NinerTalent Performance Portal - Employee Guide

Human Resources

UNC Charlotte

Contents

Navigating NinerTalent Performance Module

(video available)

NinerTalent is UNC Charlotte's Human Resources Management System (HRMS) for Employees and Hiring Managers. 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, appraisals, 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 ellipsis **'...'** in the top 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 (i.e., Employee acknowledgement). Note any 'Due Date(s)' indicated.

'Item' indicates the review type (Annual, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. Select the item link that corresponds to the process step description you want to complete.

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

Once you have completed the actions in 'Your Action Items' they will no longer appear on this screen unless a Human Resources administrator reopens it.

If you would like to review documents that you have completed and are no longer on 'Your Action Items' page, click **'My Reviews'** to access the 'Review Dashboard.'

Searching and Dashboard

You can search for reviews by going to the link at the top left of your screen. Click **'My Reviews'** to see past and current performance review cycles documented in the NinerTalent system.
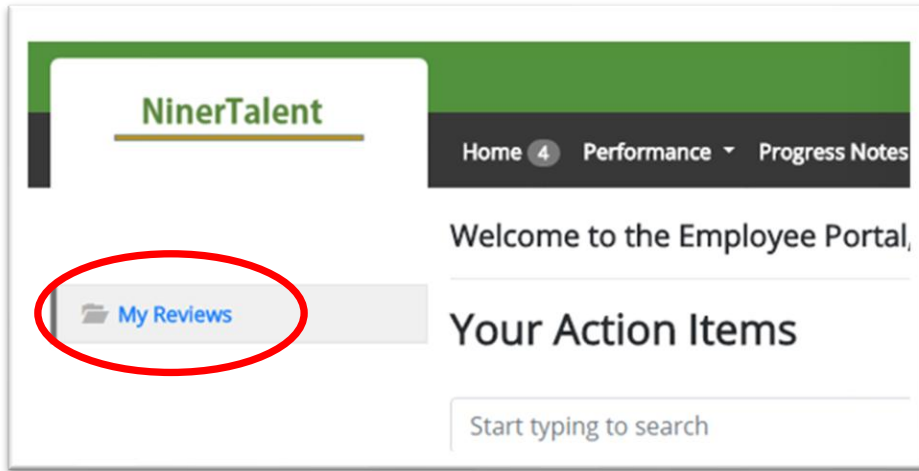
When the screen below appears, you will be able to select from a list of past and current performance review cycles. You can also use the filters on the left hand side to narrow search results.

Select the desired highlighted program you want to review or click the blue 'View Review' button to open the overview page.

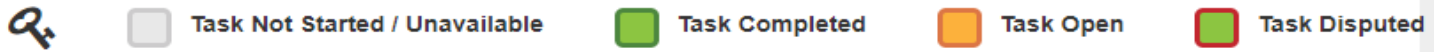The **"Overview"** screen will show you all the performance tasks that will or have occurred in this cycle, the task owner, the date the task opened, the date the owner completed the task, and the due date of each task. The tasks for which you are the owner are in blue. Use the following key to identify 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 current job description by clicking the job title, under your name, in the top left corner of the screen. (See arrow)

Note: This is a general setup and is not exclusive to either EHRA-NF or SHRA.

Using Progress Notes

([See Navigation Video](#))

At any time after you have acknowledged your performance plan, you may use the Progress Notes functionality to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching. Progress Notes are your personal records to assist with completion of the performance evaluation process. They are confidential and <u>are not viewable</u> by your supervisor unless you share them with your supervisor via the share button. Your supervisor may also share progress notes with you. Remember, all documented items should be professional and performance related.

To add Progress Notes, log into NinerTalent (http://jobs.charlotte.edu/hr) using your NinerNet credentials:

