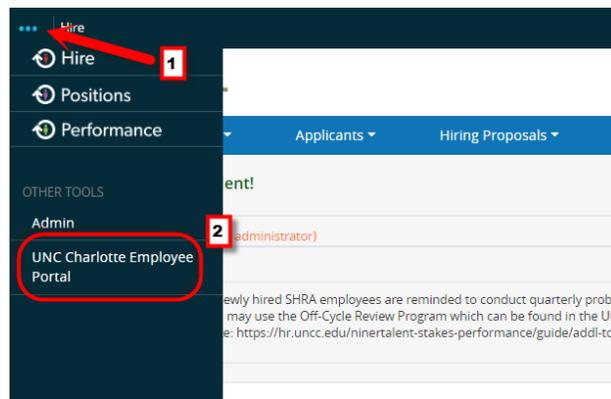
Log In

[Forgot your password?](#)
[Get Duo Code](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security.

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'.



NinerTalent Go to UNC Charlotte User Site PeopleAdmin

Home 4 Performance Progress Notes Hello, Cynthia Log Out

Welcome to the Employee Portal, Cynthia Edwards

- My Reviews
- My Employees' Reviews

Your Action Items

Start typing to search

Item	Description	Due Date	Status
2018-2019 Off-Cycle Reviews for Katherine Tomey	Off Cycle Review	n/a	Available
2018-2019 Off-Cycle Reviews for Tawanda Barr	Off Cycle Review	n/a	Available
2018-2019 SHRA STAKES Review for Katherine Tomey	Performance Plan Creation	2018-05-14 Due 2 months ago	Overdue
2018-2019 SHRA STAKES Review for Tawanda Barr	Performance Plan Creation	2018-05-14 Due 2 months ago	Overdue

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

NinerTalent Home 6 Performance Progress Notes

Katherine Tomey Plan for Katherine Tomey

Supervisor: Cynthia Edwards
Position Description: Human Resources Specialist
Department: Employee Relations

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

[Institutional Goals](#) [Individual Goals](#) [Career Development Plan](#) [Evaluation Method\(s\)](#)

****Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES TO ASSIST YOU WITH NAVIGATING NINERTALENT AND COMPLETING THIS PROCESS ACTION****

Click [Schedule and Components](#) to review the STAKES process steps and definitions.

If you would like to access the employee's position description click their job title, under their name, at the left of your screen.

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.

Plan

Actions ▾

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

Institutional Goals Individual Goals Career Development Plan Evaluation Method(s)

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

Comments or Performance Improvement Plans

Remove Entry?

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

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.

Plan

Actions ▾

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

[Institutional Goals](#) | [Individual Goals](#) | [Career Development Plan](#) | [Evaluation Method\(s\)](#)

Individual Goals

* Goal Name ←

SHRA Performance Training

* Goal Description ←

Roll out training and information sessions for all those effected by the change in the SHRA Performance Appraisal Policy.
- Hold informational forums for employees, training for supervisor, update website, and develop informational resources by – April 1, 2017....

* Weight ←

15

Remove Entry?

Add Entry

If you decide you want to delete a goal altogether, put a check in the **'Remove Entry?'** box under that specific goal and click **'Save'**.

Career Development Goals

The **third tab** section 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.)



Plan for Sarah Ekis

Actions ▾

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

Institutional Goals

Individual Goals

Career Development Plan

Evaluation Method(s)

Career Development Activities

Career development activities are workshops, webinars, job shadowing, committees, self-study, etc. to help the employee maintain, develop, and/or broaden their knowledge, skills, and abilities as is relevant to their current position and/or career path. It is for these reasons that an employee should have at least **one** career development activity on his or her performance plan.

These **activities** are not individually rated, but will be reviewed for progress and future planning and **can be accounted for when rating the institutional goals**.

* Career Development Activity

1. Training
2. Re-certification
3. Cross Training

Remove Entry?

[Compliance & Integrity Goal Activities](#)

The Compliance & Integrity Goal Activities are **annual activities or trainings** that employees University-wide, no matter the department, are expected to complete in order to meet the expectations of the Institutional Goal - Compliance & Integrity. The activities include –

- **Diversity, Equity and Inclusion Learning Plan** – requires 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 **WILL 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 add any additional compliance & integrity activities they require their employee to complete, that are not already listed above. (For example, as the IT & Security Plan activities are not required, any activities required by the supervisor should be included in this box. Also, any additional DEI activity requirement should be entered in the box. Etc.)

* Add'l Compliance & Integrity Goal Activities

Remove Entry?

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

Actions -

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

Institutional Goals Individual Goals Career Development Plan Evaluation Method(s)

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.

Evaluation Method(s)

- 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.



"Weight" can't be blank, "Goal Name" can't be blank

Plan

Actions ▾

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

Institutional Goals Individual Goals Career Development Plan Evaluation Method(s)

ABC [Check spelling](#)

Evaluation Method(s)

2017-2018 SHRA STAKES Review

Review Status:

Overdue

Evaluation Type:

Focal

Program Timeframe:

04/01/17 to 03/31/18

Last Updated:

February 03, 2018

16:03

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.

The Plan has been marked as complete.

