Table of Contents

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

Performance Management .................................................................................................................. 6
  Performance Plan Process Steps ...................................................................................................... 6
  Create SHRA Performance Plan ..................................................................................................... 6
  Copy Performance Plan to Other Like Positions .............................................................................. 13
  Next-Level Supervisor Approves Performance Plan ...................................................................... 18

Completing the Supervisor/Employee Performance Plan Meeting .................................................... 21
  Revise Performance Plan .................................................................................................................. 22

Off-Cycle Reviews ............................................................................................................................. 23
  Scenario 1. Employee’s First Off-Cycle Review in Current Performance Cycle ......................... 25
  Scenario 2. Employee’s Second or Subsequent Off-Cycle Review in Current Performance Cycle .... 27

Using Progress Notes .......................................................................................................................... 30

Annual Review Process Steps ............................................................................................................. 33
  Supervisor Completes Employee Appraisal ..................................................................................... 33
  Next-Level Supervisor Approves Appraisal .................................................................................... 40
  Supervisor/Employee Appraisal Discussion ................................................................................... 44
  Revise Employee Appraisal .............................................................................................................. 47
Navigating NinerTalent Performance Module

NinerTalent is UNC Charlotte’s Human Resources Management System (HRMS) for Employees and Hiring Managers. The type of NinerTalent access you have is determined by your position and may be requested through your supervisor or the Business Officer in your college/division by filling out the NinerTalent User Group Request form. For information on getting started in NinerTalent please review the User Guides on the NinerTalent website.

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) 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.
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, it will automatically show you the current performance cycle programs which are currently open. Use the filters in the left navigation bar to find the desired information. You can use the ‘Open/Completed’ filter to see all performance actions you have made in the NinerTalent system for your current employees by selecting ‘All’.

Select the desired highlighted program you want to review or click the blue ‘View Review’ button to open the overview page.
You can view any completed or open item from the “Overview” screen at any time. For example, to begin or view the Supervisor Evaluation (also called a Supervisor Appraisal), click the ‘Supervisor Evaluation’ tile or link in the left navigation pane.

You can also find your current job description by clicking your job title, under the employee’s 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

Create SHRA Performance Plan

To create 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 ‘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, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To create a new, and/or modify an existing, performance plan, select the description title that reads ‘Performance Plan Creation’, or click the blue ‘View’ button corresponding to the appropriate process step.

Note! Prior to the beginning of the new performance cycle, and you drafting the new performance plan, you should sit down with your employee to discuss the department or unit’s strategic goals for the cycle. You and your employee may be able to collaborate on what individual goals and career development goals should be included in the plan.
Once selected, the Performance Plan will appear. There are **five (5) tab sections** across the top of the Plan.

The **first tab** section is titled “**Schedule and Components**”. You will find reference information such as the approver’s workflow, the schedule, the components of the system, and the rating scale.

The **second tab** section is titled “**Institutional Goals**”. This tab is where you will enter a percentage weight for each corresponding institutional goals and any specific standards of performance if desired. You will need to provide a percentage weight of no less than 5% for each goal, and all 5 goals (6 goals if supervisor) must add up to 50%.

If you’re employee is not a supervisor – be sure to input “0” as the weight for the Supervision goal.
When you reach the bottom of the page and have completed/edited each institutional goal, you may click “Save Draft” or “Next”. Choosing the ‘Save Draft’ button will allow you to come back and complete the performance plan at a later point in time. Choosing the ‘Next’ button will move you forward to the next tab section. (Note: The ‘Next’ button will enable auto save for the work just completed).

The **third tab** section is titled “**Individual Goals**”. This is where you will enter three to five individual goals and their corresponding percentage weights. You will need to provide a percentage weight of no less than 5% for each goal, and all the individual goals must add up to 50%.

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.

You may add new individual goals, remove existing goals, or edit/replace existing goals, as necessary and/or appropriate. Please label each goal that is added. The ‘Add Entry’ button should be selected to open a new entry field.

---

**Plan for Norm Niner**

The supervisor and employee create the performance plan together: setting goals for the coming year.