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

To document a progress, note for yourself, you can click the '**Progress Notes'** button at the top of your screen.
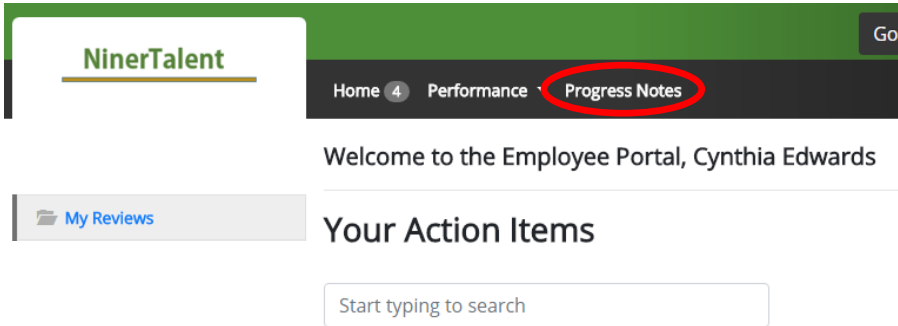
Once selected, the following screen will appear. Click the blue **'Create Progress Note'** button on the right side of your screen.
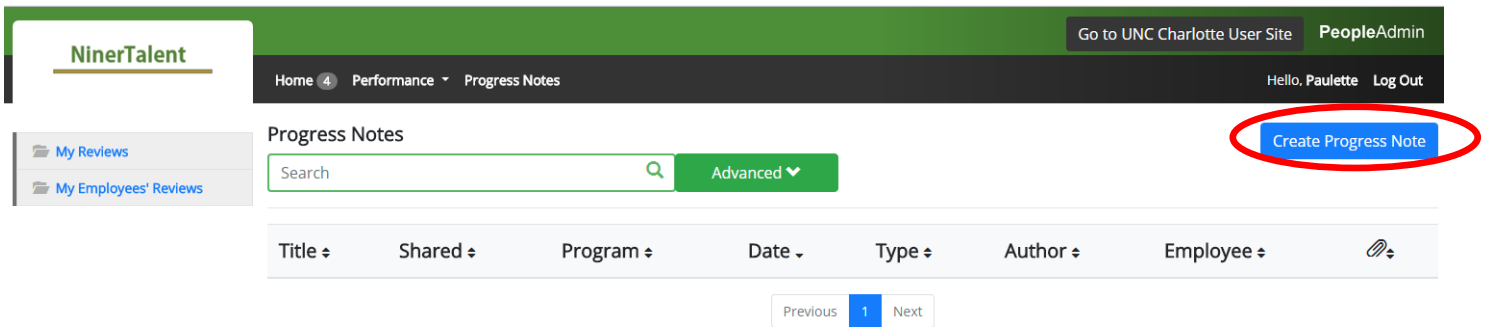
Enter any information that may be useful in documenting your performance, add an attachment (if desired), and click **'Create.'**
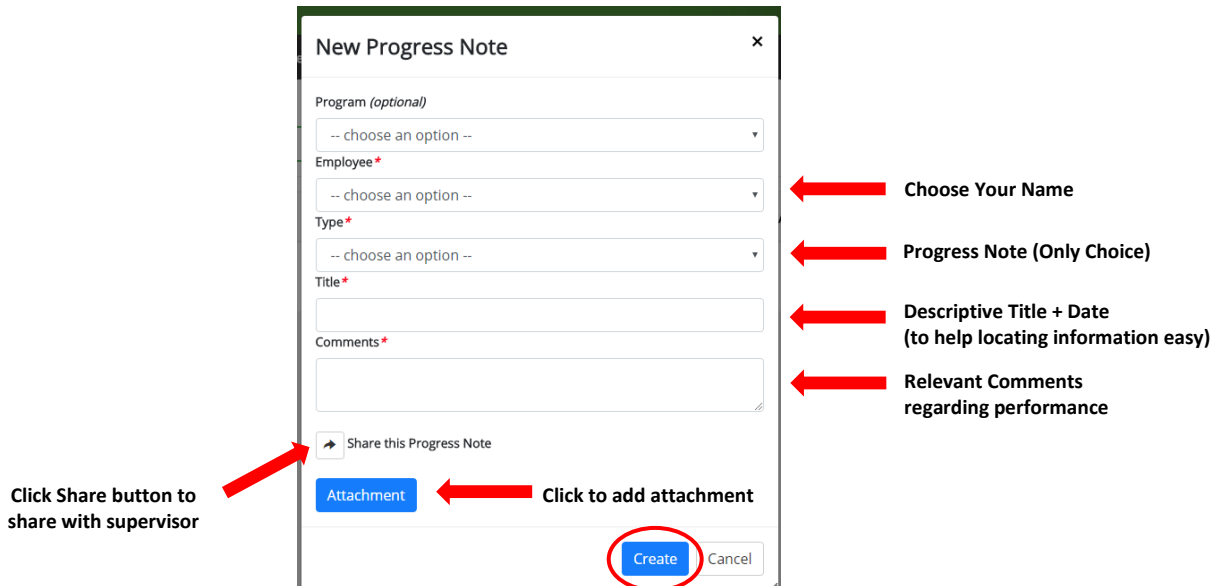
EHRA Performance Management

The *UNC Charlotte Employee Portal* is used to: 1) **Create** the Goals & Objective Plan 2) **Modify** an existing plan 3) **Document** performance feedback (Progress Notes) and to 4) **Complete** an EHRA Appraisal.

EHRA Goals & Objectives Process Steps

Employee enters EHRA Goals & Objective Plan (Performance Plan)

To create an EHRA-NF Performance Plan, log into NinerTalent (http://jobs.charlotte.edu/hr) using your Ninernet credentials:

Once logged in, click the ellipsis '...' in the top 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 (Plan Creation, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To create a new performance plan, select the item for your performance plan with the description **'Performance Plan Creation.'**

Note! Before the new performance cycle begins and you enter the new performance plan in NinerTalent, schedule a meeting with your supervisor. During this meeting, discuss the department or unit's strategic goals for the upcoming cycle. Collaborate with your supervisor to determine the individual and professional development goals that should be included in your 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 Evaluation your Supervisor will appraise.
- **Helpful links & instructions** to help you complete this performance evaluation

Institutional Goals

The **first tab** section is titled **'Institutional Goals.'** This tab is where you will enter a comment for each corresponding institutional goal and any specific standards of performance if desired.

If you are not a supervisor – be sure to input 'N/A' as the comment section for the Supervision goal.

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

Define campus-wide performance expectations for employees here...

☐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).
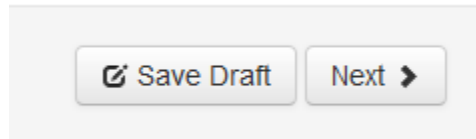
Individual Goals

The **second tab** section is titled **'Individual Goals.'** This is where you will enter three to five individual goals. Unlike the institutional goals, individual goals are NOT intended to cover all aspects of an employee's work product or performance – these are big ticket items to be completed in the current 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.

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.'**

Professional Development Activities

The third tab section is the Professional Development Activities/Plan. Here, you can enter or edit any Professional Development Activities and Compliance & Integrity Goal Activities that you have discussed with your supervisor.

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.