Plan

Schedule and Components

****Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES ON HOW TO COMPLETE THIS PERFORMANCE PROCESS****

- Supervisor
- Second Level
- Employee



Actions ▾

- Print
- Copy

2017-2018 SHRA STAKES Review

Review Status:

Overdue

Evaluation Type:

Focal

Program Timeframe:

04/01/17 to 03/31/18

Last Updated:

February 03, 2018

16:03

Last Completed Step:

Performance Plan

Creation

Copy Performance Plan to Other Like Positions

[\(Video available\)](#)



NinerTalent Performance Module - Supervisor Guide

Updated 10.09.2023

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.charlotte.edu/hr>) using your Ninernet credentials:

Log In with NinerNET

Guest User Login:
The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNET credentials.

Username

Password

Log In

Web Authentication @ Charlotte

NinerNET ID:

Password:

Log In

[Forgot your password?](#)
[Get Duo Code](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security.

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

... Hire

Hire

Positions

Performance

OTHER TOOLS

Admin

UNC Charlotte Employee Portal

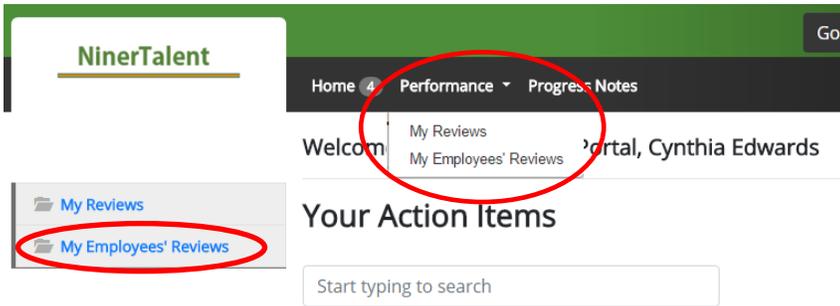
Administrator

Newly hired SHRA employees are reminded to conduct quarterly probat may use the Off-Cycle Review Program which can be found in the UN e: <https://hr.uncc.edu/ninertalent-stakes-performance/guide/addl-too>



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.

Reviews Dashboard

Reset Program 2017-2018 SHRA STAKES Employee Name Group by: Program Advanced

All Reviews 6 Not Started 0 In Process 3 Complete 0 Overdue 0 Disputed 0

2017-2018 SHRA STAKES Review 3

Edwards	Cynthia	2004-12-06	4/9	1	2	3	4							2017-2018 SHRA STAKES Review
Tomey	Katherine	2016-11-28	4/9	1	2	3	4							2017-2018 SHRA STAKES Review
Barr	Norm	2017-09-05	4/9	1	2	3	4							2017-2018 SHRA STAKES Review



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.

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

- Overview
- Plan**
- Supervisor Evaluation
- Self Evaluation
- Approvals & Acknowledgements

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

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

Begin the Plan Copy Process

The Plan for the employee will open. Click the 'Actions' button and choose 'Copy' to begin copying the Plan.

NinerTalent | Go to UNC Charlotte User Site

Home 4 | Performance ▾ | Progress Notes | Hello, Charlotte

Katherine Tomey

Supervisor: Cynthia Edwards
Position Description: Human Resources Specialist
Department: Employee Relations

- Overview
- Plan**

Plan for Katherine Tomey

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

Institutional Goals | Individual Goals | Career Development Plan | Evaluation Method(s)

Actions ▾

- Print
- Copy**

Schedule and Components [Check spelling](#)

****Click HERE TO FIND VIDEO TUTORIALS AND GUIDES ON HOW TO COMPLETE THIS PERFORMANCE PROCESS****

The following flowchart depicts how the performance documents move through NinerTalent from beginning to



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.

Copy Objective Plan

Select Objectives Select Employees Done

Which sections of objectives do you want to copy?

- Select All
- Schedule and Components ←
- Institutional Goals ←
- Individual Goals
- Career Development Activities
- Evaluation Method(s)
- Policy Components ←
- EXPERTISE
- Rating Scale ←
- ACCOUNTABILITY
- CUSTOMER-ORIENTED
- TEAM-ORIENTED
- COMPLIANCE & INTEGRITY
- SUPERVISION (for managers/supervisors)

Continue



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.

Copy Objective Plan

Select Objectives Select Employees Done

Which employees should receive the objective plan?

Showing only employees included in the program, 2017-2018 SHRA Annual Performance Review, who do not already have an objective plan.

<input checked="" type="checkbox"/> Select All	Title	Department	Manager Name
<input checked="" type="checkbox"/> Goldie Dust	Human Resources Specialist	Human Resources	Charlotte College

Copy Plan to selected employees and complete the associated Step. If not checked, Plan will remain in draft status

Back Copy Objective Plan

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.

Copy Objective Plan

Select Objectives Select Employees Done

The objective plan was successfully copied to 1 employees.

[View Norm Niner's Objective Plan](#) or select an employee below to view their objective plan.

	Title	Department	Manager Name
Goldie Dust	Human Resources Specialist	Human Resources	Charlotte College



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

Actions ▾

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

Institutional Goals Individual Goals Career Development Plan Evaluation Method(s)

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.

- Evaluation Method(s)
- Supervisor Observation
 - Employee Self-Report
 - Spot Checks
 - Project Results
 - Work Samples/Statistics
 - Peer Feedback
 - Third Party Feedback

 - Remove Entry?

Save Draft

Complete



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.charlotte.edu/hr>) using your NinerNet credentials:

Log In with NinerNET

Guest User Login:
The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNET credentials.

Username

Password

Log In

CHARLOTTE Web Authentication @ Charlotte

NinerNET ID:

Password:

Log In

[Forgot your password?](#)
[Get Duo Code](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security.