**Individual Goals**

- **Goal Name**: SHRA Performance Training
- **Goal Description**: 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

- **Weight**: 15%

- **Remove Entry?**
The fourth tab section is the Career Development Plan. On this tab, you will enter/edit any Career Development activities associated with the specific employee. Career Development activities may include such items as: training workshops, technical skills training, professional certifications and/or conferences, etc. Please number each activity that is added.

Each employee should have at least one career development goal or activity each performance cycle. (Note: Career Development activities are strongly encouraged as a ‘best practice’ and should be updated on an annual basis.)

Plan for Norm Niner

The supervisor and employee create the performance plan together, setting goals for the coming year.

Required fields are indicated with an asterisk (*).

Career Development Activities

The career development 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.

* Career Development Activity

1. Training
2. Re-certification/License renewal
3. Cross training

Remove Entry?
The fifth tab section is **Evaluation Methods**. On this tab, you will choose the Evaluation Method(s) you intend to use to conduct your assessment of the employee’s performance. You may choose as many evaluation methods as deemed appropriate, or necessary. (*Note:* If you choose ‘Employee Self-Report’, please communicate to your employee what this expectation entails, including the schedule (weekly, monthly, quarterly, etc.) of these reports or check-ins and the expected content.)

**Plan** for Norm Niner

The supervisor and employee create the performance plan together, setting goals for the coming year.

<table>
<thead>
<tr>
<th>Schedule and Components</th>
<th>Institutional Goals</th>
<th>Individual Goals</th>
<th>Career Development Plan</th>
<th>Evaluation Method(s)</th>
</tr>
</thead>
</table>

**Evaluation Method(s)**

The boxes below indicate the types of evaluation method(s) you will utilize to appraise the employee’s performance. Select all that apply.

- [ ] Supervisor Observation
- [x] Employee Self-Report
- [ ] Spot Checks
- [ ] Project Results
- [ ] Work Samples/Statistics
- [ ] Peer Feedback
- [ ] Third Party Feedback
- [ ] Remove Entry?

**Note:** If you still need to finalize some elements in the document prior to sending it to the Next-Level Supervisor for review, choose ‘Save Draft’.

If you choose ‘Complete’ it will go to the Next-Level Supervisor for review. At this point, the Next-level supervisor may return the plan back to you for revising or approve it so you can move forward with the performance plan meeting and employee acknowledgement of the performance plan process.
You can copy the completed performance plan to your other employees, who are in like positions, by clicking the ‘Actions’ button. This will begin the copying process.

If you would like to copy a performance plan to like positions go to the next section of this guide titled “Copy Performance Plan to Other Like Positions”. If you have already clicked the copy button as depicted below, you should start from this point in the directions below.
Copy Performance Plan to Other Like Positions

If you have like positions that will have the same or similar performance plans, you can use these instructions to copy an already completed performance plan (which you created for one employee) to your other direct reports.

To copy 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’. Once here, click ‘My Employee Reviews’ on the left navigation or via the ‘Performance’ dropdown.

The following screen will appear for you to locate the specific employee and associated program from which you want to copy the Performance Plan. Click the associated link or the blue ‘View Review’ button.

You can view any completed or open item from the ‘Overview’ screen at any time. In this case, to begin copying this particular employee’s Performance Plan, click on the ‘Plan’ tile or the link on the left navigation.
The Plan for the employee will open. Click the ‘Actions’ button and choose ‘Copy’ to begin copying the Plan.

The following screen will appear. First, deselected the items indicated with the red arrows below. Next deselect any other components you do not want to be copied (to include Individual Goals, Career Development Activities, and Evaluation Methods or any of the institutional goals listed) then click the ‘Continue’ button.
When you arrive at the ‘Select Employees’ tab, select the employees under your supervision whom you want this Performance Plan to copy to by putting a check mark in the box next to their name.

**Copy Objective Plan**

Select Objectives  Select Employees  Done

Which employees should receive the objective plan?

2017-2018 SHRA Annual Performance Review, who do not already have an objective plan.

<table>
<thead>
<tr>
<th>Select All</th>
<th>Title</th>
<th>Department</th>
<th>Manager Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkmark</td>
<td>Goldie Dust</td>
<td>Human Resources Specialist</td>
<td>Human Resources</td>
</tr>
</tbody>
</table>

Copy Plan to selected employees and complete the associated Step. If not checked, Plan will remain in draft status.

