## Table of Contents

NinerTalent Performance Module  .................................................................................................................. 3

**Navigating NinerTalent Performance Module** .......................................................................................... 3

**Logging in and Accessing the Employee Portal** ......................................................................................... 3

**Your Action Items** ....................................................................................................................................... 4

**Searching and Dashboard** ......................................................................................................................... 5

- Example: Review Employee Self-Appraisal .................................................................................................. 8

**EHRA Performance Management** ............................................................................................................ 9

**EHRA Annual Review Process Steps** ......................................................................................................... 9

- EHRA Supervisor Appraisal ......................................................................................................................... 9
- Revise Employee Appraisal .......................................................................................................................... 15

**SHRA Performance Management** ........................................................................................................... 16

**SHRA Performance Plan Process Steps** ..................................................................................................... 16

- Create SHRA Performance Plan .................................................................................................................. 16
- Copy Performance Plan to Other Like Positions .......................................................................................... 23
- Next-Level Supervisor Approves Performance Plan ..................................................................................... 29
- Revise Performance Plan ............................................................................................................................... 32

**SHRA Off-Cycle Reviews** .......................................................................................................................... 33

- Scenario 1. Employee’s First Off-Cycle Review in Current Performance Cycle ........................................... 35
- Scenario 2. Employee’s Second or Subsequent Off-Cycle Review in Current Performance Cycle .................. 37

**SHRA Annual Review Process Steps** ......................................................................................................... 40

- Supervisor Appraisal ...................................................................................................................................... 40
- Next-Level Supervisor Approves Appraisal .................................................................................................... 47
- Revise Employee Appraisal ............................................................................................................................. 51

**Using Progress Notes** .................................................................................................................................... 52
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 ‘...’ 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. 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. Select the item link that corresponds to the process step (“description”) that needs to be completed for a specific employee.

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 or is sent back to you by the Next Level Supervisor or approver of the action.

To find action you have already completed, click ‘My Employees’ Reviews’ to access the ‘Review Dashboard’.
Searching and Dashboard

You can search for employee reviews by going to the links at the top left of your screen. Click ‘My Employees’ Reviews’ to take you to your ‘Reviews Dashboard’. Here you can see past and current performance review programs and actions documented in the NinerTalent system.

When the screen below appears, it will automatically show you the current active performance cycle programs which are open. (If you notice any discrepancies, call Ext. 7-0660 or email nt-stakes@uncc.edu.) You can monitor your performance processes easily by using the colored status tabs at the top of the dashboard. You can also get a quick look at a specific process step name and owner by hovering over the colored step blocks.
The filter bar at the top of the navigation screen allows you to sort by a specific program, search for an employee, and/or group the information by supervisor, reporting unit, etc. The ‘Advanced’ filter button gives you more sort options including ‘Program Status’. By setting the ‘Program Status’ to ‘Closed’, you will be able to access past performance programs which will contain records such as performance plans and evaluations.

Select the desired employee for a particular program to access the “Overview” screen. This screen is where you will access the performance records and history.
The “Overview” screen will show you all of the performance tasks that will or have occurred this cycle. It also lists 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 desired document.

You can also find your employee’s current job description by clicking the job title, under the employee’s name, in the top left corner of the screen. (See arrow)
Example: Review Employee Self-Appraisal

Use the “Searching and Dashboard” tips mentioned above (pages 5-7) to find the current performance program (i.e. 2017-2018 STAKES Review) in which the Employee Self-Appraisal is housed. Once you get to the ‘Overview’ screen, shown below, click ‘Self Evaluation’.

Note: Only the questions with an asterisk (*) were required to be answered.
EHRA Performance Management

The Performance Management module is used to: 1) Complete an EHRA Appraisal; and to 2) Document performance feedback (Progress Notes).

EHRA Annual Review Process Steps

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

EHRA Supervisor 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.

Remember! Before you go to complete your ‘Supervisor Appraisal’, you should review the Employee Self-Appraisal to see how the employee feels they performed during the cycle and what future job priorities and career goals they have for the new cycle. EHRA Self-Appraisal forms can be found on the STAKES website.