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

... Hire

Hire **1**

Positions

Performance

OTHER TOOLS

Admin

UNC Charlotte Employee Portal **2**

administrator)

ewly hired SHRA employees are reminded to conduct quarterly probat
may use the Off-Cycle Review Program which can be found in the UNI
e: <https://hr.uncc.edu/ninertalent-stakes-performance/guide/addl-too>



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'**.

Item	Description	Due Date	Status
2018-2019 Off-Cycle Reviews for Katherine Tomey	Next Level Supervisor Approval		Available
2018-2019 Off-Cycle Reviews for Tawander Barr	Next Level Supervisor Approval		Available

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

Actions ▾

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.

Comment

Return Approve



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.

Comment

Return

Approve

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.

Go to UNC Charlotte User Site



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](#)).

Task Not Started / Unavailable Task Completed Task Open Task Disputed

2017-2018 SHRA STAKES Review 3											
All Reviews	3	Not Started	0	In Process	0	Complete	3	Overdue	0	Disputed	1
Edwards	Cynthia	2004-12-06	4/9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2017-2018 SHRA STAKES Review					
Tomey	Katherine	2016-11-28	4/9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2017-2018 SHRA STAKES Review
Barr	Norm	2017-09-05	4/9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2017-2018 SHRA STAKES Review

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 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



NinerTalent STAKES Cycle
Annual Timeline



To add an Off-Cycle Review, log into NinerTalent (<http://jobs.charlotte.edu/hr>).



NinerTalent Performance Module - Supervisor Guide

Updated 10.09.2023

Log In with NinerNET

Guest User Login:

The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNET credentials.

Username

Password

Log In

CHARLOTTE Web Authentication @ Charlotte

NinerNET ID:

Password:

Log In

[Forgot your password?](#)
[Get Duo Code](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security

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

... Hire

Hire **1**

Positions

Performance

OTHER TOOLS

Admin

UNC Charlotte Employee Portal **2**

Applicants Hiring Proposals

ent!

(administrator)

ewly hired SHRA employees are reminded to conduct quarterly probat
may use the Off-Cycle Review Program which can be found in the UNI
e: <https://hr.uncc.edu/ninertalent-stakes-performance/guide/addl-too>



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'**.

The screenshot shows the NinerTalent Employee Portal interface. The top navigation bar includes the NinerTalent logo, a search bar, and links for 'Go to UNC Charlotte User Site' and 'PeopleAdmin'. The main content area displays 'Welcome to the Employee Portal, Cynthia Edwards' and 'Your Action Items'. A search bar is present above a table of items. The table has columns for Item, Description, Due Date, and Status. The item '2018-2019 Off-Cycle Reviews for Tawander Barr' is circled in red.

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

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.

The screenshot shows a form with the following sections:

- Date:** A text input field labeled "Date of Review".
- Review Type:** A dropdown menu labeled "Please select" with a callout box "Off-Cycle Review Type".
- Areas that need improvement:** A list of checkboxes: Expertise, Accountability, Customer-Oriented, Team-Oriented, Compliance & Integrity, and Supervision. A callout box "Any Institutional Goal areas where employee needs to show improvement" points to this list.
- Overall Performance Rating:** A dropdown menu labeled "Please select" with a callout box "Is the employee meeting expectations overall?".
- Comments:** A large text area for entering comments.
- Remove Entry?:** A checkbox at the bottom left.

- **Comments**
- **Issues/areas for improvement**
- **Deliverables to aid in improvement**

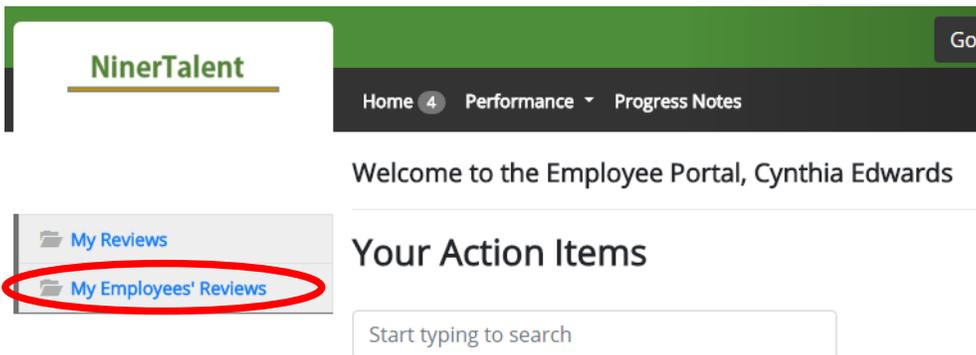
When you complete your first off-cycle review in the current performance cycle you will click the **'Complete'** button. At this time the review will go to your employee for Acknowledgement. Once the employee has acknowledged the review, it will be available for you to go back in to the same program 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