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   Goals & Objectives Plan   Professional Development Plan   Evaluation Method(s)

Required fields are indicated with an asterisk (*).

Professional Development Activities

Professional 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 professional development activity** on his or her goals & objective 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

B   I   S   🔗   T̄   "   <>   ☰   ☰   ☰   ☰   ↰   ↱

Participate in a training, course and/or project that will enhance your career aspirations.

☐Remove Entry?

Compliance & Integrity Goal Activities

Compliance & Integrity Goal Activities are **annual training sessions or activities** that all University employees, regardless of department, are required to complete. These activities ensure everyone meets the standards set by the Institutional Goal of Compliance & Integrity. The activities include –

- **Environmental Health & Safety Compliance Plan** – requires supervisors to inform employees to complete any identified safety training that pertains to their position. These trainings 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.)

Note: 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**. In this section, you will select the Evaluation Methods that you and your supervisor have previously agreed upon. These methods will be used to assess your performance during the annual appraisal. You can choose as many evaluation methods as you find appropriate or necessary.
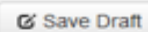
Note: If you still need to finalize some elements in the document prior to sending it to the Next-Level Supervisor for review, choose **'Save Draft.'**

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

If you fail to complete any of the required sections in the plan you will get the following message, the plan will remain in draft mode. The message will give a general indication as to why the process was unable to be completed. Correct these errors and click the **'Complete'** button again to finish this task.

If your plan goes through successfully, you will see the following message at the top of your screen. And the completed plan document will be available for you to print and/or copy via the **'Actions'** button.
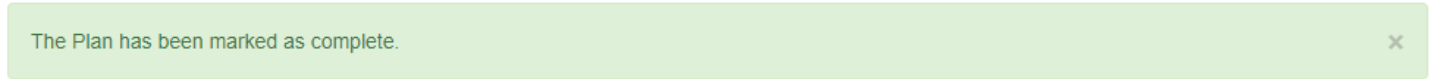
Employee Acknowledges EHRA Goals & Objective Plan (Performance Plan)

To acknowledge a Goal & Objective Plan, log into NinerTalent (http://jobs.charlotte.edu/hr) using your Ninernet credentials:
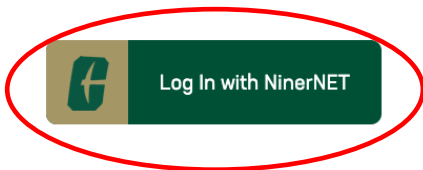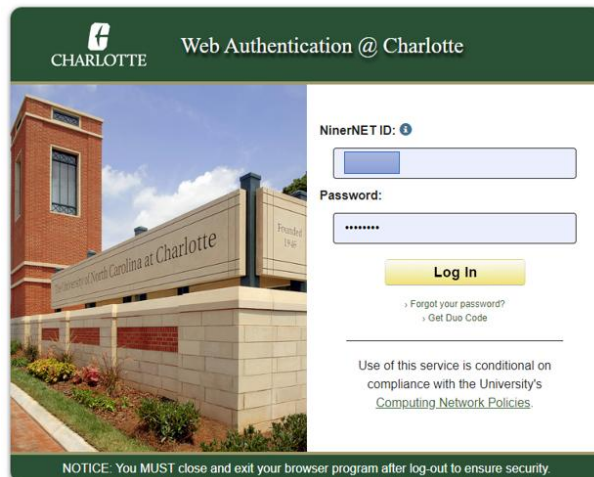
Once logged in, click the ellipsis '**…**' in the top left hand corner to initiate the dropdown and click '**UNC Charlotte Employee Portal.'**

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 Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To complete click the linked item that corresponds with the '**Employee Acknowledges Goals & Objective Plan'** action.

Once selected, the Performance Plan will appear.

Click the **'Actions'** button and print your plan either to a pdf document or on paper so you have a record of the documentation. **DO NOT** Acknowledge or Dispute your plan yet.

Review the performance expectations contained in your performance plan (Institutional, Individual, and Professional Development Goals) and the evaluation methods that your supervisor plans to use to assess your performance throughout the cycle.

When you are done reviewing your performance plan information, type in any comments as necessary in the 'Comments' box below your plan and click the **'Acknowledge'** or **'Dispute'** button at the bottom of the page. Choosing either button indicates that you have reviewed your performance plan and understand both your work expectations and the evaluation methods that will be used to assess your performance.

If you choose to 'Dispute,' please use the 'Comments' box to document your specific disagreement. Selecting 'Dispute' indicates that you disagree with some information contained in the plan.

Note: **It is recommended that you speak with your supervisor about any dispute prior to submitting it. It may be something that can be resolved before being documented in this permanent record.**

EHRA Performance Management

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

EHRA Annual Review Process Steps

EHRA-NF Performance Appraisal

> ***Attn: Employees,** though this is an optional step, you must log into NinerTalent to select the option to bypass the Self Appraisal.
>
> ****Attn: Supervisors,** if required by your leadership, ensure the appraisal is approved by the Next Level Supervisor prior to clicking the complete button in NinerTalent.

Employee Completes Self-Appraisal (or Self Evaluation)

(Video available)

Effective March 1, 2024, the Employee Self-Appraisal can be found in the NinerTalent system. The Self -Evaluation period typically runs annually from March through June.

The Employee Self-Appraisal is an optional step determined by you and your supervisor. Even if your supervisor does not require it, it is recommended that you complete the Self-Appraisal during the last quarter of the annual evaluation period.

The Self-Appraisal will launch in NinerTalent at the beginning of March. **Although this step is optional, employees must log into NinerTalent to either bypass the evaluation or complete it in its entirety**.

