

UNC Charlotte
STAKES PERFORMANCE

NinerTalent Performance Portal - Employee Guide



Human Resources
UNC Charlotte
6/4/2019



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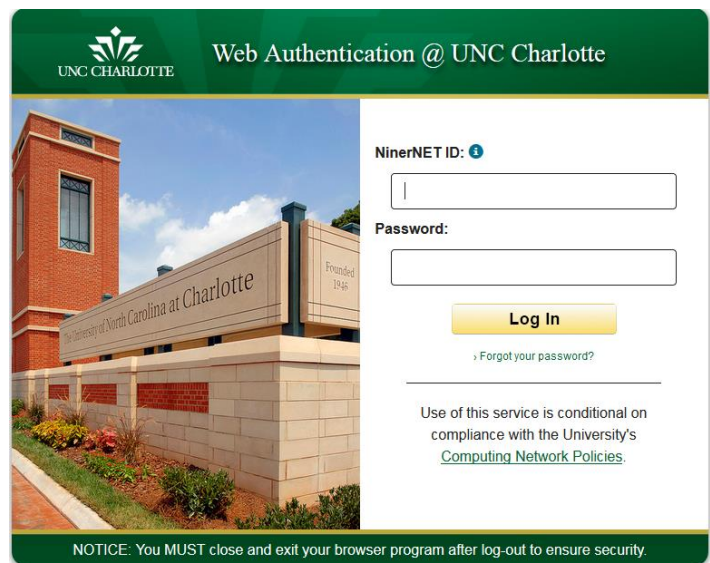
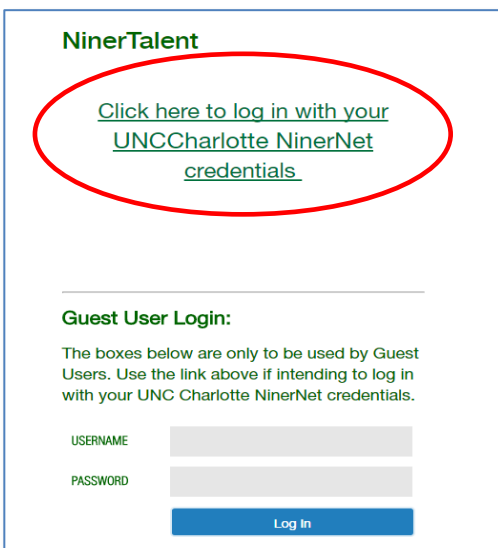
Navigating NinerTalent Performance Module

(video available)

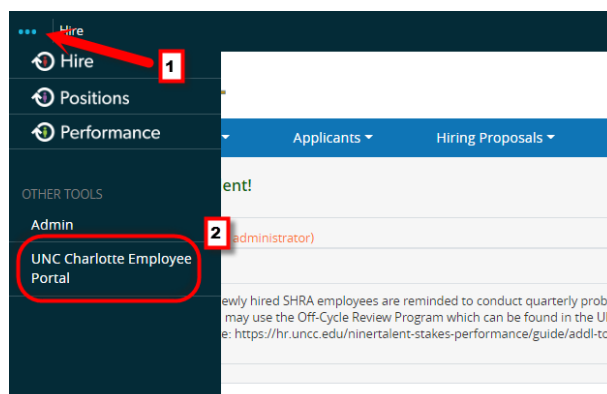
NinerTalent is UNC Charlotte's Human Resources Management System (HRMS) for Employees and Hiring Managers. The **UNC Charlotte Employee Portal** in NinerTalent is specifically used to maintain yearly performance plan and appraisal information. It can be used to find both current and past performance actions including performance plans, evaluations, approvals & acknowledgments, progress notes, etc.

Logging in and Accessing the Employee Portal

Log into NinerTalent (<http://jobs.uncc.edu/hr>) using your NinerNet credentials:



Once logged in, click the '...' in the left hand corner to initiate the dropdown and click 'UNC Charlotte Employee Portal'.





Your Action Items

When you reach the UNC Charlotte Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention (i.e. Employee acknowledgement). Note any 'Due Date(s)' indicated.

'Item' indicates the review type (Annual, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. Select the item link that corresponds to the process step description you want to complete.

The screenshot shows the NinerTalent Employee Portal interface. At the top, there is a navigation bar with 'Home', 'Performance', and 'Progress Notes'. A 'Go to UNC Charlotte User Site' button and 'PeopleAdmin' link are also visible. Below the navigation bar, a welcome message reads 'Welcome to the Employee Portal, Katherine Tomey'. On the left, there is a sidebar with a 'My Reviews' button. The main content area is titled 'Your Action Items' and features a search bar. Below the search bar is a table with the following data:

Item	Description	Due Date	Status
2018-2019 Off-Cycle Reviews for Katherine Tomey	Employee Acknowledges Performance Plan		Available

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.

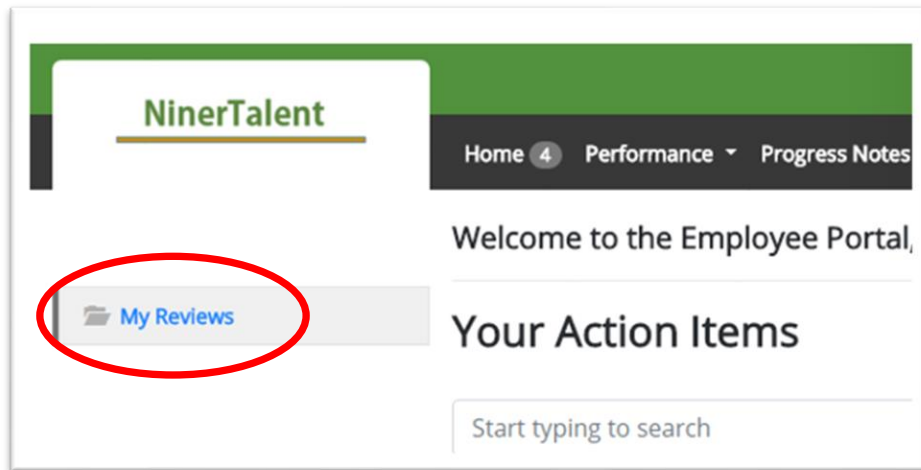
This screenshot shows the same NinerTalent Employee Portal interface as the previous one. The 'Home' button in the top navigation bar and the 'My Reviews' button in the left sidebar are circled in red, indicating where to click to return to the 'Your Action Items' page.

If you would like to review documents that you have completed and are no longer on **'Your Action Items'** page, click **'My Reviews'** to access the **'Review Dashboard'**.



Searching and Dashboard

You can search for reviews by going to the link at the top left of your screen. Click **'My Reviews'** to see past and current performance review cycles documented in the NinerTalent system.



When the screen below appears, you will be able to select from a list of past and current performance review cycles. You can also use the filters on the left hand side to narrow search results.

Select the desired highlighted program you want to review or click the blue 'View Review' button to open the overview page.

Norm Niner

Program: All Programs
Reporting org unit: All Org Units
Program Type: All Types
Open/Completed: All

My Reviews

Program	Progress	Type	Score	Review Status	Last Update	Action
2015-2016 SPA Annual Performance Review	<input checked="" type="checkbox"/>	Focal	4 - Exceeds Expectations	Complete	April 29, 2016 15:22	View Review
2016-2017 SHRA Annual Performance Review	<input checked="" type="checkbox"/>	Focal	Exceeds Expectations	Complete	April 28, 2017 11:00	View Review
2017-2018 Off-Cycle Reviews	<input type="checkbox"/>	Focal	-	Open	May 29, 2017 10:22	View Review
2017-2018 SHRA Annual Performance Review	<input type="checkbox"/>	Focal	-	Cancelled	May 29, 2017 11:00	View Review
2017-2018 SHRA STAKES Review	<input checked="" type="checkbox"/>	Focal	-	Open	November 03, 2017 09:46	View Review
SPA Annual Performance Review (2015-2016)	<input type="checkbox"/>	Focal	-	Complete	July 02, 2015 08:56	View Review

Showing 1 to 6 of 6 entries



The **“Overview”** screen will show you all of the performance tasks that will or have occurred this cycle, the task owner, the date the task 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 current job description by clicking the job title, under your name, in the top left corner of the screen. (See arrow)