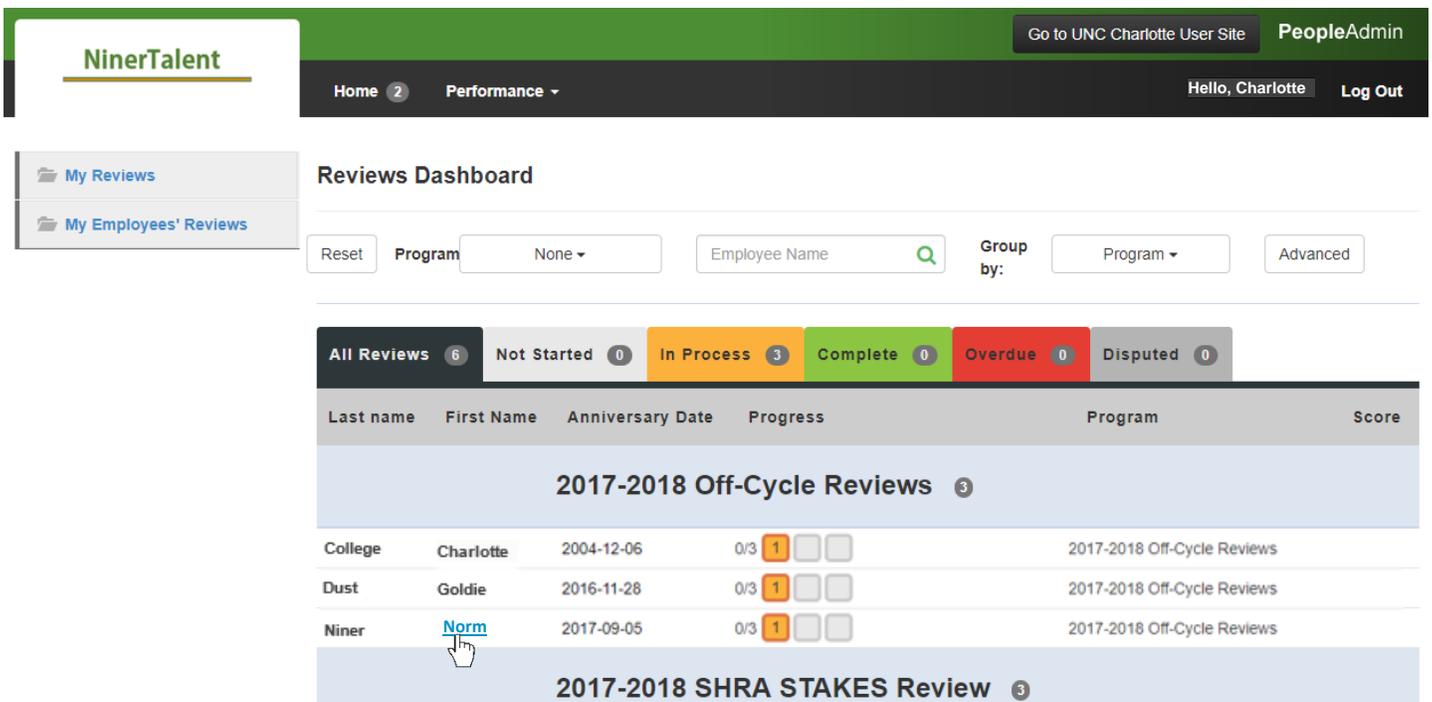
When you reach the UNC Charlotte Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention.

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.

The screenshot shows the NinerTalent Performance Module interface. The top navigation bar includes "Home 30", "Performance", "Go to UNC Charlotte User Site", and "PeopleAdmin". The user is identified as "Hello, Charlotte" with a "Log Out" button. The main content area displays a table of tasks:

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Off Cycle Review	Charlotte College Supervisor		2017-11-07	
2 Employee Acknowledges Off Cycle Review	Norm Niner			
3 Supervisor Evaluation	Charlotte College Supervisor	2020-12-31		

On the left, the navigation pane shows "Overview" and "Plan" (circled in red). Below the table, there is a sidebar for "2017-2018 Off-Cycle Reviews" with details: Review Status: Open, Evaluation Type: Focal, Program Timeframe: 03/01/17 to -, Last Updated: November 07, 2017 20:43, and Last Completed Step: 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

The screenshot shows a dropdown menu for the "Actions" button (circled in red). The menu options are: Print, Revise, and Copy.

The screenshot shows the appraisal criteria details page. The information displayed is:

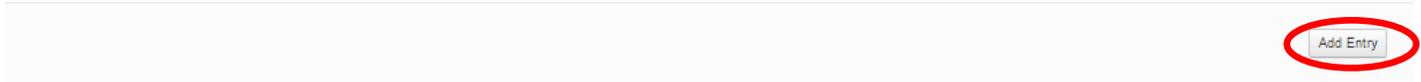
- Date:** 2017-10-31
- Review Type:** Probationary
- Rating:** Not Meeting Expectations
- Comments:**

Employee needs to improve his skills in the areas of Expertise and Customer-Orientation. 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.

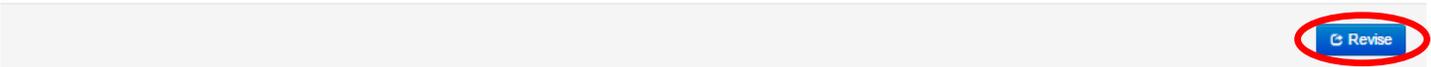
By the next quarter review the employee needs to become familiar with the the policies, procedures, and processes of the department. In order to assist in gaining this