‘Item’ indicates the review type (EHRA Performance Evaluation). ‘Description’ indicates the current process step and/or required action. To complete the appraisal, select the item for the desired employee with the description ‘Supervisor Appraisal’.
Once selected, the Supervisor Evaluation will appear. You will see the following on this page:

- **Instructions in blue** that will give you general information about the action you are about to perform
- **Four (4) tab sections** that make up the Supervisor Evaluation
- **Helpful links & instructions** to help you complete this performance evaluation

**Supervisor Evaluation** for Jeanne Madorin (Score in progress: Unrated)

Assess how well your employee met the goals established this cycle by rating each goal and providing feedback regarding the performance which resulted in the rating.

The rating scale is from "1 - Not Meeting Expectations" to "7 - Exceeding Expectations."
- 1 and 2 = Not Meeting Expectations
- 3, 4, and 5 = Meeting Expectations
- 6 and 7 = Exceeding Expectations

Once you have completed the appraisal, it will go to the employee for acknowledgment.

On the first two tabs, Institutional Goals and Goals & Objectives, you will enter a ‘Rating’ and ‘Comments and/or Performance Improvement Plans’.*

<table>
<thead>
<tr>
<th>Rating</th>
<th>Required Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeding Expectations</td>
<td>Comments describing the employees work this cycle, which support a rating of exceeding expectations as it is described in the institutional goals guidelines or in your individual goals description.</td>
</tr>
<tr>
<td>Meeting Expectations</td>
<td>“n/a” (comments not required, but field requires an entry)</td>
</tr>
<tr>
<td>Not Meeting Expectations</td>
<td>Comments describing the performance that led to this rating and a Performance Improvement Plan (PIP). The PIP should include any actions that must be taken for the employee to meet the performance expectation and/or to assist in getting them to those performance expectations (i.e. any retraining, performance actions &amp; deadlines) and a timeframe in which this performance issue be resolved.</td>
</tr>
</tbody>
</table>

*Please Note! The rating comment instructions do not apply to the Institutional Goals. Supervisors are not required to enter comments to justify institutional goal ratings for EHRA employees. However, the overall comments at the end of this appraisal should support the ratings entered.
The first tab is “Institutional Goals”. You will be required to enter a ‘Rating’ and you may enter ‘Comments and/Performance Improvement Plan’ information if desired. If you do not want to comment, please enter an “n/a” in the comments box to complete the field entry.

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 second tab section is “Goals & Objectives”. On this tab, you will identify any goals and objectives that were established and communicated to your employee to accomplish this cycle. **Three to five goals is recommended.**

You will be required to enter a brief description or ‘Goal Name’, a ‘Rating’, and provide ‘Comments’ that support the employee’s performance in accomplishing the goal this cycle. You may use the ‘Attachments’ link to attach documents (PDF format) that define the performance goals or accomplishments in meeting the goal.

The third tab section is “Professional Development Activities”. On this tab, you will describe any job-related personal or professional or development activities that the employee has participated in this cycle. **Comments are required.**
The fourth tab section is “Overall Performance”. On this tab, you will provide comments regarding the employee’s overall performance during the cycle. **COMMENTS ARE REQUIRED!** You may use the ‘Attachments’ link to attach documents (PDF format). If your comments are contained in the document you may enter “Please see attached document” in the ‘Comments’ box.

**Note:** If you click the ‘Complete’ button the appraisal will go directly to your employee. If your supervisor requires you to submit the appraisal to him/her for approval first - click ‘Save Draft’ then ‘Print’ your document to a PDF format.

Printing – Go to the blue ‘Actions’ button at the top of the page and select print. Select “Print to PDF” when selecting a printer.

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’.
To get back to NinerTalent, click “Go to UNC Charlotte User Site” 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 sent to the employee to acknowledge contact nt-stakes@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 Appraisal’ process steps to revise and complete the employee appraisal.