The screenshot displays the NinerTalent Performance Portal interface. At the top, there is a navigation bar with the NinerTalent logo, a search icon, and user information (Hello, Charlotte, Log Out). Below the navigation bar, there is a sidebar menu on the left with options: Overview, Plan, Supervisor Evaluation, Self Evaluation, Approvals & Acknowledgements, Progress Notes, History, My Reviews, and My Employees' Reviews. A red arrow points to the 'Position Description' link in the 'Plan' section. Another red arrow points to the 'History' link. A third red arrow points to the 'Program Information' link. The main content area shows a table of performance tasks with columns: Task, Task Owner, Date Opened, Date Completed, and Due Date. The tasks are numbered 1 through 9. Task 1 is 'Performance Plan Creation' by Charlotte College Supervisor, completed on 2017-10-05. Task 2 is 'Next Level Supervisor Approves Performance Plan' by Dean Manager, completed on 2017-11-02. Task 3 is 'Supervisor/Employee Performance Plan Meeting' by Charlotte College Supervisor, completed on 2017-11-06. Task 4 is 'Employee Acknowledges Performance Plan' by Norm Niner, completed on 2017-11-06. Task 5 is 'Employee Self-Appraisal' by Norm Niner, completed on 2018-03-01. Task 6 is 'Supervisor Appraisal' by Charlotte College Supervisor, completed on 2018-05-01. Task 7 is 'Next Level Supervisor Approves Appraisal' by Dean Manager, completed on 2018-05-08. Task 8 is 'Supervisor/Employee Appraisal Review Meeting' by Charlotte College Supervisor, completed on 2018-05-11. Task 9 is 'Employee Acknowledges Appraisal' by Norm Niner, completed on 2018-05-15. On the right side, there is a section for '2017-2018 SHRA STAKES Review' with details: Review Status: Open, Evaluation Type: Focal, Program Timeframe: 04/01/17 to 03/31/18, Last Updated: November 06, 2017 15:42, and Last Completed Step: Employee Acknowledges Performance Plan.

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Performance Plan Creation	Charlotte College Supervisor	2017-05-29	2017-10-05	2017-07-14
2 Next Level Supervisor Approves Performance Plan	Dean Manager Reviewing Officer		2017-11-02	2017-07-21
3 Supervisor/Employee Performance Plan Meeting	Charlotte College Supervisor		2017-11-06	2017-07-28
4 Employee Acknowledges Performance Plan	Norm Niner		2017-11-06	2017-08-04
5 Employee Self-Appraisal	Norm Niner	2018-03-01		2018-04-13
6 Supervisor Appraisal	Charlotte College Supervisor			2018-05-01
7 Next Level Supervisor Approves Appraisal	Dean Manager Reviewing Officer			2018-05-08
8 Supervisor/Employee Appraisal Review Meeting	Charlotte College Supervisor			2018-05-11
9 Employee Acknowledges Appraisal	Norm Niner			2018-05-15

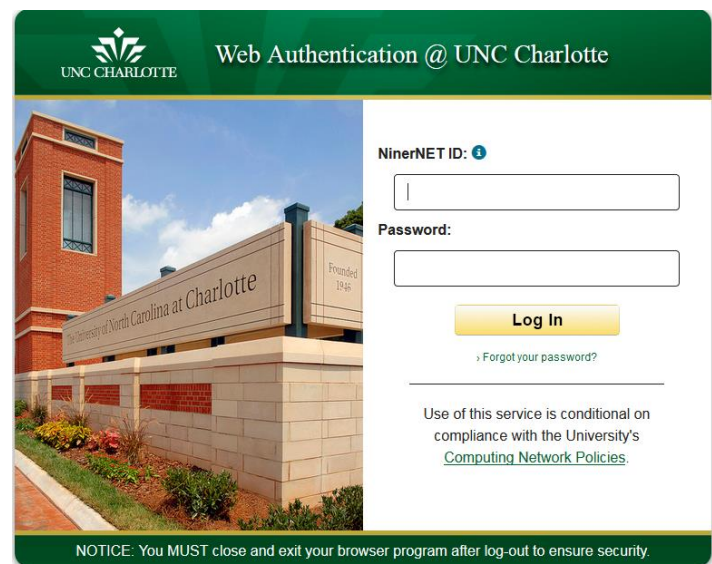
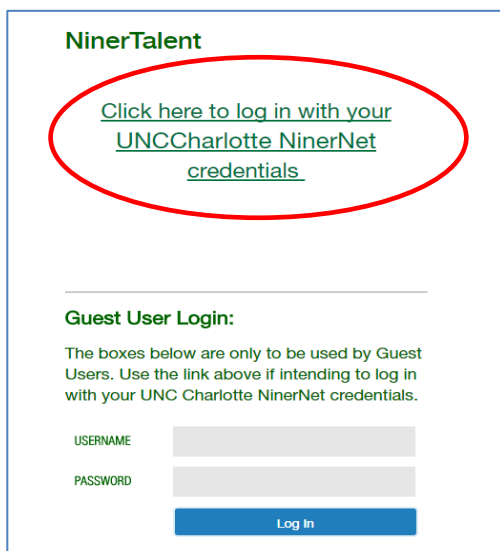


Using Progress Notes

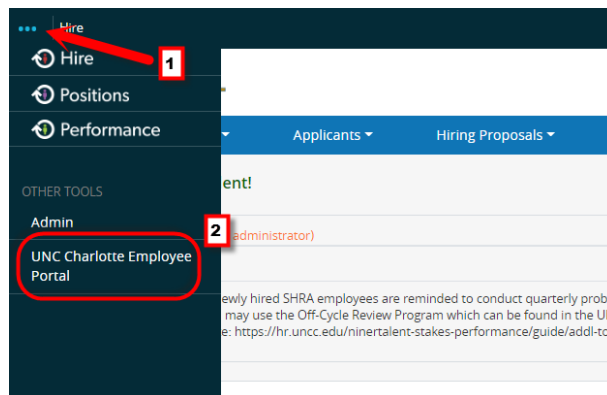
[\(See Navigation Video\)](#)

At any time after you have acknowledged your performance plan, you may use the Progress Notes functionality to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching. Progress Notes are your personal records to assist with completion of the performance evaluation process. They are confidential and are not viewable by your supervisor unless you share them with your supervisor via the share button. Your supervisor may also share progress notes with you. Remember, all documented items should be professional and performance-related.

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

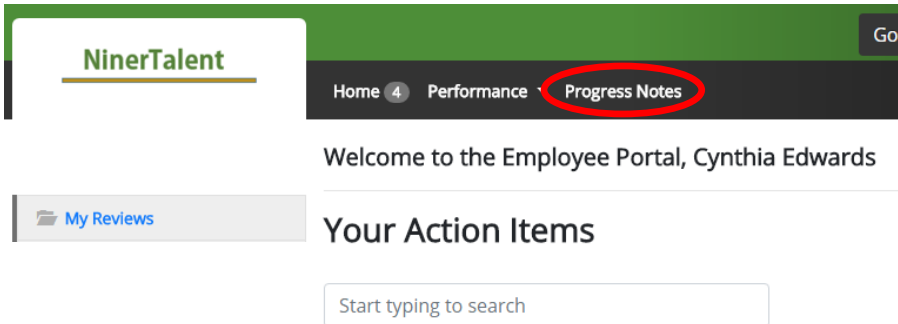


Once logged in, click the '...' in the left hand corner to initiate the dropdown and click 'UNC Charlotte Employee Portal'.