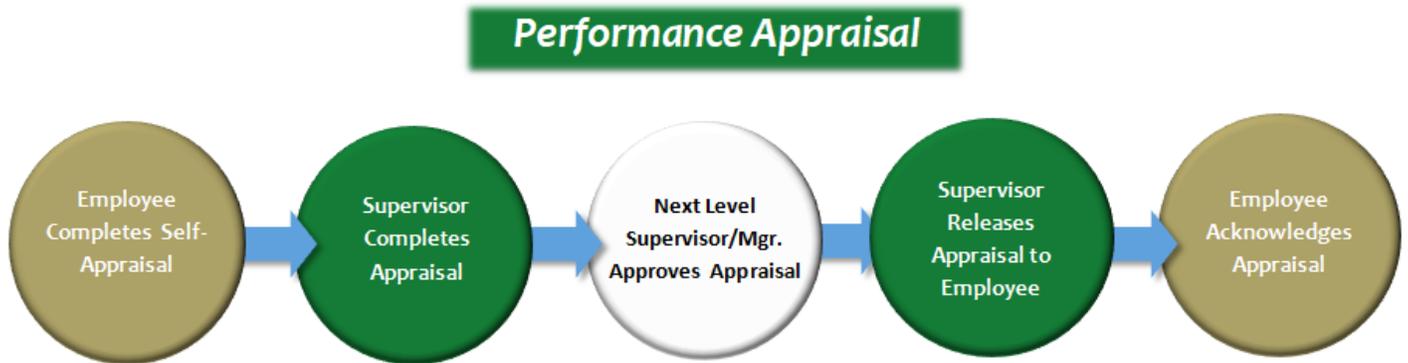
After 'Revise' is selected, the following 'Add Entry' option will appear beneath the last off-cycle entry that was made. Click the **'Add Entry'** button to open up a new entry field and begin drafting your next off-cycle review.



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

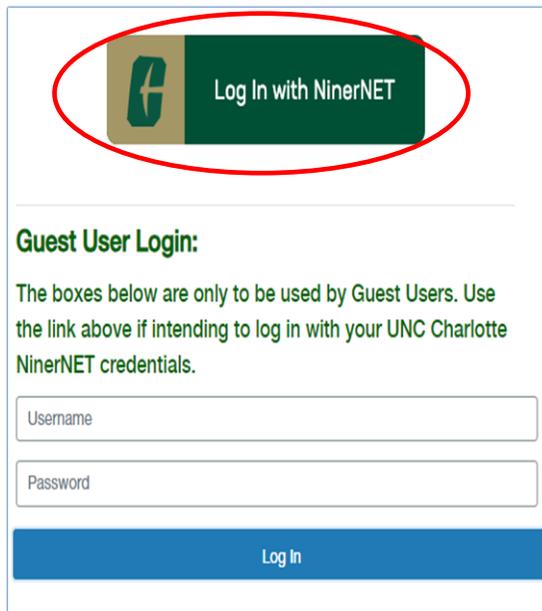


*Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your self-appraisal

Supervisor Appraisal

(Video available)

To, log into NinerTalent (<http://jobs.charlotte.edu/hr>).



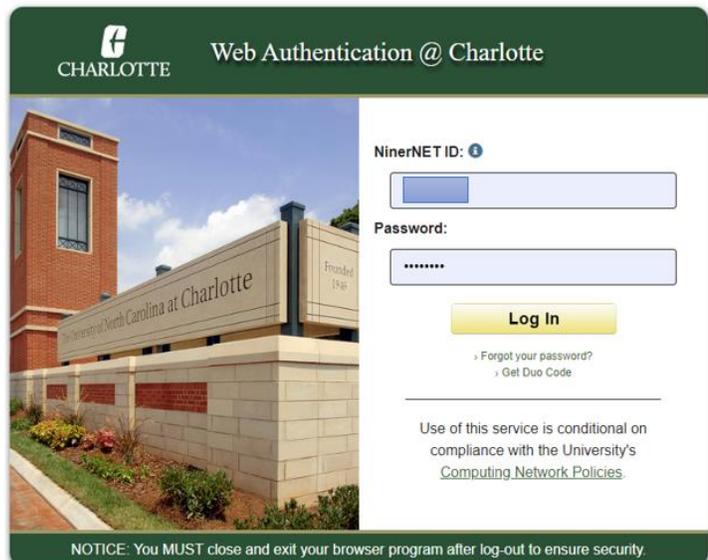
Log In with NinerNET

Guest User Login:
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Username

Password

Log In



CHARLOTTE Web Authentication @ Charlotte

NinerNET ID:

Password:

Log In

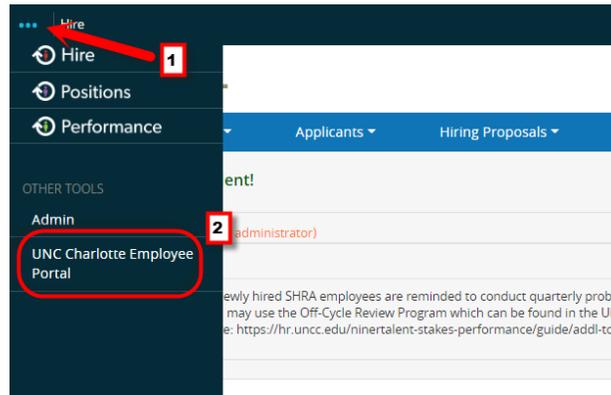
[Forgot your password?](#)
[Get Duo Code](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security



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**'.



