# Table of Contents

Performance Management ............................................................................................................................................ 3

**Work Plan Process Steps** .................................................................................................................................. 3

**Create/Edit SPA Work Plan** ................................................................................................................................. 3

**Completing the Supervisor/Employee Work Plan Discussion** ............................................................................... 14

**Using Progress Notes** ........................................................................................................................................... 16

**Annual Review Process Steps** ............................................................................................................................. 20

**Supervisor Completes Employee Review** ............................................................................................................. 20

**Evaluation Reviewer Approves Supervisor Rating/Comments** .............................................................................. 30

**Supervisor/Employee Evaluation Discussion** ...................................................................................................... 35
Performance Management

The Performance Management module is used to: 1) **Create** a SPA Work Plan; 2) **Edit/Modify** an existing SPA Work Plan; and 3) **Complete** a SPA evaluation.

Work Plan Process Steps

Create/Edit SPA Work Plan

To create/edit a SPA Work Plan, log into Niner Talent (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, Transfer/Reallocation, New Employee, Exit). ‘Description’ indicates the current process step and/or required action. To create a new, and/or modify an existing, work plan, select the description title that reads ‘Supervisor Creates/Edits Work Plan’, or click the blue ‘View’ button corresponding to the appropriate process step.
Once selected, the Work Plan will appear. Note: There are five (5) tab sections across the top of the Plan.

The first tab section indicates SMART Goals. On this tab, you enter/edit all goals associated with the job duties aligned with each functional competency. You may add new goals, and/or edit/replace existing goals, as appropriate or desired.
<table>
<thead>
<tr>
<th>Competency Name</th>
<th>Job Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied Knowledge - HR Program and Organization</td>
<td>Demonstrates knowledge of State, federal and client policy and policy interpretations and HR best practices affecting HR program area(s) and analyzes and explains how policies or procedures apply to client's unique needs. Applies operational knowledge of the purpose of the client's organization including its mission, services, clients and measures of business effectiveness in order to place client needs into perspective and assure assistance is appropriate to the situation. Identifies and understands issues and problems in HR program area(s) to resolve most of them independently. Modifies processes using contemporary applicable technology, web-based data systems and programs.</td>
</tr>
<tr>
<td>Priority</td>
<td>1</td>
</tr>
</tbody>
</table>

* Goal(s)
When you reach the bottom of the page and have completed/edited goals for each functional competency, you may click “Save Draft” or “Next”. Choosing the ‘Save Draft’ button will allow you to come back and complete the work plan 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 Behavioral Goals. On this tab, you will enter/edit the goals associated with each behavioral competency identified and/or chosen. You may add additional behavioral competencies, remove existing competencies, add new goals, or edit/replace existing goals, as necessary and/or appropriate. Please number each goal that is added.

To add Behavioral Competencies, click the Behavioral Competency dropdown menu and select the desired Competency from the list of available options.
Required fields are indicated with an asterisk (*).

**Behavioral Goals**

* Behavioral Competency

Please select

- Accountability
- Adaptability
- Advocacy
- Attention to Detail
- Building Trust
- Communication
- Continuous Improvement
- Creativity
- Customer Service
- Delegation
- Dependability
- Energy
- Impact
- Influence
- Initiative
- Innovation
- Integrity
- Judgment
- Managing Conflict

* Goal(s)

1. Behavioral Goal

Please number each goal

- [ ] Remove Entry?
Once selected, and goal(s) have been entered, you may add additional Behavioral Competencies as necessary, or desired, by choosing the ‘Add Entry’ button at the bottom right hand corner of the page.

Once selected, please choose another Behavioral Competency and enter all appropriate goals. Note: You may add as many Behavioral Competencies as deemed appropriate, or necessary. However, you must include at least one Behavioral Competency entry.
To remove an existing entry, select the checkbox next to “Remove Entry” and click “Save Draft” at the bottom of the screen.
The next tab section is Career Development Goals. On this tab, you will enter/edit any Career Development goals associated with the specific employee. Career Development goals may include such items as: training workshops, technical skills training, professional certifications and/or conferences, etc. Please number each goal that is added.

Note: Career Development goals are strongly encouraged as a ‘best practice’ and should be updated on an annual basis.
The next tab section indicates 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’, you are indicating that you expect your employee to provide full comments/input during the performance evaluation process. Please ensure that this expectation is communicated to your employee during the work plan review and/or prior to the start of the evaluation process.