The Self-Evaluation consists of three parts: **"Personal Self-Assessment, Professional Development Plan,** and **Overall Performance.**

Personal Self-Assessment consists of four questions that focus on reflecting on your performance over the past cycle and planning goals for the upcoming cycle. See visual reference below.

The **Professional Development Plan**, inquires about your progress with your professional development plan and confirms that you have completed any required Environmental Health & Safety (EHS) and IT Security & Compliance training.

The **Overall Performance Comments** section provides an opportunity to share your thoughts on your overall performance and any additional information you wish to convey to your supervisor.

Employee Acknowledges EHRA Appraisal

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

Once logged in, click the ellipsis '**...**' in the top 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.

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 Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To review your supervisor's evaluation of your performance, select an item link that corresponds with the action **'Employee Acknowledges Appraisal.'**

When you choose 'Employee Acknowledges Appraisal' the following screen will appear. You will see your overall performance rating at the top right of the screen. (This rating is valid in all instances **EXCEPT** if you have a rating of "Exceeding Expectations" and have a disciplinary action in the current cycle that was not reflected in your appraisal.)

Click the **'Actions'** button and print your appraisal either to a pdf document or on paper so you have a record of the documentation. **DO NOT** Acknowledge or Dispute your plan yet.

When you have completed a review of your evaluation information, type in any comments as necessary in the 'Comments' box at the end of the page and click the **'Acknowledge'** or **'Dispute'** button.

Acknowledge or Dispute

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

Once you have acknowledged your performance appraisal, the following screen will appear. **If you 'Dispute' the appraisal you will see the Employee Acknowledgment step will be outlined in red as seen below.**

Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal. *They will only be aware of this if you notify them, or if they are looking at the performance dashboard like the one below.*

Returning to the Performance Dashboard

On the screen above, you have access to the Supervisor Evaluation, Approvals & Acknowledgements, and Progress Notes.

You can go back to review your appraisal by clicking the **'Supervisor Evaluation'** link on the left navigation pane on the right. You can print your evaluation by clicking the blue **'Actions'** button in the top right corner of the page to reveal the **'Print'** option.

Note: **Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal.** They will only be aware of this if you notify them yourself, or if they are looking at the performance dashboard like the one depicted on the previous page.

You can access the approval notes from your Next Level Supervisor and your own "Acknowledgments" by clicking the **'Approvals & Acknowledgements'** link on the next navigation pane.

Congratulations!

You have successfully completed all required process steps associated with the performance evaluation process.

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

SHRA Performance Management

The Performance Management module is used to: 1) **Create** a SHRA Performance Plan; 2) **Modify** an existing SHRA Performance Plan; and to 3) **Complete** a SHRA Appraisal.

Performance Plan Process Steps
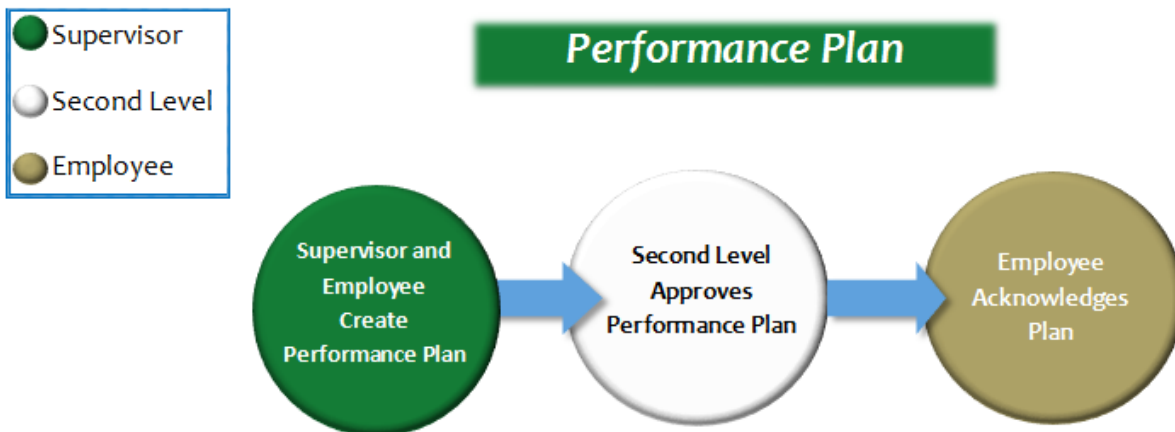
Employee Acknowledges SHRA Performance Plan

(Video available)

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

Once logged in, click the ellipsis '**...**' in the top 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 Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To complete click the linked item that corresponds with the **'Employee Acknowledges Performance Plan'** action.

Once selected, the Performance Plan will appear.

Click the **'Actions'** button and print your plan either to a pdf document or on paper so you have a record of the documentation. **DO NOT** Acknowledge or Dispute your plan yet.

Review the performance expectations contained in your performance plan (Institutional, Individual, and Career Development Goals) and the evaluation methods that your supervisor plans to use to assess your performance throughout the cycle.

When you are done reviewing your performance plan information, type in any comments as necessary in the 'Comments' box below your plan and click the **'Acknowledge'** or **'Dispute'** button at the bottom of the page. Choosing either button indicates that you have reviewed your performance plan and understand both your work expectations and the evaluation methods that will be used to assess your performance.

If you choose to 'Dispute,' please use the 'Comments' box to document your specific disagreement. Selecting 'Dispute' indicates that you disagree with some information contained in the plan.