Click the ‘Copy Objective Plan’ button to proceed.

The objective plan was successfully copied to 1 employees.

View Norm Niner’s Objective Plan or select an employee below to view their objective plan.

<table>
<thead>
<tr>
<th>Goldie Dust</th>
<th>Title</th>
<th>Department</th>
<th>Manager Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Human Resources Specialist</td>
<td>Human Resources</td>
<td>Charlotte College</td>
</tr>
</tbody>
</table>

You should review the copied performance plans before sending it to the Next-Level Supervisor to ensure that all elements are copied over correctly. (Sometimes NinerTalent system updates can cause glitches in the system that may effect the copy function, leaving some selected copy items to be left blank.)

For this reason it is **not recommended** that you select/check the box that reads “Copy Plan to selected employees and complete the associated Step…”

The performance plan has now been successfully copied to the employees you selected. Click the employee’s name to review the plan and make any necessary edits, and finalize. You can also find the plans you copied in your Actions Items box. They will be labeled “Performance Plan Creation” until you click the ‘Complete’ button.
When you are satisfied with the plan click the ‘Complete’ button on the ‘Evaluation Methods’ tab. This will send the plan to the Next-Level Supervisor for review.
Next-Level Supervisor Approves Performance Plan

Once the Supervisor has completed the Performance Plan, this information will route immediately to the Next-Level Supervisor for consideration/comments.

To review and approve 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 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, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To review the Performance Plan drafted by the supervisor, select the description title that reads ‘Next Level Supervisor Approves Performance Plan’, or click the blue ‘View’ button corresponding to the appropriate process step.

Review the Performance Plan for accuracy and consistency. (Note: The Next-Level Supervisor should ensure that there is consistency in goals across similar positions and that the individual goals directly or indirectly relate to the unit’s strategic goals in the current cycle.)

When you get to the bottom of the page you can choose to ‘Approve’ the Plan or ‘Return’ it to the supervisor for revision. If it is necessary to return the Performance Plan back to the supervisor, you must enter your instructions into the comments box at the bottom of the form prior to returning it.
If you attempt to ‘Return’ the action without writing a comment in the box, you will see the following:

Once you have received a Performance Plan that you agree with you will ‘Approve’ the action it will go back to the supervisor to prepare for their Performance Plan Meeting with their employee.

To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Completing the Supervisor/Employee Performance Plan Meeting

Once the Next-Level Supervisor has ‘Approved’ the Performance Plan for your employee, you will see ‘Supervisor/Employee Performance Plan Meeting’ in ‘Your Action Items’. This indicates that it is time to schedule/conduct a Supervisor/Employee Performance Plan Discussion. During this meeting, you and your employee will discuss the expectations contained within the performance plan, as well as, the method(s) of evaluation you intend to use to conduct your assessment of work performance.

This process step should be marked as ‘Complete’ only after the Supervisor/Employee Performance Plan Discussion has been conducted. (Note: When you select the ‘Complete’ button associated with this process step, the Performance Plan is routed immediately to the employee for his/her review and acknowledgement.)
Once you have acknowledged that you have conducted the Performance Plan Meeting with your employee, by clicking the ‘Complete’ button, the following screen will appear. On this screen, you may review your employee’s Plan, the Approvals & Acknowledgements, and add Progress Notes if you choose.

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

**Revise Performance Plan**

If you need to update or correct information in your employee’s Performance Plan, but it has already been approved by the Next-Level Supervisor, contact Paulette Russell at P.Douglas@uncc.edu or Ext. 70660 (or the Employee Relations Office at Ext. 70662) to request that the action be put back in your queue for revision. You will see the ‘Performance Plan Creation’ appear back in your ‘Action Items’ when you enter the employee portal.

Once, it has been put back in your queue use the “Create SHRA Performance Plan” process steps to revise and complete the performance plan.

Once you finish revising the plan, your changes will go back to the Next-Level Supervisor for approval, then back to you to meet with your employee about the changes made, and last to the employee to “Acknowledge” the changes.
Off-Cycle Reviews

Off cycle reviews are any performance reviews that specifically tell an employee how they would be rated at a specific time in the cycle that it is not the annual performance appraisal. Off-cycle reviews include probationary, interim, transfer, employee-requested, management-driven, and other summary performance appraisals that are used to help keep the employee on track with meeting their goals and clearly state their current rating.