Once you finish revising the appraisal and click complete, the appraisal will go back to the employee to “Acknowledge” the changes.
SHRA Performance Management

The Performance Management module is used to: 1) Create a SHRA Performance Plan; 2) Modify an existing SHRA Performance Plan; 3) Document Performance Feedback (Off-Cycle Reviews or Progress Notes); and to 4) Complete a SHRA Appraisal.

SHRA Performance Plan Process Steps

Create SHRA Performance Plan

(Video available)

To create a SHRA Performance Plan, 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, 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 item for the desired employee with the description ‘Performance Plan Creation’.

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. You will see the following on this page:

- **Instructions in blue** that will give you general information about the action you are about to perform
- **Four (4) tab sections** that make up the Supervisor Evaluation
- **Helpful links & instructions** to help you complete this performance evaluation

The first tab section is titled “**Institutional Goals**”. This tab is where you will enter a weight for each corresponding institutional goals and any specific standards of performance if desired. You will need to provide a percentage weight (excluding the % sign) 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 second tab section is titled “Individual Goals”. This is where you will enter three to five individual goals and their corresponding percentage weights (excluding the % sign). You will need to provide a 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.

If you decide you want to delete a goal altogether, put a check in the ‘Remove Entry?’ box under that specific goal and click ‘Save’.

SHRA Performance Training
- Hold informational forums for employees, training for supervisor, update website, and develop informational resources by – April 1, 2017
The third 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.)*

### 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.

<table>
<thead>
<tr>
<th>Career Development Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Training</td>
</tr>
<tr>
<td>2. Re-certification/License renewal</td>
</tr>
<tr>
<td>3. Cross training</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Remove Entry?</th>
</tr>
</thead>
</table>
The fourth 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**

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

### 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
- 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.
If you fail to complete any of the required sections in the plan you will get the following message the plan will remain in draft mode. The message will give a general indication as to why the process was unable to be completed. Correct these errors and click the ‘Complete’ button again to finish this task.

If your plan goes through successfully, you will see the following message at the top of your screen. And, the completed plan document will be available for you to print and/or copy via the ‘Actions’ button.

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

(Video available)

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 ‘…’ 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’. Once here, click ‘My Employee Reviews’ on the left navigation or via the ‘Performance’ dropdown to take you to the ‘Reviews Dashboard’.

The ‘Reviews Dashboard’ will appear for you to locate the specific employee and associated program from which you want to copy the Performance Plan. Click the employee’s name to access their performance plan.
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’ 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. Select the performance components you want to be copy (to include Individual Goals, Career Development Activities, and Evaluation Methods or any of the institutional goals listed) then click the ‘Continue’ button.

**Note!** The items indicated with the red arrows are merely instructions or descriptions within the document and will not change whether selected or not.
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?

Showing only employees included in the program, 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></td>
<td>Goldie Dust</td>
<td>Human Resources</td>
<td>Charlotte College</td>
</tr>
</tbody>
</table>

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

It is **not recommended** that you select/check the box that reads “Copy Plan to selected employees and complete the associated Step...”

If this is selected, the plan will go directly to the Next-Level Supervisor for approval. You should review the copied performance plans prior to this to ensure all elements in the plan have copied over correctly.

Click the ‘Copy Objective Plan’ button to proceed.

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.

**Copy Objective Plan**

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 can also find the plans you copied in your Actions Items box. Get there by clicking the ‘Home’ button at the top of your screen. All copied items will still have the following description - “Performance Plan Creation” until you go into the plan and click the ‘Complete’ button on the final tab of the plan document.
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

(Video available)

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 an SHRA Performance Plan, 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, 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 item for the desired employee with the description ‘Next Level Supervisor Approves Performance Plan’.

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 at the top of the screen:

![Comment can't be blank]

Once the Return action is completed correctly, you will see the following at the top of the screen. It is now back in the supervisor’s queue to make the necessary corrections.

![The Document has been sent back for revision]

Once you have received a Performance Plan that you agree with you will ‘Approve’ the action.