The final tab section indicates Comments. On this tab, you may add additional comments as deemed appropriate and/or necessary.
Note: Once you have completed all required information, it is strongly recommended that you choose ‘Save Draft’ until you have completed the Supervisor/Employee Work Plan Discussion. Such action will enable any necessary edits resulting from this discussion. However, if you choose ‘Complete’ you may still make any necessary edits to the work plan.

**Completing the Supervisor/Employee Work Plan Discussion**

Once you have chosen either the ‘Save Draft’ or ‘Complete’ option, it is time to schedule/conduct a Supervisor/Employee Work Plan Discussion. During this meeting, you and your employee will discuss the expectations contained within the work plan, as well as, the method(s) of evaluation you intend to use to conduct your assessment of work performance.

Note: If you marked the Work Plan as ‘Complete’ in the previous process, please add any necessary edits to the work plan prior to completing this process step. If you chose the ‘Save Draft’ option, you may make any necessary edits, mark the work plan as ‘Complete’, and then mark the Supervisor/Employee Work Plan Discussion as ‘Complete’.
This process step should be marked as ‘Complete’ only after the Supervisor/Employee Work Plan Discussion has been conducted. Note: When you select the ‘Complete’ button associated with this process step, the Work Plan is routed immediately to the subject employee for his/her review and acknowledgement.

Once you have completed this action item, the following screen will appear. On this screen, you may review the work plan and/or history associated with this action. When the employee has acknowledged his/her work plan, an Approvals & Acknowledgements button will become viewable.
Using Progress Notes

At any time after your employee has acknowledged his/her work 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. 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 Niner Talent (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.

![Image of the PeopleAdmin interface with the 'Go to UNC Charlotte Employee Portal' link highlighted.]

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

To locate a specific employee, click the ‘My Employee Reviews’ link and select the appropriate Review Cycle using the filters on the left hand side to narrow search results.

![Image of the PeopleAdmin interface with the 'My Employees' Reviews' section highlighted.]

When you have located the specific employee of interest, you may click the link associated with the program or the blue ‘View Review’ button.
Once selected, the following screen will appear. You may choose Progress Notes from either the left hand menu or the Progress Notes box.

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.
Annual Review Process Steps

Supervisor Completes Employee Review

*Reference Progress Notes as necessary, when completing evaluation
Once your employee has completed his/her Self-Assessment, this information will route immediately to you for review and consideration.

To complete a SPA Employee Review, log into Niner Talent (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.

![Go to UNC Charlotte Employee Portal](image)

**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, Transfer/Reallocation, New Employee, Exit). ‘Description’ indicates the current process step and/or required action. To create an employee evaluation, select the description title that reads ‘Supervisor Completes Employee Evaluation’, or click the blue ‘View’ button corresponding to the appropriate process step.
Once selected, the Supervisor Evaluation will appear. Note: Five (5) tab sections across the top of the Supervisor Evaluation.
The first tab section indicates SMART Goals. On this tab, you will enter a Rating, Supervisor Comments (for any Rating other than 3–Meets Expectations), and a Performance Improvement Plan (for any Rating of 2–Below Expectations or 1–Unsatisfactory) for each functional competency. Note: A Performance Improvement Plan must include the following information: 1) Issue(s); 2) Corrective action(s); and 3) Timetable(s) for improvement.

Job Duties:

Demonstrates knowledge of State, federal and client policy and policy interpretations and HR best practices affecting HR program area(s) and analyzes and explains how policies or procedures apply to client’s unique needs. Applies operational knowledge of the purpose of the client’s organization including its mission, services, clients and measures of business effectiveness in order to place client needs into perspective and assure assistance is appropriate to the situation. Identifies and understands issues and problems in HR program area(s) to resolve most of them independently. Modifies processes using contemporary applicable technology, web-based data systems and programs.

Priority:

1

Goal(s):

1. SMART Goal
2. SMART Goal
3. SMART Goal
To add a Rating, click the Rating dropdown menu and select the desired Rating from the list of available options.

Note: Based upon the Rating selected, please follow the instructions as indicated in the help text highlighted by the green circles.

