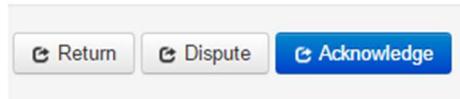The first screen you will see when you reach the Employee Portal is **"Your Action Items"** – "Next Level Performance Plan Approval". Review by clicking the **"Next Level..."** descriptions or the blue **"View"** button. Once you have reviewed the plan you should click one of the three buttons below.

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

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

Once the personal self-assessment is complete, select "Next" to go to the Career Development Plan tab. Career development activities are not rated, but there is an option to add comments.

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

Supervisor Appraisal

When the appraisal period opens, you will receive an email to login and complete the employee's evaluation. Once you login, look at the **"Your Action Items"** screen and select **"Supervisor Appraisal"** or **"View"** for the appropriate employee.

1) This will take you to the evaluation screen. Please take note of the **"Rating Scale"** information under the **Schedule & Components tab** and the instructions at the top of each subsequent tab prior to entering your ratings. The instructions on these screens are in accordance with the new UNC system policy and scoring guidelines.

Note: Any rating of "Not Meeting Expectations" requires a reason and suggestions for improvement (or performance improvement plan). And, any "Exceeding Expectations" ratings require specific examples during the cycle to illustrate how the employee exceeded the expectations for that particular goal in this performance cycle.

Overall Performance Comments

Please enter comments regarding the employee's overall performance and select "Complete" when you are finished with your ev employee's overall rating is calculated as a weighted average of the rating on each goal.

* Overall Performance Comments

* Was there a formal disciplinary action initiated for this employee after April 1st, 2016?

If you answer "yes" to this question, your employee's overall score cannot be "Exceeding Expectations".

* Did you enter a rating of 'Not Meeting Expectations' on ANY goal (institutional or individual)?

If you answer "yes" to this question, your employee's overall score cannot be "Exceeding Expectations".

In the Overall Performance Comments section, you should summarize the employee's accomplishments or deficiencies during the cycle. You will also have to answer two additional questions regarding their overall performance with a "Yes" or "No":

1. Was there a formal disciplinary action initiated for the employee during the cycle
2. Did you enter a rating or "Not Meeting Expectations" on any goal (individual or institutional)?

2) When you are finished with the appraisal, select "Complete" and then "Ok" when the confirmation window appears. This will complete the appraisal and send it to the Next Level Supervisor for approval.

Next Level Supervisor (or Reviewer) Approval of SHRA Appraisal

When the "Supervisor Appraisal" has been completed, it will be sent to the Next Level Supervisor and they will be notified by email that it is time to approve the appraisal.

Once the appraisal has been approved, this will open up the "Supervisor/Employee Appraisal Discussion" step for the Supervisor to meet with the employee.

Supervisor/Employee Appraisal Review Meeting

The Supervisor will receive an email that the Next level supervisor has approved the appraisal and the supervisor may meet with the employee to discuss it. After meeting with the employee, the supervisor should confirm the meeting in NinerTalent by going into the corresponding action item and clicking the "Complete" button. This will send the appraisal to the employee for acknowledgement.

*Click here for instructions on completing an having an effective **appraisal review meeting**.*

Employee Acknowledgment of Appraisal

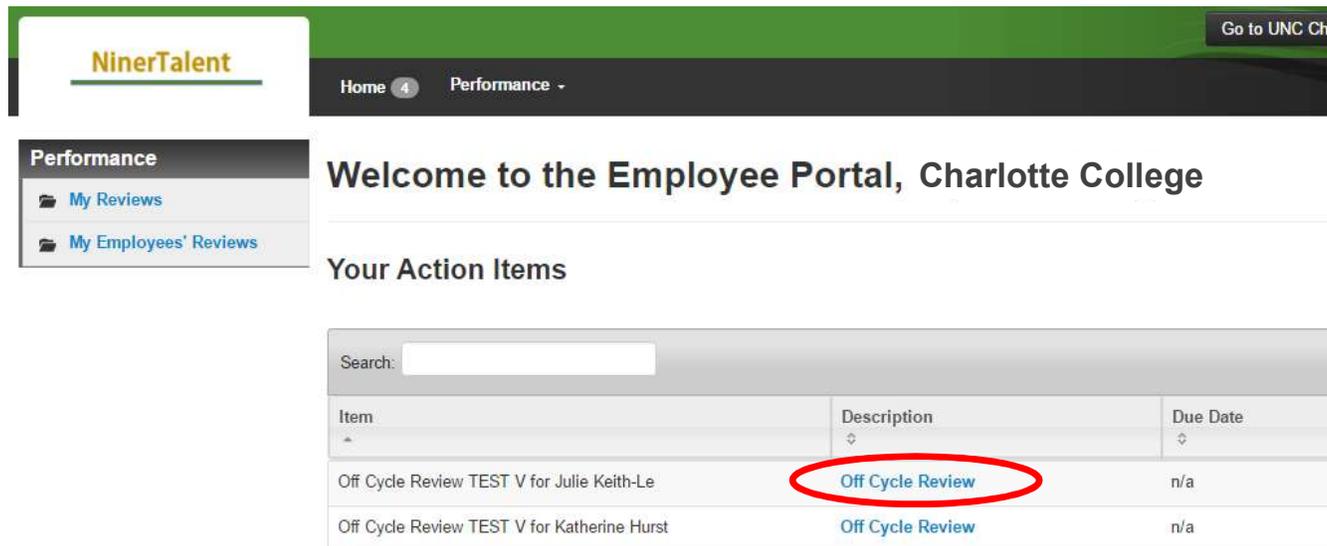The employee will receive an email that their appraisal needs acknowledgement.

This screen has instructions regarding grievance rights. If the employee wishes to file a grievance regarding an overall rating of "Not Meeting Expectations", they must contact the Office of Human Resources.

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

Completing an Off-cycle Review
(video available)

Keep your employee informed of how they are performing throughout the year with quarterly off-cycle reviews. This program will appear in your 'Action Items' box at the beginning of each cycle for each of your employees.

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

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