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
To add an Off-Cycle Review, log into NinerTalent (http://jobs.uncc.edu/hr).

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.
The steps to initiate an off-cycle review depend on if it is the employee’s first off-cycle review in this performance cycle. Follow the instructions that fit your scenario:

1. Employee’s first off-cycle review in the current performance cycle
2. Employee’s second or subsequent off-cycle review in the current performance cycle

Scenario 1. Employee’s First Off-Cycle Review in Current Performance Cycle

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.

To create the first off-cycle review for the performance cycle, select the description title that reads ‘Off-Cycle Review’, or click the blue ‘View’ button corresponding to the appropriate process step.

Note the Off-Cycle Review has no due date; however, you should be aware of the timeline for any off-cycle review (or Talent Conversation) that applies to your employee and enter it into this program accordingly. The NinerTalent STAKES timeline or cycle can be found at the beginning of this section.
Once the Off-Cycle Review is selected, the following screen will appear. Here you will enter the following information.

Appraisal Criteria

- **Review Date**
- **Off-Cycle Review Type**
- **Current Performance Status**

- **Comments**
- **Issues/areas for improvement**
- **Deliverables to aid in improvement**

When you complete your first off-cycle review in the current performance cycle you will click the ‘Complete’ button. At this time the review will go to your employee for Acknowledgement. Once, they have acknowledged the review it will be available for you to go back in to the same program and add another review when appropriate. Instructions on how to add the second or subsequent off-cycle review may be found in the instructions on the next page.
Scenario 2. Employee’s Second or Subsequent Off-Cycle Review in Current Performance Cycle

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.

The second and subsequent times you enter an off-cycle review for your employee, you will have search for the off-cycle review by going to the “Performance” menu at the top left of your screen. Click ‘My Employees’ Reviews’ to see past and current performance review cycles documented in the NinerTalent system.

When the screen below appears, it will automatically show you the current performance cycle programs which include the SHRA Performance Review and Off Cycle Review for each of your employees which are currently open. You can also use the search bar (type Off Cycle) or the Program filters on the left hand side of the screen (choose yyyy-yyyy Off-Cycle Review) to find the desired program.

Select the current off-cycle review you want to initiate and click the program link or the blue ‘View Review’ button.
When the following screen appears choose the ‘Plan’ tile or ‘Plan’ link in the left navigation pane to open the off-cycle review.

Once the Off-Cycle Review is selected, the following screen will appear. You will see the previous off-cycle review(s) you entered this cycle. In order to add your new or most recent off-cycle review you should click the blue ‘Actions’ button and select ‘Revise’.
After ‘Revise’ is selected, the following ‘Add Entry’ option will appear beneath the last off-cycle entry that was made. Click the ‘Add Entry’ button to open up a new entry field and begin drafting your next off-cycle review.

When you are finished entering your new off-cycle review click ‘Revise’ at the bottom of the page to complete the action and send it to your employee for acknowledgement.
Using Progress Notes

At any time after your employee has acknowledged his/her performance plan, you may use the Progress Notes functionality to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching sessions. Progress Notes are your personal records to assist with completion of the performance evaluation process and/or off-cycle reviews (performance check-ins). They are employee-specific and are not viewable by the employee. However, all documented items should be professional and performance-related. (Note: Progress Notes are not intended to serve as formal disciplinary action – only documentation of performance-related issues and/or discussions. Formal disciplinary action must be initiated outside of this system.

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

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.
To locate a specific employee, click the ‘My Employee Reviews’ link on the left navigation or by using the ‘Performance’ dropdown.

The following screen will appear for you to locate the specific employee of interest and the associated program you would like to view. Click the link or the blue ‘View Review’ button.

Once selected, the following screen will appear. You may choose Progress Notes from either the left hand menu or the Progress Notes tile.
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.