NinerTalent Go to UNC Charlotte User Site PeopleAdmin

Home 4 Performance Progress Notes Hello, Cynthia Log Out

Welcome to the Employee Portal, Cynthia Edwards

- My Reviews
- My Employees' Reviews

Your Action Items

Start typing to search

Item	Description		
2018-2019 Off-Cycle Reviews for Katherine Tomey	Off Cycle Review	n/a	Available
2018-2019 Off-Cycle Reviews for Tawander Barr	Off Cycle Review	n/a	Available
2018-2019 SHRA STAKES Review for Katherine Tomey	Supervisor Appraisal	2018-05-14 Due 2 months ago	Overdue
2018-2019 SHRA STAKES Review for Tawander Barr	Supervisor Appraisal	2018-05-14 Due 2 months ago	Overdue

Once selected, the Supervisor Evaluation will appear. There are **five (5) tab sections** across the top of the Supervisor Evaluation.

Supervisor Evaluation

(Score in progress: Unrated)

Actions

Once you have completed your appraisal, the next level supervisor will be notified to approve it. You will meet with your employee after the next level supervisor has approved the appraisal. **Please be sure to read all of the instructions on the "Overall Comments" tab regarding the new scoring guidelines for the UNC system policy.

- Institutional Goals
- Individual Goals
- Career Development Plan
- Overall Performance
- Attachments 0

The **first-** and second-tab sections are the Institutional Goals and Individual Goals. On these tabs, 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.

Rating	Required Comments
Exceeding Expectations	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.
Meeting Expectations	"n/a" (comments not required, but field requires an entry)
Not Meeting Expectations	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 & deadlines) and a timeframe in which this performance issue be resolved.
--	--

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

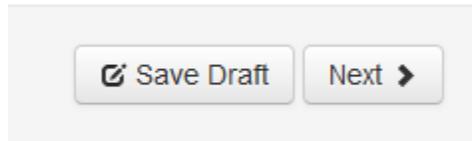
Please select ▼

* 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

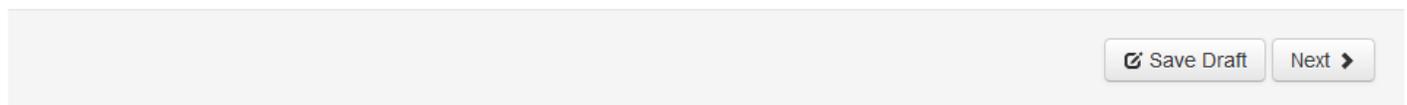
The next tab section indicates Career Development Goals. On this tab, you will enter Supervisor Comments, as appropriate or necessary.

Career Development Goals

Goal(s):

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

Comments



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.

Supervisor Evaluation for Norm Niner (Score in progress: Not Meeting Expectations)

Actions ▾

Once you have completed your appraisal, the next level supervisor will be notified to approve it. You will meet with your employee after the next level supervisor has approved the appraisal. **Please be sure to read all of the instructions on the "Overall Comments" tab regarding the new scoring guidelines for the UNC system policy.

Institutional Goals

Individual Goals

Career Development Plan

Overall Performance

Attachments 0

Remember: Pursuant to the UNC system-wide SHRA Performance Appraisal policy, employees who receive a rating of "Not Meeting Expectations" on any goal, or for whom a formal disciplinary action (written warning or greater) was initiated during the current cycle, may not receive an overall rating of "Exceeding Expectations".

Therefore, the "Score in progress" above will reflect the Overall Performance Rating UNLESS:

- The score is "Exceeding Expectations" **AND**
- The employee was issued a disciplinary action during the cycle and/or has a rating of "Not Meeting Expectations" on any goal in this appraisal

In this scenario THE EMPLOYEE'S SCORE SHOULD BE DOCUMENTED AS "MEETING EXPECTATIONS" in accordance with our policy.
(For more information on these scoring guidelines, please consult the UNC SHRA Performance Appraisal Policy.)

Required fields are indicated with an asterisk (*).

Overall Performance Comments

Please enter comments regarding the employee's overall performance and select "Complete" when you are finished with your evaluation.

* Overall Performance Comments

test

* Was a formal disciplinary action initiated for this employee this cycle (April 1, 2018 - March 31, 2019)?

No ▾

* Does your employee's "Score in Progress" reflect that he/she is "Exceeding Expectations" even though you answered "Yes" to the question above?

No, this does not apply to my employee. ▾

Save Draft

Complete

Scoring

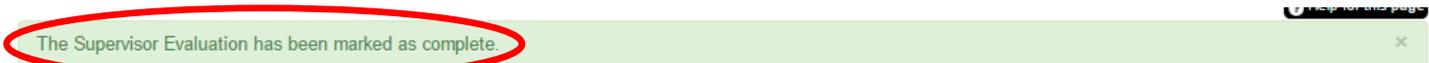
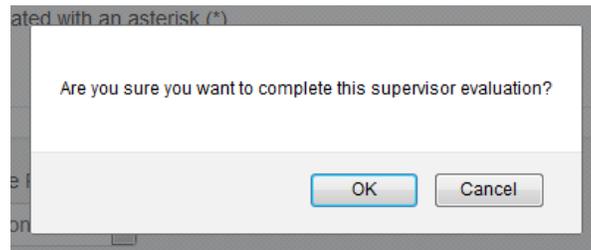
The scoring is done automatically and takes any scores of "Not Meeting Expectations" into account, ensuring that no one with an individual score of "Not Meeting Expectations" can receive an overall score of "Exceeding Expectations".