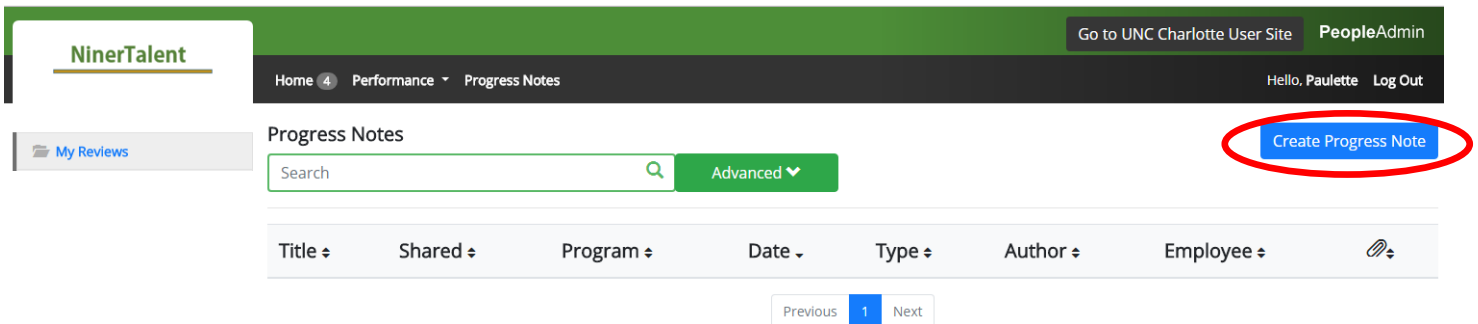




To document a progress note for yourself or any of your employees you can click the **'Progress Notes'** button at the top of your screen.



Once selected, the following screen will appear. Click the blue **'Create Progress Note'** button on the right side of your screen.



Enter any information that may be useful in documenting your performance, add an attachment (if desired), and click **'Create'**.

Program (optional)
-- choose an option --

Employee *
-- choose an option --

Type *
-- choose an option --

Title *

Comments *

Share this Progress Note

Attachment

Create **Cancel**

Choose Your Name

Progress Note (Only Choice)

Descriptive Title + Date (to help locating information easy)

Relevant Comments regarding performance

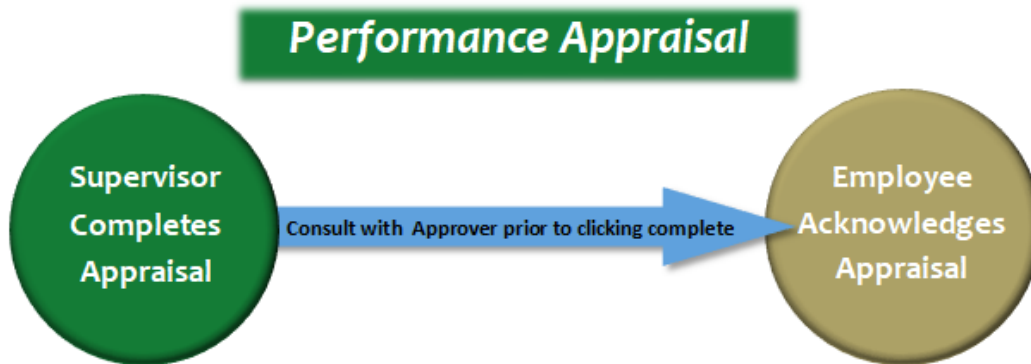
Click Share button to share with supervisor

Click to add attachment

EHRA Performance Management

The *UNC Charlotte Employee Portal* is used to: 1) **Complete** an EHRA Appraisal; and to 2) **Document** performance feedback (Progress Notes).

EHRA Annual Review Process Steps



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

Employee Completes Self-Appraisal (or Self Evaluation)

(Video available)

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



The purpose of the Self-appraisal is to provide an honest reflection of your performance over the past year and start a conversation with your supervisor.

This reflection process is intended to:

- Highlight what you did well and what could have gone better,
- Consider obstacles that prevented you from performing as well as you wished,
- Identify priorities and goals you would like to focus on in the coming year, and
- Think about what support you will need to achieve those goals.

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

Your supervisor may attach your self-appraisal to your appraisal document in the NinerTalent system.

Employee Acknowledges EHRA Appraisal

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

NinerTalent

[Click here to log in with your UNCCharlotte NinerNet credentials](#)

Guest User Login:

The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNet credentials.

USERNAME

PASSWORD

UNC CHARLOTTE Web Authentication @ UNC Charlotte

NinerNET ID:

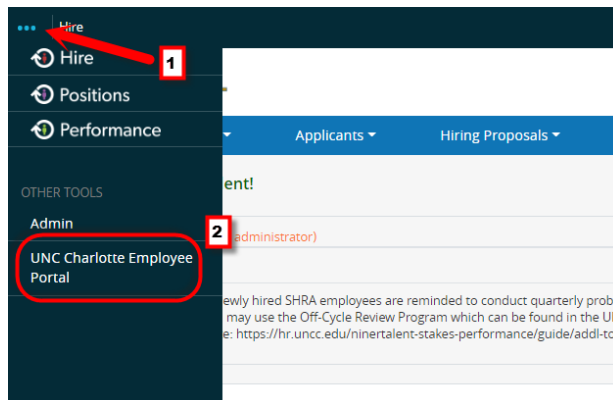
Password:

[Forgot your password?](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security.

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.

When you reach the UNC Charlotte Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention. Note any due date(s) indicated.

'Item' indicates the review type (Annual Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To review your supervisor's evaluation of your performance, select item link that that corresponds with the action **'Employee Acknowledges Appraisal'**.

Item	Description	Due Date	Status
2018-2019 EHRA Performance Evaluation for Katherine Tomey	Employee Acknowledges Appraisal	n/a	Available



When you choose 'Employee Acknowledges Appraisal' the following screen will appear. You will see your overall performance rating at the top right of the screen. (This rating is valid in all instances **EXCEPT** if you have a rating of "Exceeding Expectations" and have a disciplinary action in the current cycle that was not properly reflected in your appraisal.)

Supervisor Evaluation for Katherine Tomey

Institutional Goals

Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES TO ASSIST YOU WITH NAVIGATING NINERTALENT AND COMPLETING THIS EHRA NF PROCESS ACTION

You can view the employee's position description by clicking the job title under their name at the left of the screen.

Actions ▾

2018-2019 EHRA Performance Evaluation

Review Status: **Complete**

Overall Rating: 7 = Exceeding Expectations

Evaluation Type: Focal

Click the 'Actions' button and Print your appraisal either to a pdf document or on paper so you have a record of the documentation. **DO NOT** Acknowledge or Dispute your plan yet.

Supervisor Evaluation for Katherine Tomey

Institutional Goals

Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES TO ASSIST YOU WITH NAVIGATING NINERTALENT AND COMPLETING THIS EHRA NF PROCESS ACTION

You can view the employee's position description by clicking the job title under their name at the left of the screen.

Actions ▾

Print

Dispute

Acknowledge

2018-2019 EHRA Performance Evaluation

Review Status: **Complete**

Overall Rating: 7 = Exceeding Expectations

Evaluation Type: Focal

When you have completed a review of your evaluation information, type in any comments as necessary in the 'Comments' box at the end of the page and click the 'Acknowledge' or 'Dispute' button.

Comment

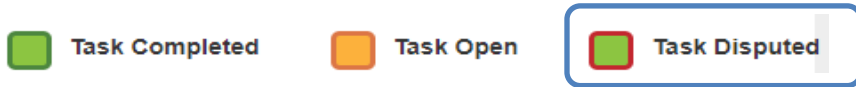
Dispute Acknowledge

Acknowledge or Dispute

Choosing 'Acknowledge' or 'Dispute' brings the Performance appraisal review process to successful completion. The plan may only be revised if the HR Administrator in charge of this process reopens it.



Once you have acknowledged your performance appraisal, the following screen will appear. If you **'Dispute'** the appraisal you will see the **Employee Acknowledgment** step will be outlined in red as seen below.



Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal. They will only be aware of this if you notify them, or if they are looking at the performance dashboard like the one below.

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Appraisal	Cara Consuegra Supervisor	2019-05-01	2019-06-19	2019-07-19
2 Employee Acknowledges Appraisal	Jena Jessup		2019-06-20	2019-08-01

2018-2019 EHRA Performance Evaluation
Review Status: **Complete**
Overall Rating: 7 = Exceeding Expectations
Evaluation Type: Focal
Program Timeframe: 07/01/18 to 06/30/19
Last Updated: June 20, 2019 14:08
Last Completed Step: Employee Acknowledges Appraisal

Returning to the Performance Dashboard

On the screen above, you have access to the Supervisor Evaluation, Approvals & Acknowledgements, and Progress Notes.

You can go back to review your appraisal by clicking the **'Supervisor Evaluation'** link on the left navigation pane on the right. You can print your evaluation by clicking the blue **'Actions'** button in the top right corner of the page to reveal the **'Print'** option.

Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal. They will only be aware of this if you notify them yourself, or if they are looking at the performance dashboard like the one depicted on the previous page.

You can access the approval notes from your Next Level Supervisor and your own "Acknowledgments" by clicking the **'Approvals & Acknowledgements'** link on the next navigation pane.



The screenshot shows the NinerTalent Performance Portal interface. At the top, there is a green header with the NinerTalent logo on the left and navigation links 'Go to UNC Charlotte User Site' and 'PeopleAdmin' on the right. Below the header is a dark navigation bar with 'Home' and 'Performance' menus, and a user greeting 'Hello, Paulette' with a 'Log Out' button. The main content area is divided into three sections: a left sidebar for user information, a central table of 'Approvals & Acknowledgements', and a right sidebar with evaluation details.

Katherine Tomey
Supervisor: Jeanne Madorin
Position Description: Human Resources Consultant
Department: Employee Relations
Overview

Approvals & Acknowledgements

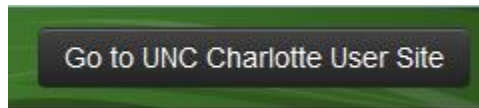
Name	Comments	Decision	Task Owner	Completed On
Employee Acknowledges Performance Plan	No comment given	Acknowledge	Katherine Tomey	11/03/17 09:46:12 AM

2018-2019 EHRA Performance Evaluation
Review Status: **Complete**
Overall Rating: 7 = Exceeding Expectations
Evaluation Type: Focal
Program Timeframe: 07/01/18 to 06/30/19
Last Updated: June 20, 2019 14:08
Last Completed Step: Employee Acknowledges Appraisal

Congratulations!

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

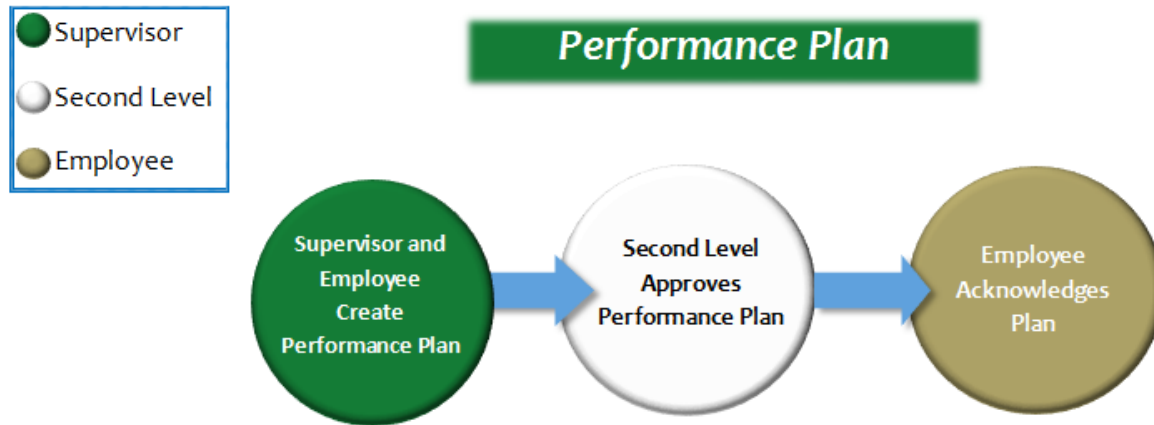
To return to the NinerTalent site, click the 'Go to UNC Charlotte User Site' button in the top right-hand corner.



SHRA Performance Management

The Performance Management module is used to: 1) **Create** a SHRA Performance Plan; 2) **Modify** an existing SHRA Performance Plan; and to 3) **Complete** a SHRA Appraisal.

Performance Plan Process Steps



Employee Acknowledges SHRA Performance Plan

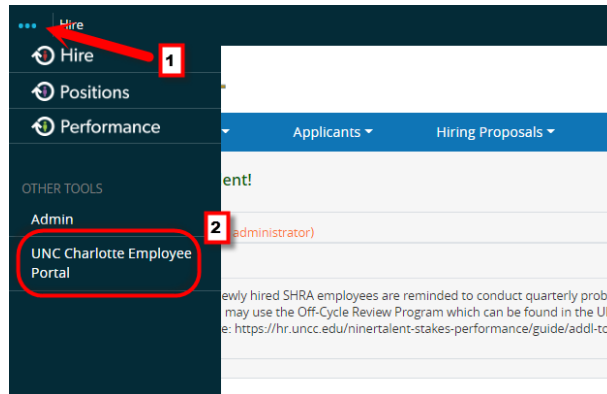
(Video available)

To acknowledge a SHRA Performance Plan, log into NinerTalent (<http://jobs.uncc.edu/hr>) using your Ninernet credentials:

The screenshot shows the NinerTalent login page. A red circle highlights the link: "Click here to log in with your UNCCharlotte NinerNet credentials". Below this, there is a "Guest User Login" section with fields for USERNAME and PASSWORD, and a "Log In" button.

The screenshot shows the "Web Authentication @ UNC Charlotte" page. It features a header with the UNC Charlotte logo and a background image of a building. The login form includes fields for "NinerNET ID" and "Password", a "Log In" button, and a "Forgot your password?" link. A notice at the bottom states: "NOTICE: You MUST close and exit your browser program after log-out to ensure security."

Once logged in, click the '...' in the left hand corner to initiate the dropdown and click 'UNC Charlotte Employee Portal'.



When you reach the UNC Charlotte Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention. Note any 'Due Date(s) indicated.

'Item' indicates the review type (Annual Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To complete click the linked item that corresponds with the **'Employee Acknowledges Performance Plan'** action.

The screenshot shows the NinerTalent Employee Portal interface. At the top, there is a navigation bar with the NinerTalent logo, a 'Go to UNC Charlotte User Site' button, and a 'PeopleAdmin' button. Below the navigation bar, there is a breadcrumb trail: Home > Performance > Progress Notes. The user is logged in as 'Hello, Norm' and 'Hello, Jeanne', with a 'Log Out' button. The main heading is 'Welcome to the Employee Portal, Katherine Tomey'. Below this, there is a 'My Reviews' button. The main content area is titled 'Your Action Items' and contains a search bar with the placeholder text 'Start typing to search'. Below the search bar is a table with the following columns: Item, Description, Due Date, and Status. The table contains one item, which is circled in red:

Item	Description	Due Date	Status
2018-2019 SHRA STAKES Performance Review for Katherine Tomey	Employee Acknowledges Performance Plan		Available



Once selected, the Performance Plan will appear.

Plan for Sarah Ekis

Select "Acknowledge" to indicate that you and your supervisor have discussed your performance plan.

Schedule and Components

Actions ▾

- Print
- Dispute
- Acknowledge

Click the **'Actions'** button and Print your plan either to a pdf document or on paper so you have a record of the documentation. **DO NOT** Acknowledge or Dispute your plan yet.

Review the performance expectations contained in your performance plan (Institutional, Individual, and Career Development Goals) and the evaluation methods that your supervisor plans to use to assess your performance throughout the cycle.

When you are done reviewing your performance plan information, type in any comments as necessary in the 'Comments' box below your plan and click the **'Acknowledge'** or **'Dispute'** button at the bottom of the page. Choosing either button indicates that you have reviewed your performance plan and understand both your work expectations and the evaluation methods that will be used to assess your performance.

If you choose to 'Dispute', please use the 'Comments' box to document your specific disagreement. 'Dispute' indicates that you disagree with some information contained in the plan.

Note: It is recommended that you speak with your supervisor about any dispute prior to submitting it. It may be something that can be resolved before being documented in this permanent record.

Comments

Comment

Enter comments here, as desired and/or necessary |

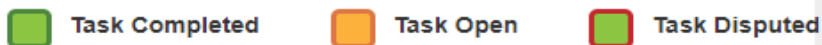
Dispute Acknowledge



Acknowledge or Dispute

Choosing 'Acknowledge' or 'Dispute' brings the Performance plan review process to successful completion. The plan may only be revised if the HR Administrator in charge of this process reopens it.

Once you have acknowledged your performance plan, the following screen will appear. If you 'Dispute' the plan you will see the Employee Acknowledgment step will be outlined in red as seen below.



Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your plan. They will only be aware of this if you notify them yourself, or if they are looking at the performance dashboard like the one below.

