Completing the Performance Plan Process

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.

![Image of Your Action Items page with highlighted row and button]

Once selected, the Performance Plan will appear. Please note the tabs are across the top of the plan.

![Image of SHRA Annual Performance Review (2017-2018) with highlighted tab and button]

1. The first tab is titled “Schedule and Components”, you will find reference information such as the approvers workflow, the schedule, the components of the system, and the rating scale.

   **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.**
2. The second 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%.

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 in 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.**

3. The third 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 employee’s work product – these are big ticket items to be completed in this performance cycle.

![Individual Goals](image)

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

4. The fourth 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.

Click here for instructions on creating a career development plan.

5. The fifth 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.

6. 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:

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.

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