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 Work Plan

Progress Notes

Title (Optional) 

Note

Add attachment

Save

To get back to NinerTalent, click “Go to UNC Charlotte User Site” in the top right hand corner:
Annual Review Process Steps

*Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your self-appraisal

Supervisor Completes Employee Appraisal

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

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, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To create an employee appraisal or evaluation, select the description title that reads ‘Supervisor Appraisal’, or click the blue ‘View’ button corresponding to the appropriate process step.
Once selected, the Supervisor Evaluation will appear. There are **six (6) tab sections** across the top of the Supervisor Evaluation.

The first tab section is titled “Schedule and Components”. You will find reference information such as the approver’s workflow, the schedule, the components of the system, and the rating scale. In the subsequent tabs you will be rating and commenting on the employee’s performance for the cycle.

**Workflow and Schedule**

**Click HERE TO FIND VIDEO TUTORIALS AND GUIDES ON HOW TO COMPLETE THIS PERFORMANCE PROCESS**
The second and third tab sections indicate Institutional Goals and Individual Goals. On these tab, you will enter a Rating, Supervisor Comments (for any Rating other than Meeting Expectations), and a Performance Improvement Plan (for any Rating of “Not Meeting Expectations”).

**Institutional Goals**

Click HERE to open the Institutional Goals Document.

Please enter a rating and comments for each institutional goal.

*Note: Comments are required for each goal rating of “Not Meeting Expectations” or “Exceeding Expectations”*

- If “Not Meeting Expectations” you must enter the reason and suggestions for improvement.
- If “Exceeding Expectations” you must enter specific example(s) that demonstrate a consistent level of work that exceeds the “meeting expectations” level of performance with minimal oversight.

**EXPERTISE**

- Precision: Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession.
- Resourcefulness: Makes efficient and appropriate use of materials.
- Innovation: Continuously looks for ways to improve efficiency or quality.
- Development: Maintains technical skills and relevant professional credentials.

**Weight:**

10

**Comments and/or Performance Improvement Plans:**

* Rating

Please select

* Comments and/or Performance Improvement Plans

**Note:** A Performance Improvement Plan must include the following information: 1) Issue(s); 2) Corrective action(s); and 3) Timetable(s) for improvement.

When you reach the bottom of each page and have completed comments for each goal, 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.
The next tab section indicates Career Development Goals. On this tab, you will enter Supervisor Comments, as appropriate or necessary.

Career Development Goals

Goal(s):

1. Career Development Goal
2. Career Development Goal
3. Career Development Goal
The next tab section indicates “Overall Performance”. On this tab, you will provide comments regarding the employee’s overall performance during the cycle. **PLEASE READ ALL OF THE INSTRUCTIONS ON THIS PAGE!** There are new scoring guidelines for SHRA appraisals, so please familiarize yourself with this information.

**Note:** All fields must be completed by the supervisor regardless of the overall rating. This process step may not be marked as ‘Complete’ without this required information.

---

**Supervisor Evaluation**

For Norm Niner  
(Score in progress: Not Meeting Expectations)

Once you have completed your appraisal, the next level supervisor will be notified to approve it. You will meet with your employee after the next level supervisor has approved the appraisal. **Please be sure to read all of the instructions on the “Overall Comments” tab regarding the new scoring guidelines for the UNC system policy.**

---

Remember: Pursuant to the UNC system-wide SHRA Performance Appraisal policy, employees who receive a rating of “Not Meeting Expectations” on any goal, or for whom a formal disciplinary action (written warning or greater) was initiated during the current cycle, may not receive an overall rating of “Exceeding Expectations”.

Therefore, the “Score in progress” above will reflect the Overall Performance Rating **UNLESS:**

- The score is “Exceeding Expectations” AND
- The employee was issued a disciplinary action during the cycle and/or has a rating of “Not Meeting Expectations” on any goal in this appraisal

In this scenario, THE EMPLOYEE’S SCORE SHOULD BE DOCUMENTED AS “MEETING EXPECTATIONS” in accordance with our policy.

(For more information on these scoring guidelines, please consult the UNC SHRA Performance Appraisal Policy.)

---

**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

* Was there a formal disciplinary action initiated for this employee after April 1st, 2017?  

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

* 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?

---

Save Draft  Complete
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’. 