Returning to the Performance Dashboard

NinerTalent | Go to UNC Charlotte User Site | PeopleAdmin

Home 2 | Performance ▾ | Hello, Charlotte | Log Out

Norm Niner
Supervisor: Charlotte College
Position Description: Human Resources Consultant
Department: Employee Relations

Click link to access current Position Description

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Performance Plan Creation	Charlotte College Supervisor	2017-05-29	2017-10-05	2017-07-14
2 Next Level Supervisor Approves Performance Plan	Dean Manager Reviewing Officer		2017-11-02	2017-07-21
3 Supervisor/Employee Performance Plan Meeting	Charlotte College Supervisor		2017-11-06	2017-07-28
4 Employee Acknowledges Performance Plan	Norm Niner		2017-11-06	2017-08-04
5 Employee Self-Appraisal	Norm Niner	2018-03-01		2018-04-13
6 Supervisor Appraisal	Charlotte College Supervisor			2018-05-01
7 Next Level Supervisor Approves Appraisal	Dean Manager Reviewing Officer			2018-05-08
8 Supervisor/Employee Appraisal Review Meeting	Charlotte College Supervisor			2018-05-11
9 Employee Acknowledges Appraisal	Norm Niner			2018-05-15

2017-2018 SHRA STAKES Review
Review Status: Open
Evaluation Type: Focal
Program Timeframe: 04/01/17 to 03/31/18
Last Updated: November 06, 2017 15:42
Last Completed Step: Employee Acknowledges Performance Plan

Overview
Plan
Supervisor Evaluation
Self Evaluation
Approvals & Acknowledgements
Progress Notes
History
My Reviews
My Employees' Reviews
Program Information

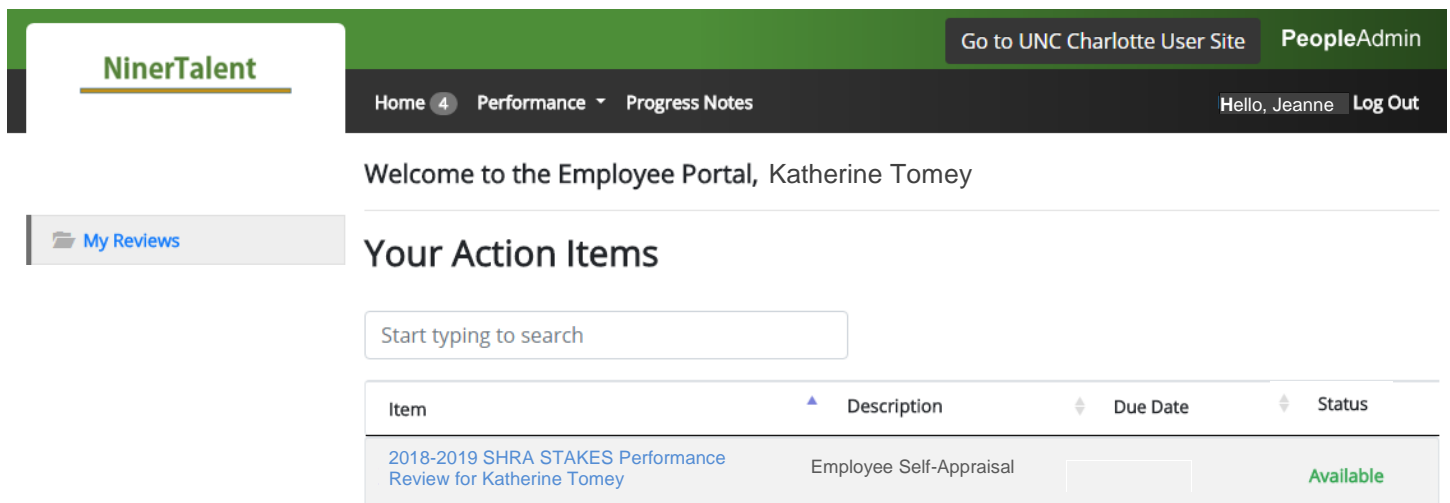
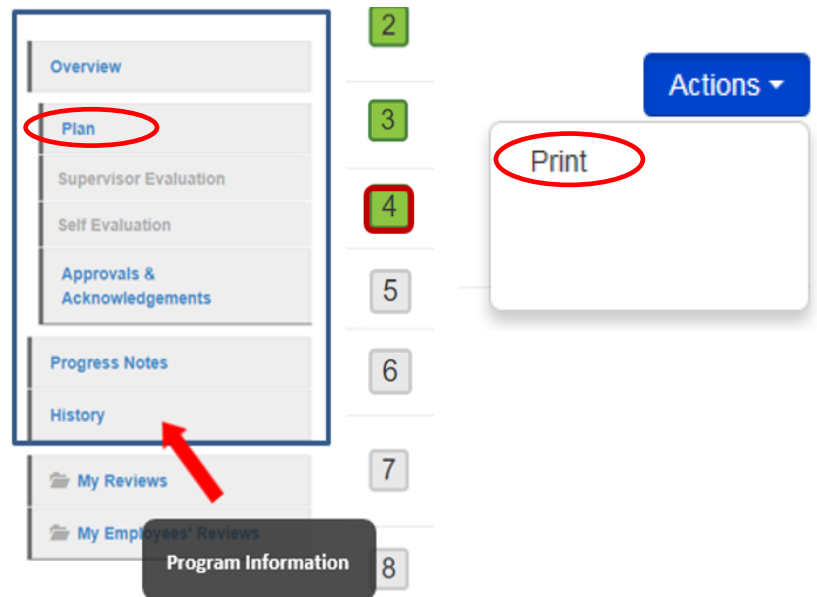


On this screen, you may review your Plan, your Approvals & Acknowledgements, and add Progress Notes.

You can get back to the print option by clicking the 'Plan' tile. When your plan opens, click the blue 'Actions' button in the top right corner of the page to reveal the 'Print' option.

Also, please note, once your performance plan has been through the acknowledgement process, the Employee Self-Appraisal may appear in 'Your Action Items' box as seen below. This should not appear until March 1. Please do not complete this action early if it appear in your queue prior to March 1.

Note: The employee self-appraisal is the first step of your annual evaluation and is not due to be started & completed until the end of March (which is the last month in the performance cycle).



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

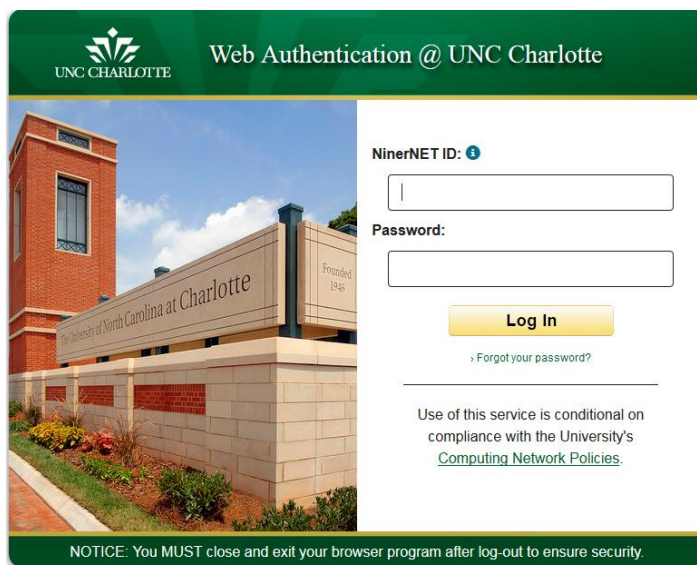
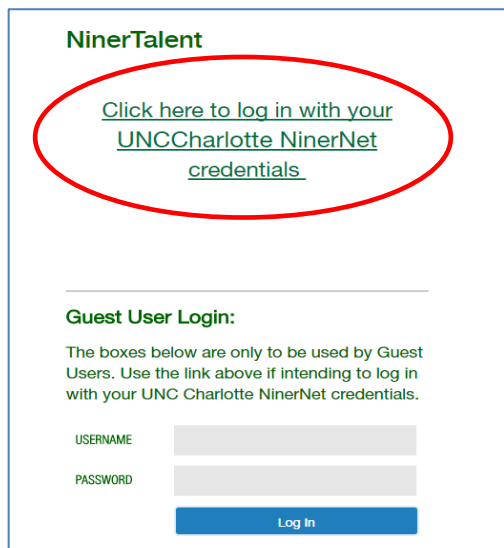




