Creating a Performance Plan *(video available)*

From the ‘Your Action Items’ Page:

1) To begin the performance process, the supervisor will select “Performance Plan Creation” or the blue “View” button corresponding to the appropriate process step.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-2019 Off-Cycle Reviews for Katherine Tomey</td>
<td>Off Cycle Review</td>
</tr>
<tr>
<td>2018-2019 Off-Cycle Reviews for Tawander Barr</td>
<td>Off Cycle Review</td>
</tr>
<tr>
<td>2018-2019 SHRA STAKES Review for Katherine Tomey</td>
<td>Performance Plan Creation</td>
</tr>
<tr>
<td>2018-2019 SHRA STAKES Review for Tawander Barr</td>
<td>Performance Plan Creation</td>
</tr>
</tbody>
</table>

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

**Select “Save Draft” or “Next” at the bottom of each page to save the plan and/or move to the next tab. Selecting “Next” will save the plan as a draft in case you are logged out.**
1. The first tab is titled “Institutional Goals”. The institutional goals should encompass all aspects of an employee’s work and conduct. You will need to provide a percentage weight of no less than 5% for each goal, and all 5 goals (six goals if supervisor) should equal 50%

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

Comments are not required in this section, but are suggested if there are specific standards of performance which are not documented in a policy or referenced in other departmental procedures or employee documentation. A link to the “Institutional Goals” document is available on this tab for your convenience.

Each institutional goal has supporting information to help you relate the concept to the position description. **Click here for instructions on setting institutional goals.**

2. The second tab of the performance plan is the “Individual Goals” tab. Each employee should have three to five individual goals. 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.

These goals should focus on factors such as key results, outcomes, and/or deliverables for the current performance cycle. Each individual goal should have a percentage weight of no less than 5%, and should equal 50%.
**Individual Goals**

<table>
<thead>
<tr>
<th>* Goal Name</th>
<th>SHRA Performance Training</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>* Goal Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roll out training and information sessions for all those affected 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….</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>* Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
</tr>
</tbody>
</table>

Click here for instructions on writing the **individual goals** “Goal Description”.

3. The third tab, entitled “Career Development Plan”, provides an opportunity to set some professional development goals for your employee. Each employee should have at least one career development goal for each performance cycle.

**Career Development Activities**

The performance plan defines activities for employee growth or defines corrective actions for performance deficiencies. Development goals include training programs, committee work, conference presentations or attendance, or related activities that maintain, develop or broaden employee skills relevant to their current position and/or their career path or to their role in service to the work unit or the broader University community.

Development activities are not rated at the end of the review period, but will be reviewed for progress and future planning.

Click here for instructions on creating a **career development plan**.

4. The fourth tab, entitled “Evaluation Method(s)”, is where you will choose the Evaluation Method(s) you intend to use to conduct your assessment of your employee’s performance. You may choose as many evaluation methods as deemed appropriate, or necessary.
5. Once you have entered all of the goals, select “Complete” at the bottom of the page. You will be asked to confirm that you do want to complete the plan. Once you have selected “OK”, the plan will be sent to the Next Level Supervisor for approval.

***If you have not completed all of the required fields, you will receive an error message like the one below:

EXPERTISE requires at least 1 entries, ACCOUNTABILITY requires at least 1 entries, CUSTOMER-ORIENTED requires at least 1 entries, TEAM-ORIENTED requires at least 1 entries, COMPLIANCE & INTEGRITY requires at least 1 entries, LEADERSHIP (for managers/supervisors) requires at least 1 entries, Individual Goals requires at least 3 entries.

You can print, revise, or copy the employee’s performance plan at any time prior to the start of the appraisal.
Next-Level Approval of Performance Plan *(video available)*

Once the performance plan has been completed, it must be approved by the Next-level supervisor. As a Next-level supervisor, you will receive an email that you have an action to complete.

The first screen you will see when you reach the Employee Portal is "Your Action Items" – “Next Level Performance Plan Approval”. Review by clicking the “Next Level...” descriptions or the blue “View” button. Once you have reviewed the plan you should click one of the three buttons below.

Once the Next level supervisor approves the plan, it will be forwarded to the employee for acknowledgment.

Employee Acknowledgement of Performance Plan *(video available)*

The employee will receive a message that their performance plan is ready for acknowledgement. They will need to log into NinerTalent (using your Ninernet credentials) by going to https://jobs.uncc.edu/hr to do this.

*For more instructions on this topic go to the NinerTalent (HRMS) Employee Guide*

Completing the Performance Appraisal Process

Employee Self-Appraisal *(video available)*

The employee will receive an email in March indicating that their Self-Appraisal is ready.

Once the personal self-appraisal is complete, the supervisor will be notified that they can begin the Supervisor Appraisal. The Self-Appraisal should be reviewed prior to drafting the Supervisor Appraisal.

*For more instructions on this topic go to the NinerTalent (HRMS) Employee Guide*