Contents

Navigating NinerTalent Performance Module ................................................................. 3
  Logging in and Accessing the Employee Portal ......................................................... 3
  Your Action Items ........................................................................................................ 4
  Searching and Dashboard ............................................................................................ 5

Using Progress Notes ...................................................................................................... 7

EHRA Performance Management .................................................................................... 9
  EHRA Annual Review Process Steps ........................................................................ 9
  Employee Completes Self-Appraisal (or Self Evaluation) ........................................ 9
  Employee Acknowledges EHRA Appraisal ............................................................... 10
    Acknowledge or Dispute ......................................................................................... 12
  Returning to the Performance Dashboard ............................................................... 12

SHRA Performance Management .................................................................................... 14

Performance Plan Process Steps .................................................................................. 14
  Employee Acknowledges SHRA Performance Plan ................................................. 14
    Acknowledge or Dispute ......................................................................................... 17
  Returning to the Performance Dashboard ............................................................... 17

SHRA Off-Cycle Reviews .............................................................................................. 19

SHRA Annual Appraisal Process Steps ....................................................................... 22
  Employee Completes Self-Appraisal (or Self Evaluation) ....................................... 22
  Employee Acknowledges Appraisal (or Evaluation) ............................................. 27
    Acknowledge or Dispute ......................................................................................... 29
  Returning to the Performance Dashboard ............................................................... 29
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, 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 ‘...’ in the 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 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 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 of the performance tasks that will or have occurred this cycle, the task owner, the date the tasked 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)
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 are not viewable 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.uncc.edu/hr](http://jobs.uncc.edu/hr)) using your NinerNet credentials:

Once logged in, click the ‘...’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.
To document a progress note for yourself or any of your employees 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’.

Click Share button to share with supervisor

Choose Your Name

Progress Note (Only Choice)

Descriptive Title + Date (to help locating information easy)

Relevant Comments regarding performance

Click to add attachment

Create
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**

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*If required by your leadership, ensure your appraisal is approved prior to clicking the complete button in NinerTalent.

**Employee Completes Self-Appraisal (or Self Evaluation)**

*(Video available)*

The Employee Self-Appraisal is an optional step determined by you and your supervisor. At the end of your annual evaluation period, May or June, it is recommended that you complete the employee self-appraisal even if your supervisor does not require that this be done.

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.

The self-appraisal documents can be found on the STAKES Performance website under EHRA Tools & Resources. One form is structure to match the appraisal form goals and the other is a free-form document that will allow you to document your accomplishments more easily without categories.

Your supervisor may attach your self-appraisal to your appraisal document in the NinerTalent system.
Employee Acknowledges EHRA Appraisal

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

Once logged in, click the ‘…’ in the 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 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 properly 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.

![Comment field](image)

**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.

![Task status](image)

**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.

![Performance Dashboard](image)

**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 performance evaluation process.

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

Once logged in, click the ‘...’ in the 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. ‘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.
Acknowledging or Disputing

Choosing ‘Acknowledgment’ 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 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 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. Please do not complete this action early if it appear in your queue prior to March 1.

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

Once logged in, click the ‘…’ in the 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**

- 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 or Acknowledge button](image)

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
SHRA Annual Appraisal Process Steps

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.uncc.edu/hr) using your NinerNet credentials:
Once logged in, click the ‘…’ in the 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.

**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.

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

Once you select “Complete”, your self-appraisal will be sent to your supervisor. Please ensure that you are satisfied with your responses prior to selecting “Complete”. **
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.

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’.

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)

*(Video available)*

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

Once logged in, click the ‘...' in the 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 item link that 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 properly 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 may review your Plan, your Approvals & Acknowledgements, and add 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 performance evaluation process.

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