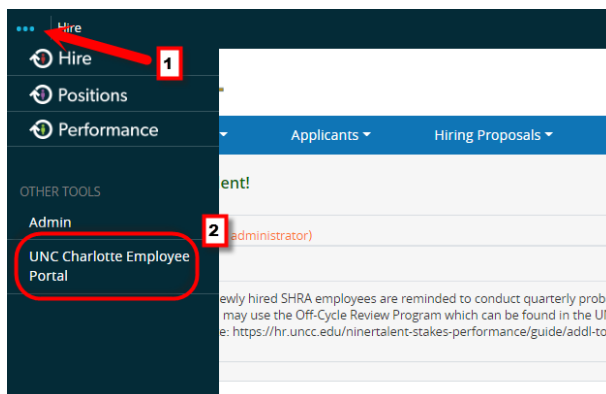
SHRA Off-Cycle Reviews

Off-cycle reviews are any documented performance reviews that are not the annual appraisal/evaluation. These reviews are to help keep you informed of how you are doing in terms of performance throughout the cycle by letting you know if you are meeting or not meeting expectations. It is also a time for you to get clarification and guidance on any performance expectations set forth in your performance plan at the beginning of the cycle.

To acknowledge an Off-Cycle Review, log into NinerTalent (<http://jobs.uncc.edu/hr>) using your Ninernet credentials:



Once logged in, click the '...' in the left hand corner to initiate the dropdown and click 'UNC Charlotte Employee Portal'.





When you reach the UNC Charlotte Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention. (Remember, the self-appraisal should not be started until March (end of cycle)).

To complete the off-cycle review action, select the linked item that corresponds with **'Employee Acknowledges Off-Cycle Review'**.

The screenshot shows the NinerTalent Employee Portal interface. At the top, there is a navigation bar with the NinerTalent logo, a search bar, and links for 'Go to UNC Charlotte User Site' and 'PeopleAdmin'. Below the navigation bar, there is a breadcrumb trail: 'Home > Performance > Progress Notes'. The user is identified as 'Hello, Jeanne' with a 'Log Out' button. The main content area displays a welcome message: 'Welcome to the Employee Portal, Katherine Tomey'. Below this, there is a 'My Reviews' sidebar and a 'Your Action Items' section. A search bar is present above a table of action items. The table has columns for 'Item', 'Description', 'Due Date', and 'Status'. One item is listed: '2018-2019 Off-Cycle Reviews for Katherine Tomey' with a description of 'Employee Acknowledges Off - Cycle Review', a due date of 'n/a', and a status of 'Available'. The item name is circled in red.

Item	Description	Due Date	Status
2018-2019 Off-Cycle Reviews for Katherine Tomey	Employee Acknowledges Off - Cycle Review	n/a	Available

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

Plan

Actions

Select "Acknowledge" to indicate that you and your supervisor have discussed your performance progress up to this point in the evaluation cycle.

Appraisal Criteria

The screenshot shows the 'Appraisal Criteria' section of the portal. It contains the following information:

- Date:** 2017-04-19
- Review Type:** Other
- Rating:** Meeting Expectations
- Comments:** Keep up the good work.



When you have finished going over your off-cycle review, type in any comments as necessary in the 'Comments' box and click the 'Acknowledge' or 'Dispute' button at the bottom of the page. By clicking either button, you are indicating that you have reviewed and understand the information inputted in the off-cycle review. Either action will bring this action to a close.

Comment

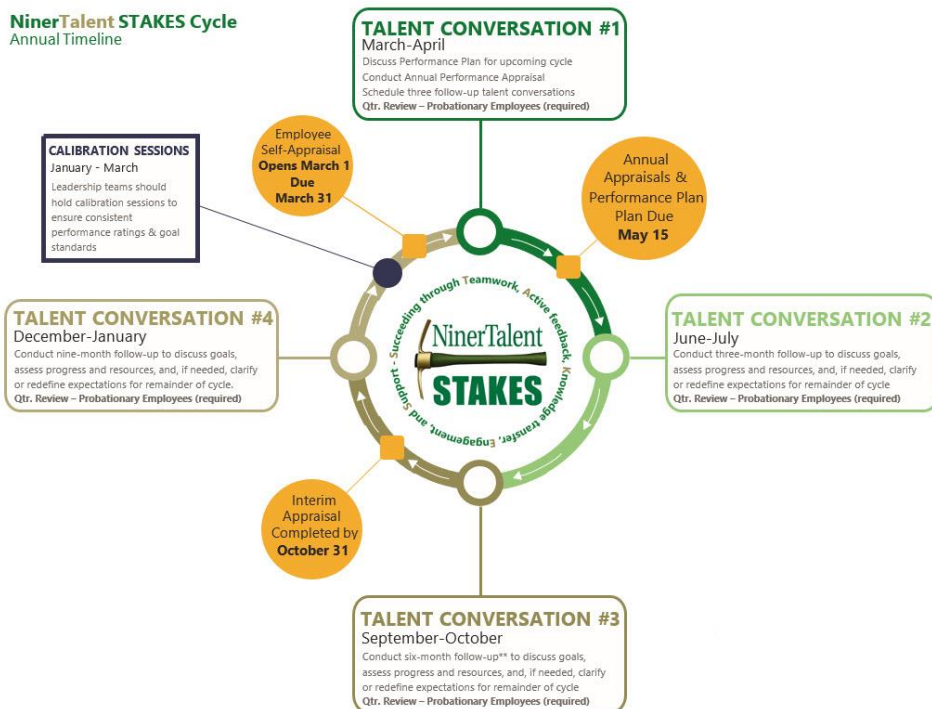
Enter comments here, as desired and/or necessary |

Dispute Acknowledge

Note: You may request an employee-requested review from your supervisor once a year if you have not had a documented review (annual appraisal or off-cycle review/talent conversation) in the last 60 days.

For **probationary employees**, **probationary reviews** (or off-cycle reviews) are **required quarterly** (April, July, October, and January). These reviews should follow the timeline of the Talent Conversations in the NinerTalent STAKES Cycle.

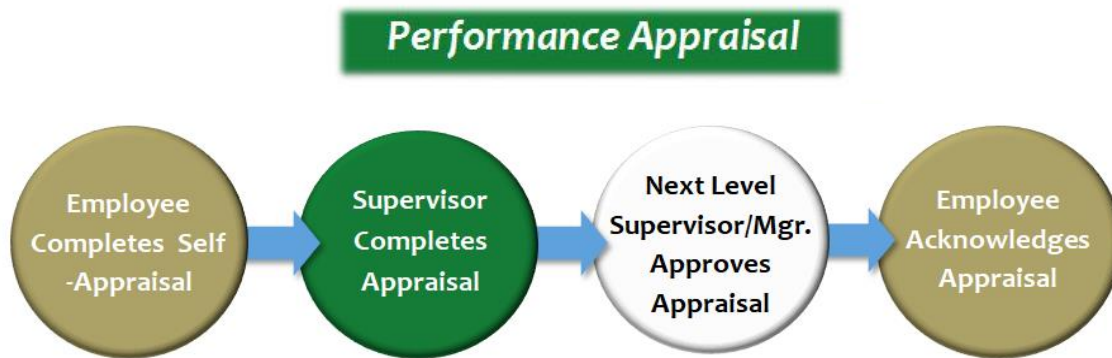
NinerTalent STAKES Cycle Annual Timeline



For **permanent employees**, off-cycle reviews may occur **three (3) times a year** (July, October, January). This includes:

- Quarterly check-in for July
- Interim review in October **(required if you received a disciplinary action in the current cycle or had any rating of "not meeting expectations" in the last performance cycle)**
- Quarterly check-in for January

SHRA Annual Appraisal Process Steps



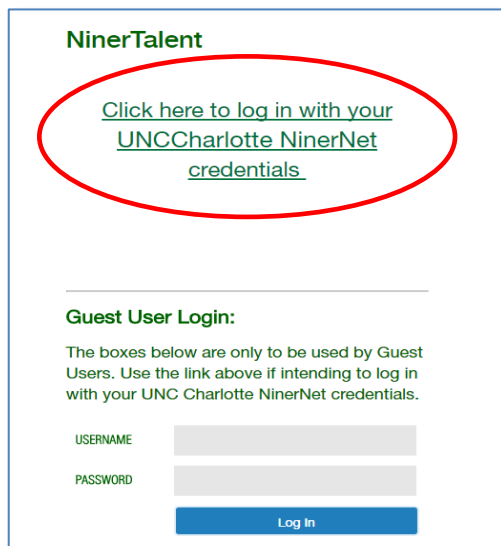
*Reference Progress Notes and/or Off-Cycle Reviews as necessary when completing your self-appraisal

Employee Completes Self-Appraisal (or Self Evaluation)

(Video available)

During the last month of the annual evaluation period, March, you will be prompted by a system-generated email message and/or your supervisor to begin the Employee Self-Appraisal (also referred to as the Self Evaluation).

