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Navigating NinerTalent Performance Module

NinerTalent is UNC Charlotte’s Human Resources Management System (HRMS) for Employees and Hiring Managers. The Performance module 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.uncc.edu/hr](http://jobs.uncc.edu/hr) using your NinerNet credentials:

Once logged in, click the ‘Go to UNC Charlotte Employee Portal’ link in the upper right hand corner of your page.

Note, you can access this link from any module and logged in as any user type.
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 description link, or click the blue ‘View’ button corresponding to the appropriate process step to access the action that needs to be completed.

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 it is reopened by a Human Resources administrator.

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 “Performance” menu 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 of the performance tasks that will or have occurred this cycle, the task owner, the date the task was 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 desire 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)
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.uncc.edu/hr) using your Ninernet credentials:
Once logged in, click the ‘Go to UNC Charlotte Employee Portal’ link in the upper right hand corner of your page.

Note, you can access this link from any module and logged in as any user type.

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 the action click the description title that reads ‘Employee Acknowledges Performance Plan’, or click the blue ‘View’ button corresponding to the appropriate process step.

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.

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 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 which will be used to assess your performance. However, ‘Dispute’ indicates that you disagree with some information contained in the plan.

If you choose to ‘Dispute’, please use the ‘Comments’ box to document your specific disagreement.
After you have entered your dispute, go back to this action item and choose ‘Acknowledge’ to complete the action.

Note: Choosing ‘Acknowledge’ brings the Performance plan review process to successful completion.

Once you have acknowledged your performance plan, the following screen will appear. 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 acknowledged, the following will appear in ‘Your Action Items’: Employee Self-Appraisal.

Note: This action item represents the first step of your annual evaluation and is not due to be started & completed until March of the following year. No further action is required at this time.

To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
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.uncc.edu/hr) using your Ninernet credentials:

![Login Screen](image)

Once logged in, click the ‘Go to UNC Charlotte Employee Portal’ link in the upper right hand corner of your page.

![Employee Portal](image)

Note, you can access this link from any module and logged in as any user type.
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 description title that reads ‘Employee Acknowledges Off-Cycle Review’, or click the blue ‘View’ button corresponding to the appropriate process step.

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

**Plan** for Norm Niner

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. However, choosing ‘Dispute’ indicates that you disagree with some information contained in the off-cycle review.

If you choose to ‘Dispute’ the off-cycle review, please use the ‘Comments’ field to document your specific disagreement then go back to this action item and choose ‘Acknowledge’ to complete the action.

Note: Choosing ‘Acknowledge’ brings the off-cycle review process to successful completion.

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.

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
Using Progress Notes

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 are not viewable by your supervisor. However, all documented items should be professional and performance-related.

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

Once logged in, click the ‘Go to UNC Charlotte Employee Portal’ link in the upper right hand corner of your page.

Note, you can access this link from any module and logged in as any user type.
Click the ‘My Review link’ and select the appropriate Review using the filters on the left hand side to narrow search results.

When you have located the specific program of interest, you may click the link associated with the program or the blue ‘View Review’ button.

Once selected, the following screen will appear. You may choose Progress Notes from the left hand menu.
Once selected, the following screen will appear. Enter all relevant information, add an attachment (if desired), and click ‘Save’. You may add another item, as necessary. Refer to the example below.

2017-2018 SHRA Annual Performance Review

| Evaluation Type: | Focal |
| Program Timeframe: | 03/01/15 to 02/29/16 |
| Co-reviewer: | N/A |
| Review Status: | Open |
| Last Updated: | June 26, 2015 11:23 |
| Last Completed Step: | Employee Acknowledges Performance Plan |

Progress Notes

Title (Optional) | Interim Review

* Note | Met with my supervisor on Wednesday, MM/DD/YY to discuss performance to date.

To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Annual Appraisal Process Steps

Employee Completes Self-Appraisal (or Self Evaluation)

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.uncc.edu/hr) using your NinerNet credentials:

Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your self-appraisal.
Once logged in, click the ‘Go to UNC Charlotte Employee Portal’ link in the upper right hand corner of your page.

Note: You may access this link from any module and while logged in as any user type

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 Self Evaluation will appear. Note: There are five (5) tab sections that make up the Self Evaluation.

The first tab section is an ‘Introduction’, which gives you information on the evaluation process including the Approver’s Workflow and Schedule.
The second tab section is the ‘Personal Self-Assessment’ tab, where you will answer four questions regarding your performance in the past cycle and your goals for the future. These fields are required and are designed for you to put in your own words how you feel you performed in this cycle and what you would like to achieve for the upcoming cycle.

**Self Evaluation** for Norm Niner

The self-appraisal is designed to provide you with an opportunity to participate in performance conversations. Once you have completed the self-appraisal, your supervisor will be notified to begin their appraisal.

Required fields are indicated with an asterisk (*).

**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.

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’ tab and upload that information.
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 screen will appear. If you would like to Print your Self Evaluation you can do so by clicking the blue ‘Action’ button and selecting ‘Print’.

To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Employee Acknowledges Appraisal (or Evaluation)

To acknowledge your SHRA Annual Performance Appraisal, log into NinerTalent (http://jobs.uncc.edu/hr) using your NinerNet credentials:

Once logged in, click the ‘Go to UNC Charlotte Employee Portal’ link in the upper right hand corner of your page.

Note, you can access this link from any module and logged in as any user type.
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 the description title that reads ‘Employee Acknowledges Appraisal’, or click the blue ‘View’ button corresponding to the appropriate process step.

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 or any rating of Not Meeting Expectations”)

In the blue box there is information about the acknowledgement process as well as your grievance rights with regards to your evaluation.
When you have completed a review of your evaluation information, type in any comments as necessary in the ‘Comments’ box and click the ‘Acknowledge’ or ‘Dispute’ button at the bottom of the page. Choosing either button, indicates that you have reviewed your evaluation and the documented work performance assessment has been discussed with you. ‘Dispute’ also indicates that you disagree with some information contained in the evaluation.

If you choose to ‘Dispute’ your evaluation, please use the ‘Comments’ field as indicated to document your specific disagreement then go back to this action item and choose ‘Acknowledge’ to complete the action.

Note: Choosing ‘Acknowledge’ brings the Evaluation review process to successful completion.

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
abedef

Was there a formal disciplinary action initiated for this employee after April 1st, 2017?
No

Did you enter a rating of ‘Not Meeting Expectations’ on ANY goal (institutional or individual)?
No

Does your employee’s “Score in Progress” reflect that he/she is “Exceeding Expectations” even though you answered "Yes" to one or both of the questions above?  
No, this does not apply to my employee
Once you have acknowledged your evaluation, the following screen will appear. On this screen, you may review your Plan, your Approvals & Acknowledgements (including any Disputes), and add Progress Notes.

If you would like to print your appraisal you can click on the ‘Approvals & Acknowledgements’ tile or link on the left navigation pane. On the next screen, choose ‘Employee Acknowledges Appraisal’ and print.
Congratulations!

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

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