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

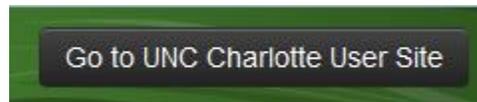
- Does your employee's 'Score in Progress' reflect that he/she is "Exceeding Expectations" even though you answered "Yes" to the question above?
 - If you answered "No" to the first question, answer "No" for the second.
 - If you answered "Yes" to the first question, make sure your employee's running 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**'.



The Supervisor Evaluation has been marked as complete.

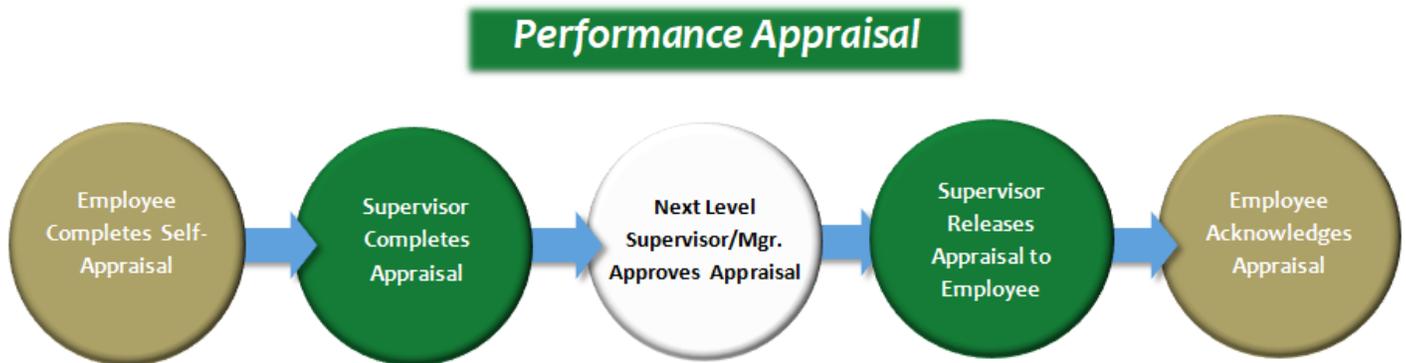
To get back to NinerTalent, click 'Go to UNC Charlotte User Site' in the top right hand corner:



Next-Level Supervisor Approves Appraisal

(Video available)

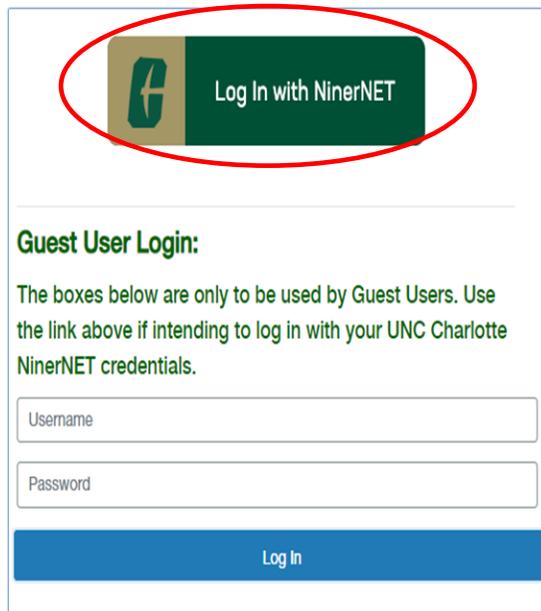
Annual Review Process Steps



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

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.charlotte.edu/hr>) using your NinerNet credentials:



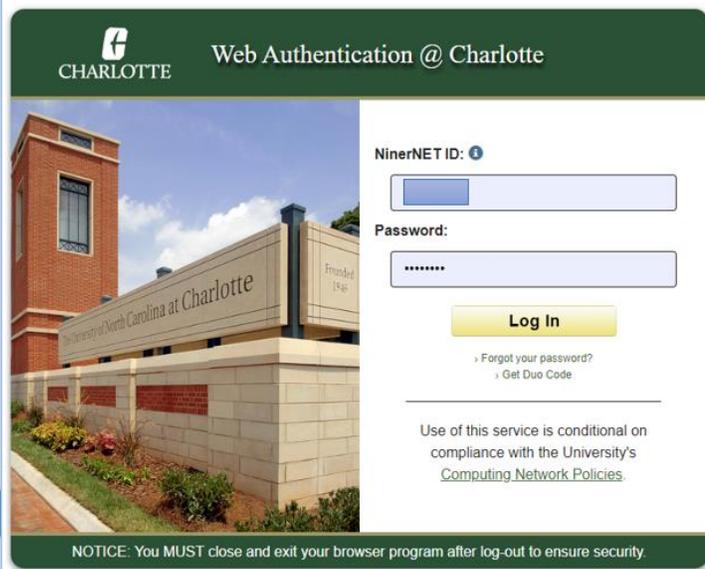
Log In with NinerNET

Guest User Login:
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Username

Password

Log In



Web Authentication @ Charlotte

NinerNET ID:

Password:

Log In

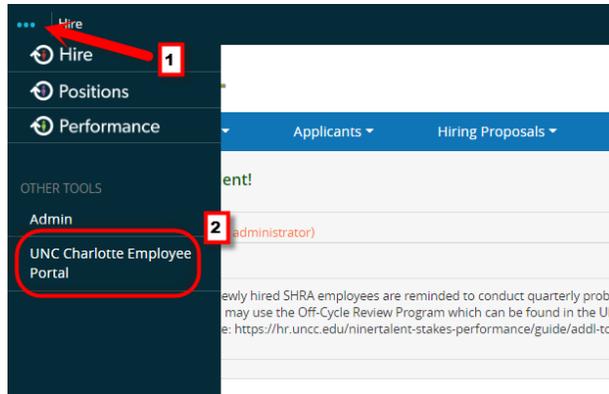
[Forgot your password?](#)
[Get Duo Code](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security.