To begin the Self-Appraisal, log into NinerTalent (<http://jobs.uncc.edu/hr>) using your NinerNet credentials:



NinerTalent

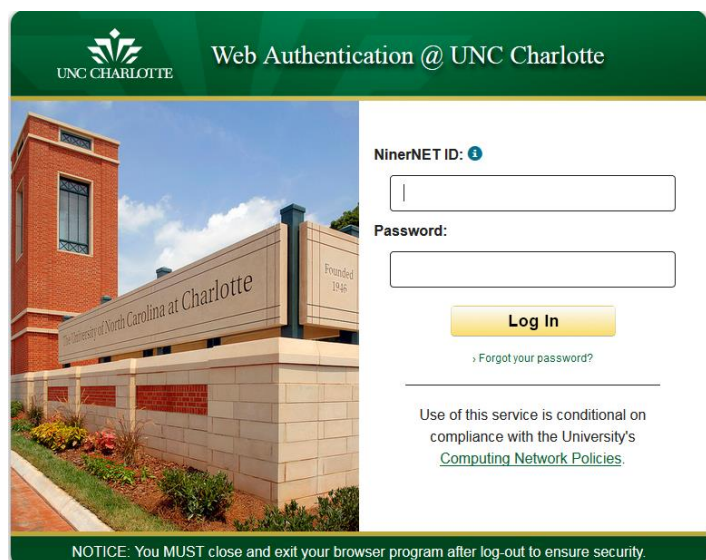
[Click here to log in with your UNCCCharlotte NinerNet credentials](#)

Guest User Login:

The boxes below are only to be used by Guest Users. Use the link above if intending to log in with your UNC Charlotte NinerNet credentials.

USERNAME

PASSWORD



UNC CHARLOTTE Web Authentication @ UNC Charlotte

NinerNET ID:

Password:

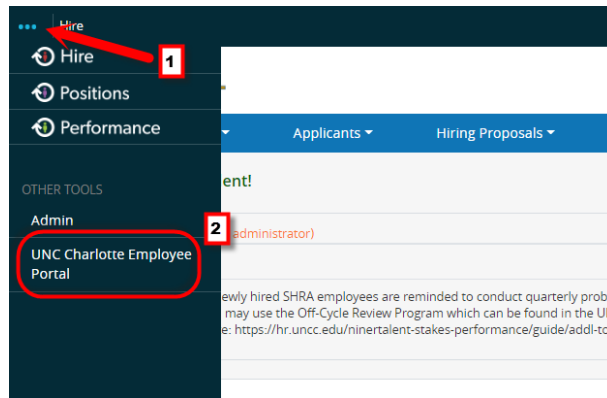
[Forgot your password?](#)

Use of this service is conditional on compliance with the University's [Computing Network Policies](#).

NOTICE: You MUST close and exit your browser program after log-out to ensure security.



Once logged in, click the '...' in the left hand corner to initiate the dropdown and click **'UNC Charlotte Employee Portal'**.



When you reach the UNC Charlotte Employee Portal, the first screen you will see is 'Your Action Items'. This will be a list of items that require your attention. Note any due date(s) indicated.

'Item' indicates the review type (Annual Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To create an Employee Self-Appraisal, select the description title that reads **'Employee Self-Appraisal'**, or click the blue **'View'** button corresponding to the appropriate process step.

Item	Description	Due Date	Status
2018-2019 Off-Cycle Reviews for Katherine Tomey	Employee Self-Appraisal		Available



Once selected, the “Employee Self-Appraisal” or Self Evaluation will appear. Note: There are five (4) tab sections that make up the Self Evaluation.

The first tab section is the ‘Personal Self-Assessment’. You will see information on the purpose of the evaluation process then four questions total regarding your performance in the past cycle and your goals for the future. These questions were selected specifically to help you put in your own words how you feel you performed in this cycle and what you would like to achieve for the upcoming cycle.

Personal Self-Assessment Career Development Plan Overall Performance Attachments

****Click [HERE TO FIND VIDEO TUTORIALS AND GUIDES ON HOW TO COMPLETE THIS PERFORMANCE PROCESS](#)****

The purpose of the Self-appraisal is to provide an honest reflection of your performance over the past year and start a conversation with your supervisor.

This reflection process is intended to:

- Highlight what you did well and what could have gone better,
- Consider obstacles that prevented you from performing as well as you wished,
- Identify priorities and goals you would like to focus on in the coming year, and
- Think about what support you will need to achieve those goals.

Personal Self-Assessment for Previous Year

Please answer the questions in this section.

****Do not click "Remove Entry".****

* What do you think you did well this year? What are you the most proud of?

* What do you feel you could have done better? Did you encounter obstacles that prevented you from doing as well as you had hoped?

Remove Entry?

Personal Self-Assessment for Upcoming Year

Please answer the questions in this section.

****Do not click "Remove Entry".****

* What are your priorities for the upcoming year?

* What personal or professional goals do you want to achieve this year? What support do you need to achieve those goals?

Remove Entry?



When you reach the bottom of the page and have completed the 'Personal Self-Assessment', you may click '**Save Draft**' or '**Next**'. Choosing the 'Save Draft' button will allow you to come back and complete the evaluation at a later point in time. Choosing the 'Next' button will move you forward to the next tab section.

Note: Choosing the 'Next' button will enable auto save for the work just completed. Once you have completed the personal self-assessment, select '**Next**' to go to the Career Development Plan tab. Career development activities are not rated, but you have the option to add comments.

[Introduction](#) [Personal Self-Assessment](#) [Career Development Plan](#) [Overall Performance](#) [Attachments](#)

Career Development Activities

Please add any comments regarding the professional development activities you engaged in this year.

Career Development Activity:

on work policies, standards and expectations for the unit. Organizational units include application development and management, database management, enterprise imaging, workflow and security and access privileges.

Comments

[Save Draft](#) [Next >](#)

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

[Introduction](#) [Personal Self-Assessment](#) [Career Development Plan](#) [Overall Performance](#) [Attachments](#)

Please enter comments regarding your overall performance this year.

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

Overall Performance Comments

Overall Performance Comments

[Save Draft](#) [Complete](#)

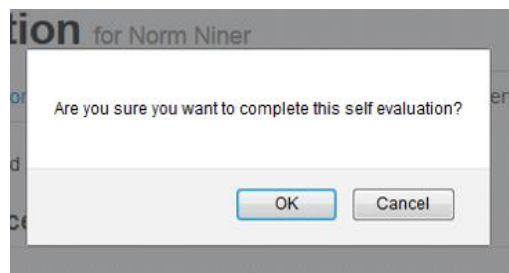


If you would like to add any attachments before completing the appraisal, first click **'Save Draft'** and then go to the **'Attachments'** link and upload that information.

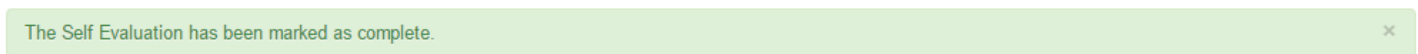
Note: Attachments must be in PDF format.