Note: It is recommended that you speak with your supervisor about any dispute prior to submitting it. It may be something that can be resolved before being documented in this permanent record.

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.

Once you have acknowledged your performance plan, the following screen will appear. **If you 'Dispute' the plan you will see the Employee Acknowledgment <u>step</u> will be outlined in red as seen below.**

Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your plan. They will only be aware of this if you notify them yourself, or if they are looking at the performance dashboard like the one below.

Returning to the Performance Dashboard

On this screen, you may review your Plan, your Approvals & Acknowledgements, and add Progress Notes.

You can get back to the print option by clicking the **'Plan'** tile. When your plan opens, click the blue **'Actions'** button in the top right corner of the page to reveal the **'Print'** option.

Also, please note, once your performance plan has been through the acknowledgement process, the Employee Self-Appraisal may appear in 'Your Action Items' box as seen below. This should not appear until March 1. <u>Please do not complete this action early if it appears in your queue prior to March 1</u>.

Note: The employee self-appraisal is the first step of your annual evaluation and is not due to be started & completed until the end of March (which is the last month in the performance cycle).
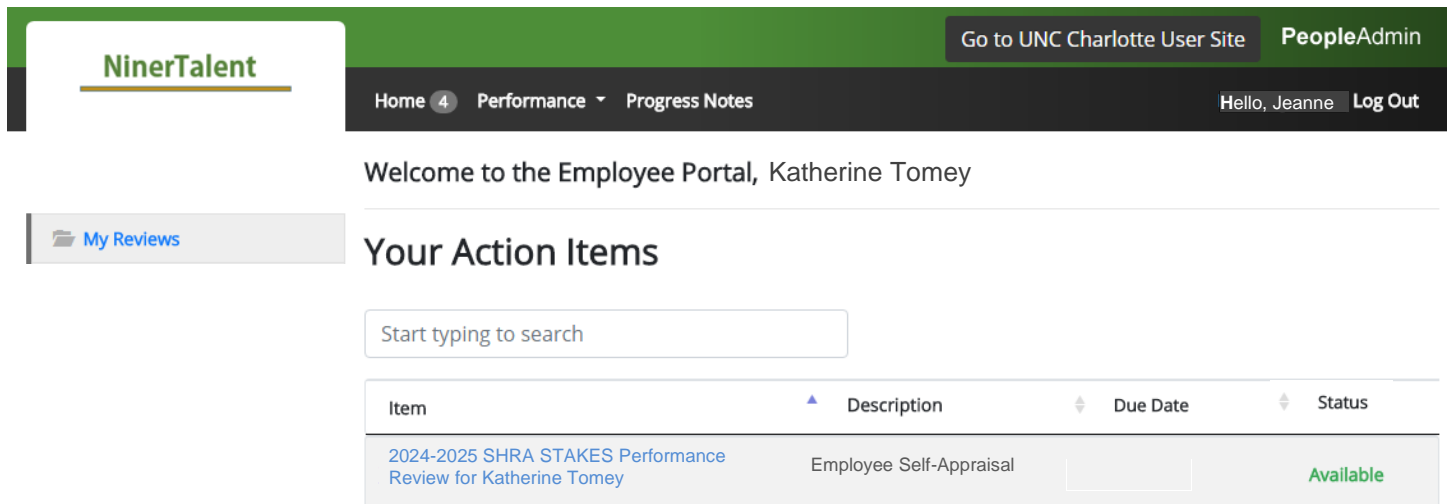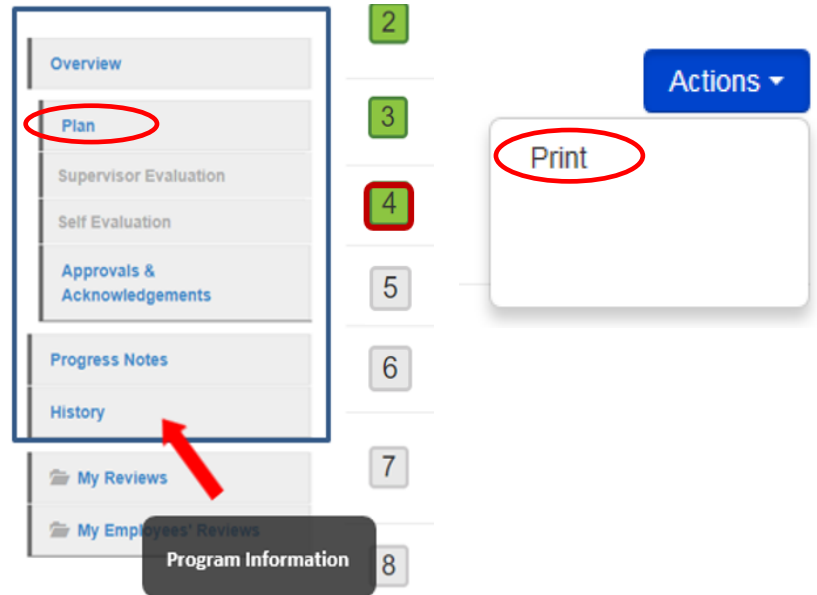
To return to the NinerTalent site, click the 'Go to UNC Charlotte User Site' button in the top right hand corner.
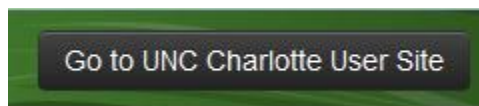
SHRA Off-Cycle Reviews

Off-cycle reviews are any documented performance reviews that are not the annual appraisal/evaluation. These reviews are to help keep you informed of how you are doing in terms of performance throughout the cycle by letting you know if you are meeting or not meeting expectations. It is also a time for you to get clarification and guidance on any performance expectations set forth in your performance plan at the beginning of the cycle.