**Note:** Once you click the ‘Approve’ button, the Supervisor Appraisal will be sent to the employee for review and acknowledgement.

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, email nt-stakes@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.
SHRA Off-Cycle Reviews

(Video available)

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 ‘...’ in the left hand corner to initiate the dropdown and click ‘UNC Charlotte Employee Portal’.
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 item for the desired employee with the description ‘Off-Cycle Review’.

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.

- **Date of Review**
- **Off-Cycle Review Type**
- **Areas that need improvement:**
  - Expertise
  - Accountability
  - Customer-Oriented
  - Team-Oriented
  - Compliance & Integrity
  - Supervision
- **Overall Performance Rating**
- **Is the employee meeting expectations overall?**
- **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 the employee has 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 to search for the off-cycle review by clicking on to the ‘My Employees’ Reviews’ link at the top left of your screen. Past and current performance review cycles documented in the NinerTalent system can be found here.

When the screen below appears, it will automatically show you the current performance cycle programs which include the SHRA STAKES Review and Off Cycle Review for each of your employees which are currently open. You can also use the search bar or the Program filter to find the desired program.

Select the employee for whom you wish to create an off-cycle review by clicking their name.
When the following screen appears choose the ‘Plan’ link in the left navigation pane or click Step 1, the ‘Off Cycle Review’ link, 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’.

Employee needs to improve his skills in the areas of Expertise and Customer-Orientation. He is often not attentive to the needs of the customer and after being in his position for 6 months is still not knowledgeable of general office policies/procedures or where to locate them. Also, he is not familiar enough with the units within Human Resources to correctly direct customers.

By the next quarter review the employee needs to become familiar with the the policies, procedures, and processes of the department. In order to assist in gaining this
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.
SHRA Annual Review Process Steps

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

Supervisor 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.

Remember! Before you go to complete your ‘Supervisor Appraisal’, you should review the ‘Employee Self-Evaluation’ to see how the employee feels they performed during the cycle and what future job priorities and career goals they have for the new cycle. If you need instructions on how to find this document go to the Searching & Dashboard section under Example: Review Employee Self-Appraisal.

‘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 item for the desired employee with the description ‘Supervisor Appraisal’.
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.

**Supervisor Evaluation**

(Score in progress: Unrated)

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.**

**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’ and ‘Supervisor Comments’.

Please Note! The following comments are required for the corresponding ratings.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Required Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeding Expectations</td>
<td>Comments describing the employees work this cycle, which support a rating of exceeding expectations as it is described in the institutional goals guidelines or in your individual goals description.</td>
</tr>
<tr>
<td>Meeting Expectations</td>
<td>“n/a” (comments not required, but field requires an entry)</td>
</tr>
<tr>
<td>Not Meeting Expectations</td>
<td>Comments describing the performance that led to this rating and a Performance Improvement Plan (PIP). The PIP should include any actions that must be taken for the employee to meet the performance expectation and/or to assist in getting them to those performance expectations (i.e. any retraining, performance actions &amp; deadlines) and a timeframe in which this performance issue be resolved.</td>
</tr>
</tbody>
</table>

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.
- Resourcing: 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.
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.)

Required fields are indicated with an asterisk (*).

**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?

Please select

[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:
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 SHR A Supervisor Review, 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 ‘…” 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, Off-Cycle Review, New Employee, etc.). ‘Description’ indicates the current process step and/or required action. To review the Supervisor Evaluation, select the item for the desired employee with the description ‘Next Level Supervisor Approves Appraisal’.
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.

Note: The Next-Level Supervisor should ensure that all required information, including comments for Exceeding Expectations and/or Performance Improvement Plan information 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:

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.
Note: Once you click the ‘Approve’ button, the Supervisor Appraisal will be sent to the employee for review and acknowledgement.

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, nt-stakes@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 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.
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 only viewable by the employee if you share the item with them via the share button. 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 ‘...’ 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 all relevant information, add an attachment (if desired), and click ‘Create’.