![Warning screen image]

To get back to NinerTalent, click “Go to UNC Charlotte User Site” in the top right hand corner:

![Go to UNC Charlotte User Site button]
Next-Level Supervisor Approves Appraisal

Annual Review Process Steps

Once the Supervisor has completed the Supervisor Evaluation, this information will route immediately to the Next-Level Supervisor for consideration/comments.

To approve a SPA Supervisor Review, 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 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, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To review the Supervisor Evaluation, select the description title that reads ‘Next Level Supervisor Approves Appraisal’, or click the blue ‘View’ button corresponding to the appropriate process step.

Remember! You should be reviewing the appraisals to make sure your supervisors have done the following:

- Complied with SHRA Performance Appraisal Guidelines by:
  - ensuring no employee with a disciplinary action in the current cycle or any rating of “Not Meeting Expectations” in the current appraisal has an Overall Rating of “Exceeding Expectations”
  - inputting specific performance examples and performance improvement plan if necessary in the comments box if the employee was rated as “Exceeding Expectations” or “Not Meeting Expectations”
- Rated the employees in their unit consistently if the performance and/or conduct appraised was essentially the same or similar
Once your review has been completed, you may either approve or return the appraisal. Choosing the ‘Approve’ action indicates your concurrence with the Ratings and Comments, as well as, your assurance that all required information is completed and included. Choosing the ‘Return’ option indicates modifications to, and/or additional information for, the Supervisor Appraisal are required and the action is returned to the Supervisor’s queue.

**Overall Rating**

<table>
<thead>
<tr>
<th>Overall Performance Rating</th>
<th>Overall Performance Comments</th>
</tr>
</thead>
</table>

**Comment**

Evaluation Reviewer Comments required if Return option is selected below

Note: The Next-Level Supervisor should ensure that all required information – Comments, Performance Improvement Plan is completed prior to marking the Supervisor Appraisal as “Approved”. If items are missing, please say what actions need to be completed in the comments box and choose the ‘Return’ action.
If you do not enter comments in the box prior to clicking ‘Return’ you will see the following:

![Comment can’t be blank]

Once the Return action is completed correctly, you will be brought to the following action screen and it will read - “The Document has been sent back for revision.” It is now back in the supervisor’s queue to make the necessary corrections.

![SHRA Annual Performance Review (2017-2018)]

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

Once the Next-Level Supervisor has completed his/her review of the Supervisor Rating & Comments, and marked this process step as ‘Approved’, this information will route immediately to the Supervisor. It is time to schedule/conduct a Supervisor/Employee Appraisal Meeting. During this meeting, you and your employee will discuss the ratings, comments, and performance improvement plans (if applicable) contained within the appraisal, as well as, review the status of the career development goals established in the concluding cycle. This discussion may be held concurrently with the Performance Plan Meeting for the next evaluation cycle.

To indicate that the Supervisor/Employee Appraisal Meeting took place, 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 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, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To indicate that the Supervisor/Employee Evaluation Discussion has been completed, select the description title that reads ‘Supervisor/Employee Appraisal Meeting’, or click the blue ‘View’ button corresponding to the appropriate process step.

This process step should be marked as ‘Complete’ only after the supervisor/employee meeting has been conducted. (Note: When you select the ‘Complete’ button associated with this process step, the Supervisor Evaluation is routed immediately to the subject employee for his/her review and acknowledgement.)
After click the ‘Complete’ button the following screen will appear. From this screen, you may review summary information associated with this particular employee’s review.

The last step in this appraisal process is the ‘Employee Acknowledges Appraisal’.

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.
Revise Employee Appraisal

If you need to update or correct information in your employee’s annual appraisal, but it has already been approved by the Next-Level Supervisor, contact Paulette Russell at P.Douglas@uncc.edu or Ext. 70660 (or the Employee Relations Office at Ext. 70662) to request that the action be put back in your queue for revision. You will see the ‘Supervisor Appraisal’ appear back in your ‘Action Items’ when you enter the employee portal.

Once, it has been put back in your queue use the “Supervisor Completes Employee Appraisal” process steps to revise and complete the employee appraisal.

Once you finish revising the appraisal, your changes will go back to the Next-Level Supervisor for approval, then back to you to meet with your employee about the changes made, and last to the employee to “Acknowledge” the changes.