To acknowledge an Off-Cycle Review, log into NinerTalent (http://jobs.charlotte.edu/hr) using your Ninernet credentials:

Once logged in, click the ellipsis '**...**' in the top 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. (Remember, the self-appraisal should not be started until March (end of cycle)).

To complete the off-cycle review action, select the linked item that corresponds with **'Employee Acknowledges Off-Cycle Review.'**

Once **'Employee Acknowledges Off-Cycle Review'** is selected, the following screen will appear.

Plan

Actions ▾

Select "Acknowledge" to indicate that you and your supervisor have discussed your performance progress up to this point in the evaluation cycle.

Appraisal Criteria

Date

2017-04-19

Review Type

Other

Rating

Meeting Expectations

Comments

Keep up the good work.

When you have finished going over your off-cycle review, type in any comments as necessary in the 'Comments' box and click the **'Acknowledge'** or **'Dispute'** button at the bottom of the page. By clicking either button, you are indicating that you have reviewed and understand the information inputted in the off-cycle review. Either action will bring this action to a close.

Comment

Enter comments here, as desired and/or necessary

↩ Dispute   ↩ Acknowledge

Note: You may request an employee-requested review from your supervisor once a year if you have not had a documented review (annual appraisal or off-cycle review/talent conversation) in the last 60 days.

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.

NinerTalent STAKES Cycle
Annual Timeline

TALENT CONVERSATION #1
March-April
Discuss Performance Plan for upcoming cycle
Conduct Annual Performance Appraisal
Schedule three follow-up talent conversations
Qtr. Review – Probationary Employees (required)

CALIBRATION SESSIONS
January - March
Leadership teams should hold calibration sessions to ensure consistent performance ratings & goal standards

Employee Self-Appraisal
Opens March 1
Due March 31

Annual Appraisals & Performance Plan Plan Due
May 15

TALENT CONVERSATION #4
December-January
Conduct nine-month follow-up to discuss goals, assess progress and resources, and, if needed, clarify or redefine expectations for remainder of cycle.
Qtr. Review – Probationary Employees (required)

TALENT CONVERSATION #2
June-July
Conduct three-month follow-up to discuss goals, assess progress and resources, and, if needed, clarify or redefine expectations for remainder of cycle
Qtr. Review – Probationary Employees (required)

Interim Appraisal Completed by
October 31

TALENT CONVERSATION #3
September-October
Conduct six-month follow-up** to discuss goals, assess progress and resources, and, if needed, clarify or redefine expectations for remainder of cycle
Qtr. Review – Probationary Employees (required)

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

- Quarterly check-in for July

- Interim review in October **(required if you 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

SHRA Annual Appraisal Process Steps

Performance Appraisal

Employee Completes Self-Appraisal → Supervisor Completes Appraisal → Next Level Supervisor/Mgr. Approves Appraisal → Employee Acknowledges Appraisal
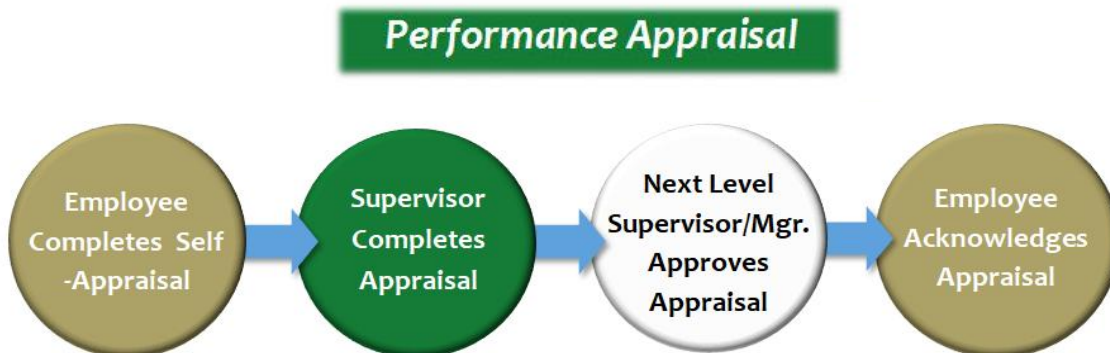
*Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your self-appraisal

Employee Completes Self-Appraisal (or Self Evaluation)
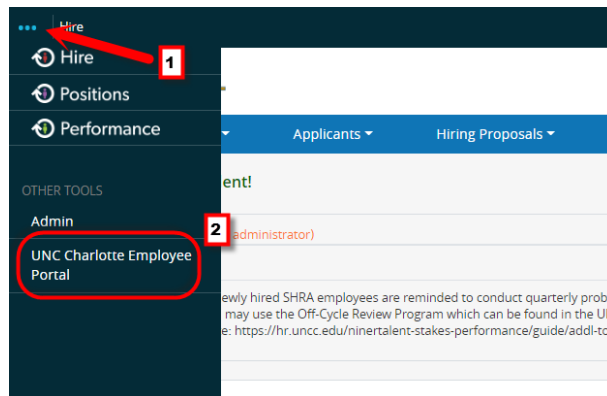
(Video available)

During the last month of the annual evaluation period, March, you will be prompted by a system-generated email message and/or your supervisor to begin the Employee Self-Appraisal (also referred to as the Self Evaluation).