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**’.

NinerTalent

Go to UNC Charlotte User Site PeopleAdmin

Home 4 Performance Progress Notes Hello, Cynthia Log Out

Welcome to the Employee Portal, Cynthia Edwards

My Reviews
My Employees' Reviews

Your Action Items

Start typing to search

Item	Description	Status
2018-2019 Off-Cycle Reviews for Katherine Tomey	Next Level Supervisor Approves Appraisal	Available
2018-2019 Off-Cycle Reviews for Tawander Barr	Next Level Supervisor Approves Appraisal	Available



Please review the employee appraisal for accuracy and rating consistency with similar positions across the unit. **Please note: If the employee received a formal disciplinary action initiated after April 1st, 2017, then the employee must receive a rating of "Not Meeting Expectations" for the goal(s) relevant to the disciplinary action. If the employee received any rating of "Not Meeting Expectations" OR if there was a formal disciplinary action initiated after April 1st, 2017, then the final overall rating cannot be "Exceeding Expectations". IF THE RATING IS TOO HIGH, please select "Return" at the bottom of the page to send it back to the supervisor for revision.

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

Comment

Evaluation Reviewer Comments required if Return option is selected below

Return Approve

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:

Comment can't be blank

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.



NinerTalent Go to UNC Charlotte User Site PeopleAdmin

Home 36 Performance Hello, Charlotte Log Out

Norm Niner

Supervisor: Charlotte College

Position Description: Human Resources Manager

Department: Employee Relations

- Overview
- Plan
- Supervisor Evaluation
- Self Evaluation
- Approvals & Acknowledgements
- Progress Notes
- History
- My Reviews
- My Employees' Reviews

The Document has been sent back for revision x

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

2017-2018 SHRA STAKES Review

Review Status: Open

Evaluation Type: Focal

Program Timeframe: 04/01/17 to 03/31/18

Last Updated: February 03, 2018 17:25

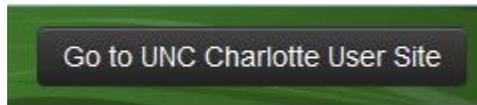
Last Completed Step: Next Level Supervisor Approves Appraisal



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.

Home 19 Performance ▾ Progress Notes

Welcome to the Employee Portal, Gary Stinnett

Your Action Items

Item	Description
2020-2021 SHRA STAKES Performance Review Cynthia Edwards	Release to Employee
2020-2021 SHRA STAKES Performance Review Sarah Ekis	Release to 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**'.

Actions ▾

- Print
- Print without Acknowledgement
- Return
- 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**'.



Supervisor Evaluation for Alyson Ebaugh (Score: 5 = Meeting Expectations)

Actions

- Print
- Print without
- Acknowledgement
- Return
- Approve

Holding place for supervisors to give time to get necessary approvals and schedule meeting with employee.

Institutional Goals

The institutional goals in the performance plan define campus-wide performance expectations for all staff employees. For the complete goal descriptions go to the [Institutional Goals Document](#)

EXPERTISE

Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession. Makes efficient and appropriate use of materials and documents work appropriately. Looks for ways to improve efficiency or quality. Maintains technical skills and relevant professional credentials.

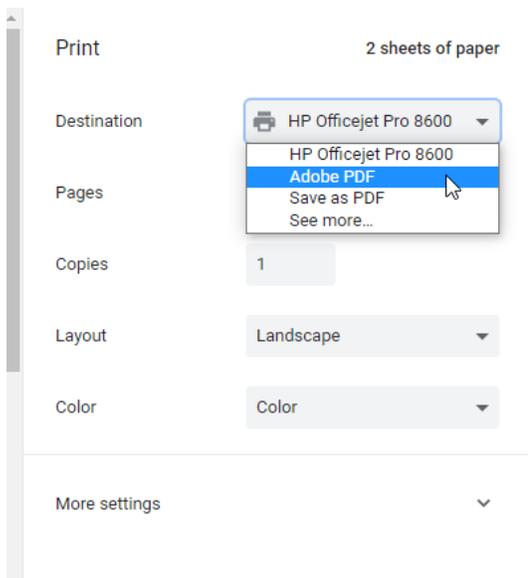
[Full "Expertise" Definition HERE](#)

Comments and/or Performance Improvement Plans

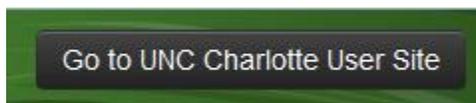
Rating

6 = Exceeding Expectations

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

[\(Video available\)](#)

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.

Task Not Started / Unavailable Task Completed Task Open Task Disputed

All Reviews 3 **Not Started** 0 **In Process** 0 **Complete** 3 **Overdue** 0 **Disputed** 1

2017-2018 SHRA STAKES Review 3

Edwards	Cynthia	2004-12-06	4/9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2017-2018 SHRA STAKES Review
Tomey	Katherine	2016-11-28	4/9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2017-2018 SHRA STAKES Review
Barr	Norm	2017-09-05	4/9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2017-2018 SHRA STAKES Review

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@charlotte.edu or contact the HR Consultant of Performance Management, 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.