When you reach the bottom of the page and have completed/edited goals for each functional competency, 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 Behavioral Goals. On this tab, you will enter a Rating, Supervisor Comments (for any Rating other than 3–Meets Expectations), and a Performance Improvement Plan (for any Rating of 2–Below Expectations or 1–Unsatisfactory) for each functional competency. Note: A Performance Improvement Plan must include the following information: 1) Issue(s); 2) Corrective action(s); and 3) Timetable(s) for improvement.
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

Comments

Save Draft  Next
The next tab section indicates Overall Rating & Comments. On this tab, you will enter an Overall Performance Rating and Supervisor Comments.

Note: Both 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.

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 return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Evaluation Reviewer Approves Supervisor Rating/Comments

Annual Review Process Steps

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

To approve a SPA Supervisor Review, log into Niner Talent (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, Transfer/Reallocation, New Employee, Exit). ‘Description’ indicates the current process step and/or required action. To review the Supervisor Evaluation, select the description title that reads ‘Evaluation Reviewer Approves Supervisor Rating/Comments’, or click the blue ‘View’ button corresponding to the appropriate process step.
Welcome to the Employee Portal, Kieffer Gaddis

Your Action Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Due Date</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPA Exit Review (2015-2016) for Sarah Ekis</td>
<td>Supervisor Creates Exit Review</td>
<td>n/a</td>
<td>Available</td>
<td>View</td>
</tr>
<tr>
<td>SPA Transfer/Reallocation Performance Review (2015-2016) (Copy) for Sarah Ekis</td>
<td>Supervisor Creates/Edits Work Plan</td>
<td>n/a</td>
<td>Available</td>
<td>View</td>
</tr>
<tr>
<td>SPA Transfer/Reallocation Performance Review (2015-2016) (Copy) for Ashley Sobel</td>
<td>Supervisor Creates/Edits Work Plan</td>
<td>n/a</td>
<td>Available</td>
<td>View</td>
</tr>
<tr>
<td>SPA Annual Performance Review (2015-2016)</td>
<td>Evaluation Reviewer Approves</td>
<td>n/a</td>
<td>Available</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Supervisor Rating/Comments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

SPA Annual Performance Review (2015-2016)

Evaluation Type: Focal
Program Timeframe: 03/01/15 to 02/29/16
Co-reviewer: N/A

Review Status:
Last Updated: June 26, 2015 15:36
Last Completed Step: Supervisor Completes Employee Evaluation

Overall Rating: 3 - Meets Expectations

Supervisor Evaluation for Norm Niner

SMART Goals

Competency Name:
Applied Knowledge – HR Program and Organization

Job Duties:

Demonstrates knowledge of State, federal and client policy and policy interpretations and HR best practices affecting HR program area(s) and analyzes and explains how policies or procedures apply to client’s unique needs. Applies operational knowledge of the purpose of the client’s organization including its mission, services, clients and measures of business effectiveness in order to place client needs into perspective and assure assistance is appropriate to the situation. Identifies and understands issues and problems in HR program area(s) to resolve most of them independently. Modifies processes using contemporary applicable technology, web-based data systems and programs.
Once your review has been completed, you may choose from the following actions: 1) Print; 2) Approve; or 3) Return. 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 Evaluation are required and returns this action to the Supervisor’s queue. Comments with your instructions to the supervisor will be included as part of this action.

Note: The Evaluation Reviewer should ensure that all required information – Comments, Performance Improvement Plan is completed prior to marking the Supervisor Evaluation as “Complete”. If items are missing, please choose the ‘Return’ action.
To return to the NinerTalent site, click the ‘Go to UNC Charlotte User Site’ button in the top right hand corner.
Supervisor/Employee Evaluation Discussion

Once the Evaluation Reviewer 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 Evaluation Discussion. During this meeting, you and your employee will discuss the ratings, comments, and performance improvement plans (if applicable) contained within the evaluation, as well as, a review of your career development goals. This discussion may also be used to briefly discuss goals for the next evaluation cycle.

To schedule/conduct a Supervisor/Employee Evaluation Discussion, log into Niner Talent (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.

![Go to UNC Charlotte Employee Portal](image)

**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, Transfer/Reallocation, New Employee, Exit). ‘Description’ indicates the current process step and/or required action. To schedule/complete the Supervisor/Employee Evaluation Discussion, select the description title that reads ‘**Supervisor/Employee Evaluation Discussion**’, or click the blue ‘**View**’ button corresponding to the appropriate process step.

![Supervisor/Employee Evaluation Discussion](image)

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.
The following screen will appear. From this screen, you may review summary information associated with this particular employee review.

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.