To begin the Self-Appraisal, log into NinerTalent (http://jobs.charlotte.edu/hr) using your NinerNet credentials:
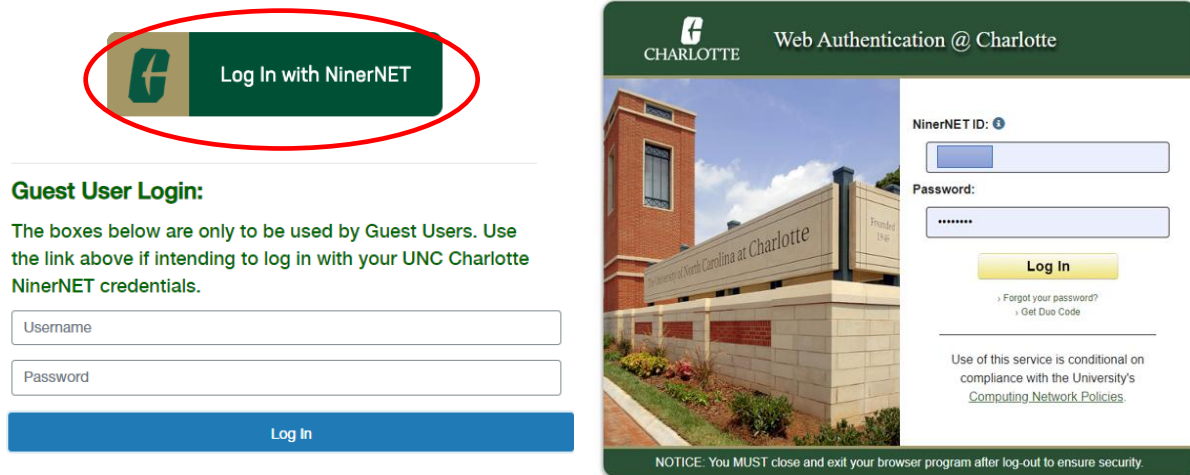
Once logged in, click the ellipsis **'…'** in the top left hand corner to initiate the dropdown and click **'UNC Charlotte Employee Portal.'**

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 Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To create an Employee Self-Appraisal, select the description title that reads **'Employee Self-Appraisal**, or click the blue **'View'** button corresponding to the appropriate process step.

Once selected, the "Employee Self-Appraisal" or Self Evaluation will appear. Note: There are five (4) tab sections that make up the Self Evaluation.

The first tab section is the 'Personal Self-Assessment.' You will see information on the purpose of the evaluation process then four questions total regarding your performance in the past cycle and your goals for the future. These questions were selected specifically to help you put in your own words how you feel you performed in this cycle and what you would like to achieve for the upcoming cycle.

| Personal Self-Assessment | Career Development Plan | Overall Performance | Attachments |

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

The purpose of the Self-appraisal is to provide an honest reflection of your performance over the past year and start a conversation with your supervisor.

This reflection process is intended to:

- Highlight what you did well and what could have gone better,
- Consider obstacles that prevented you from performing as well as you wished,
- Identify priorities and goals you would like to focus on in the coming year, and
- Think about what support you will need to achieve those goals.

Personal Self-Assessment for Previous Year

Please answer the questions in this section.
**Do not click "Remove Entry". **

* What do you think you did well this year? What are you the most proud of?

* What do you feel you could have done better? Did you encounter obstacles that prevented you from doing as well as you had hoped?

☐ Remove Entry?

Personal Self-Assessment for Upcoming Year

Please answer the questions in this section.
Do not click "Remove Entry".

* What are your priorities for the upcoming year?

* What personal or professional goals do you want to achieve this year? What support do you need to achieve those goals?

☐ Remove Entry?

When you reach the bottom of the page and have completed the 'Personal Self-Assessment,' 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.
Once you have completed the personal self-assessment, select **'Next'** to go to the Career Development Plan tab. Career development activities are not rated, but you have the option to add comments.

☑ Save Draft   Next ➤

| Introduction | Personal Self-Assessment | Career Development Plan | Overall Performance | Attachments 📄 |

Career Development Activities

Please add any comments regarding the professional development activities you engaged in this year.

Career Development Activity:

on work policies, standards and expectations for the unit. Organizational units include application development and management, database management, enterprise imaging, workflow and security and access privileges.

The next tab section indicates Overall Performance Comments where you can enter any other comments you had concerning your performance in this cycle.

If you would like to add any attachments before completing the appraisal, first click **'Save Draft'** and then go to the **'Attachments'** link and upload that information.

Note: Attachments must be in PDF format.

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.'
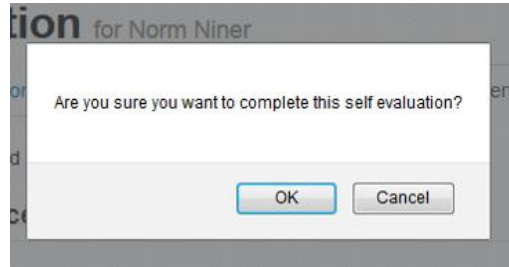
Once you have marked your Employee Self Evaluation as complete, the following will appear at the top of your screen if you have completed all required fields.

The Self Evaluation has been marked as complete.