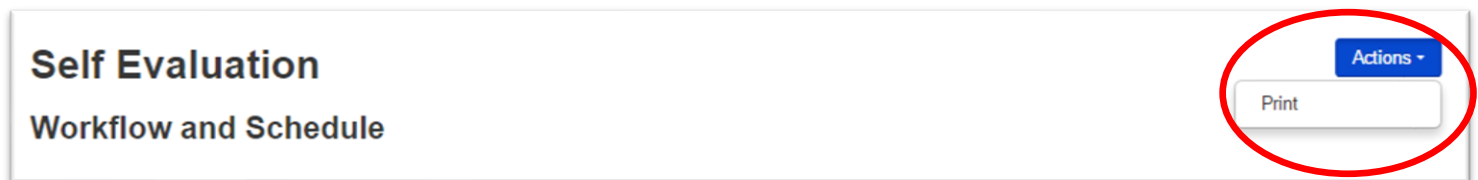
When you select the **'Complete'** button, the following warning screen will appear. Please ensure all necessary information has been entered/completed prior to clicking 'OK'.



Once you have marked your Employee Self Evaluation as complete, the following will appear at the top of your screen if you have completed all required fields.



If you would like to Print your Self Evaluation you can do so by clicking the blue **'Action'** button at the top of the page and selecting **'Print'**.



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



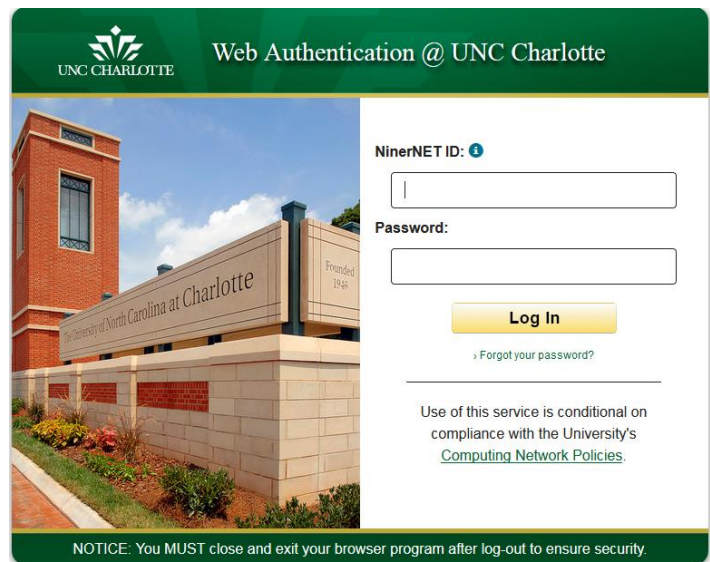
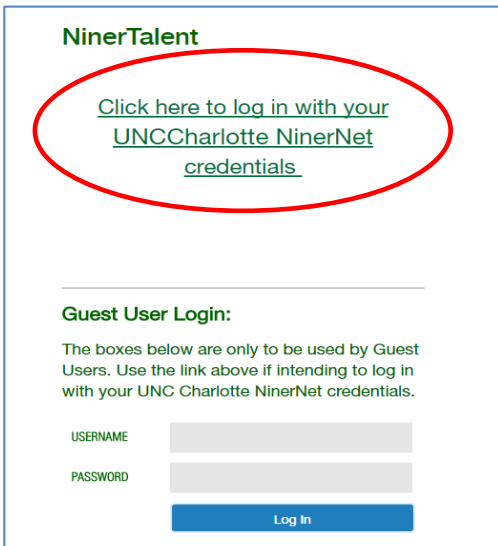




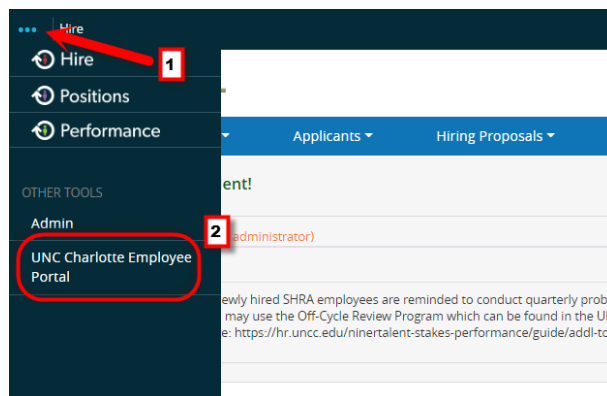
Employee Acknowledges Appraisal (or Evaluation)

(Video available)

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



Once logged in, click the '...' in the left hand corner to initiate the dropdown and click 'UNC Charlotte Employee Portal'.





When you reach the UNC Charlotte Employee Portal, the first screen you will see is **'Your Action Items'**. This will be a list of items that require your attention. Note any due date(s) indicated.

'Item' indicates the review type (Annual Performance Review, Off-Cycle Review, etc.). 'Description' indicates the current process step and/or required action. To review your supervisor's evaluation of your performance, select item link that that corresponds with the action **'Employee Acknowledges Appraisal'**.

Item	Description	Due Date	Status
2018-2019 Off-Cycle Reviews for Katherine Tomey	Employee Acknowledges Appraisal	n/a	Available

When you choose 'Employee Acknowledges Appraisal' the following screen will appear. You will see your overall performance rating at the top right of the screen. (This rating is valid in all instances **EXCEPT** if you have a rating of "Exceeding Expectations" and have a disciplinary action in the current cycle that was not properly reflected in your appraisal.)

Supervisor Evaluation for Katherine Tomey

Workflow and Schedule

Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES ON HOW TO COMPLETE THIS PERFORMANCE PROCESS

Supervisor

2017-2018 SHRA STAKES Review

Review Status: Complete

Overall Rating: Exceeding Expectations

Click the **'Actions'** button and Print your appraisal either to a pdf document or on paper so you have a record of the documentation. **DO NOT** Acknowledge or Dispute your plan yet.

Supervisor Evaluation for Katherine Tomey

Workflow and Schedule

Click [HERE](#) TO FIND VIDEO TUTORIALS AND GUIDES ON HOW TO COMPLETE THIS PERFORMANCE PROCESS

Supervisor

2017-2018 SHRA STAKES Review

Review Status: Complete

Overall Rating: Exceeding Expectations

Actions

- Print
- Dispute
- Acknowledge



When you have completed a review of your evaluation information, type in any comments as necessary in the 'Comments' box at the end of the page and click the '**Acknowledge**' or '**Dispute**' button.

Comment

Acknowledge or Dispute

Choosing '**Acknowledge**' or '**Dispute**' brings the Performance appraisal review process to successful completion. The plan may only be revised if the HR Administrator in charge of this process reopens it.

Once you have acknowledged your performance appraisal, the following screen will appear. **If you 'Dispute' the appraisal you will see the Employee Acknowledgment step will be outlined in red as seen below.**

Task Completed Task Open Task Disputed

Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal. They will only be aware of this if you notify them, or if they are looking at the performance dashboard like the one below.

Returning to the Performance Dashboard



On the screen above, you may review your Plan, your Approvals & Acknowledgements, and add Progress Notes.

You can go back to review your appraisal by clicking the **'Supervisor Evaluation'** link on the left navigation pane on the right. You can print your evaluation by clicking the blue **'Actions'** button in the top right corner of the page to reveal the **'Print'** option.

Note: Emails are not sent to your supervisor informing them you have acknowledged or disputed your appraisal. They will only be aware of this if you notify them yourself, or if they are looking at the performance dashboard like the depicted on the previous page.

You can access the approval notes from your Next Level Supervisor and your own "Acknowledgments" by clicking the **'Approvals & Acknowledgements'** link on the next navigation pane.



NinerTalent [Go to UNC Charlotte User Site](#) [PeopleAdmin](#)

Home Performance ▾ Hello, Paulette Log Out

Katherine Tomey
Supervisor: Jeanne Madorin
Position Description: [Human Resources Consultant](#)
Department: Employee Relations

Overview
Plan
Supervisor Evaluation
Self Evaluation
Approvals & Acknowledgements
Progress Notes
My Reviews

Approvals & Acknowledgements

Name	Comments	Decision	Task Owner	Completed On
Employee Acknowledges Performance Plan	No comment given	Acknowledge	Katherine Tomey	11/03/17 09:46:12 AM

2017-2018 SHRA STAKES Review
Review Status: Open
Evaluation Type: Focal
Program Timeframe: 04/01/17 to 03/31/18
Last Updated: November 03, 2017 09:46
Last Completed Step: Employee Acknowledges Performance Plan

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.