If you would like to Print your Self Evaluation you can do so by clicking the blue **'Action'** button at the top of the page and selecting **'Print.'**

Self Evaluation
Workflow and Schedule

Actions ▾
Print

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
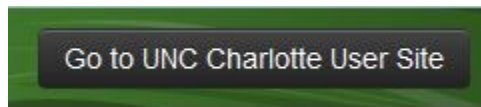
Employee Acknowledges Appraisal (or Evaluation)

(Video available)

To acknowledge your SHRA Annual Performance Appraisal, log into NinerTalent (http://jobs.charlotte.edu/hr) using your NinerNet credentials:
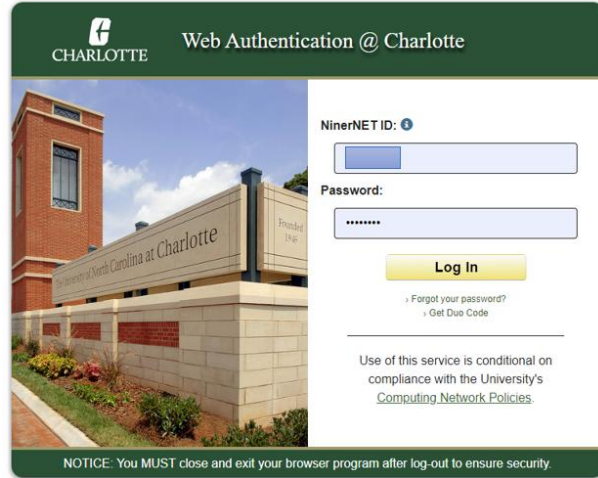
Once logged in, click the ellipsis '**…**' in the top left hand corner to initiate the dropdown and click '**UNC Charlotte Employee Portal.**'

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 Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To review your supervisor's evaluation of your performance, select an item link that corresponds with the action '**Employee Acknowledges Appraisal.**'

When you choose 'Employee Acknowledges Appraisal' the following screen will appear. You will see your overall performance rating at the top right of the screen. (This rating is valid in all instances **EXCEPT** if you have a rating of "Exceeding Expectations" and have a disciplinary action in the current cycle that was not accurately reflected in your appraisal.)

Click the **'Actions'** button and print your appraisal either to a pdf document or on paper so you have a record of the documentation. **DO NOT** Acknowledge or Dispute your plan yet.

When you have completed a review of your evaluation information, type in any comments as necessary in the 'Comments' box at the end of the page and click the **'Acknowledge'** or **'Dispute'** button.

Acknowledge or Dispute

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

Once you have acknowledged your performance appraisal, the following screen will appear. **If you 'Dispute' the appraisal you will see the Employee Acknowledgment step will be outlined in red as seen below.**

Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal. They will only be aware of this if you notify them, or if they are looking at the performance dashboard like the one below.

Returning to the Performance Dashboard

When reviewing your Overview screen, you can click on the blue text to view the detailed information provided.
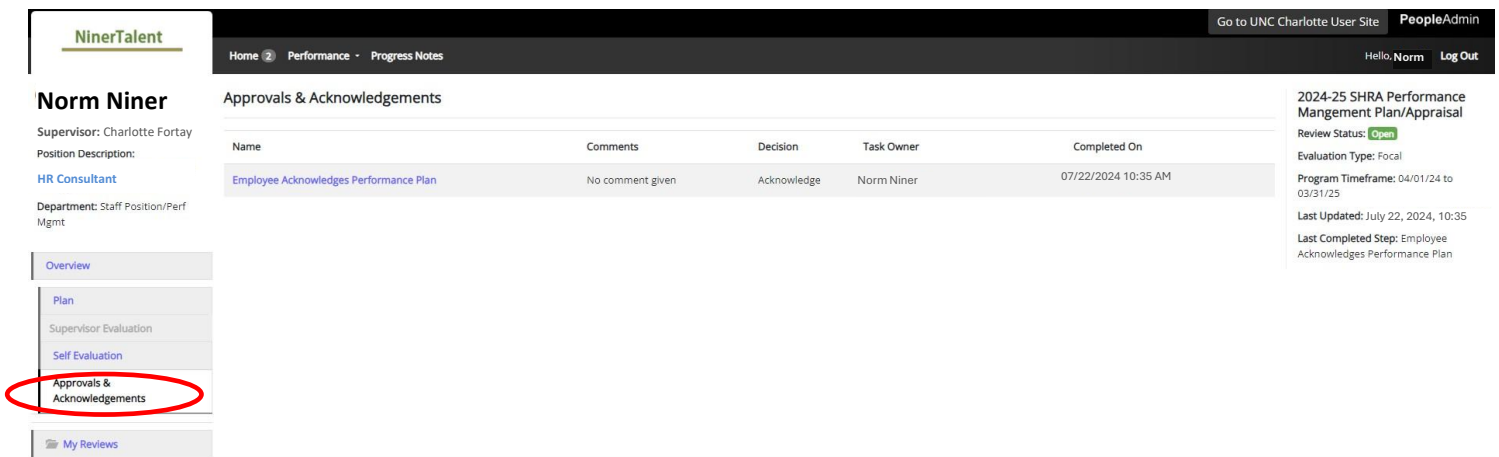
You can go back to review your appraisal by clicking the **'Supervisor Evaluation'** link on the left navigation pane on the right. You can print your evaluation by clicking the blue **'Actions'** button in the top right corner of the page to reveal the **'Print'** option.

Note: **Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal.** They will only be aware of this if you notify them yourself, or if they are looking at the performance dashboard like the one depicted on the previous page.

You can access the approval notes from your Next Level Supervisor and your own "Acknowledgments" by clicking the **"Approvals & Acknowledgements"** link under the **"Overview"** navigation pane.

Congratulations!

You have successfully completed all required process steps associated with the performance evaluation process.

To return to the NinerTalent site, click the **'Go to UNC Charlotte User Site'** button in the top right hand corner.