



EmployeeConnect Performance Review Manual

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Terminology

Performance Review	The parameters and standard metrics that define the structure of how performance will be measured for the relevant period.
Performance Appraisal	The tool used to measure and assess an individual's performance. It is a worksheet made up of the standard metrics defined on the Performance Review and modified to suit the individual.
Appraisal Worksheet	The Appraisal form on which appraisal activity and comments are recorded by the Participant and the Evaluator.
Current Appraisals	All appraisals where the Overall Review Status has not been set to 'Closed' on the Performance Review Setup form.
Historical Appraisals	All appraisals where the Overall Review Status has been set to 'Closed' on the Performance Review Setup form.
Participant	The person who's performance is being assessed.
Evaluator	The person who assesses the performance of the Participant(s).

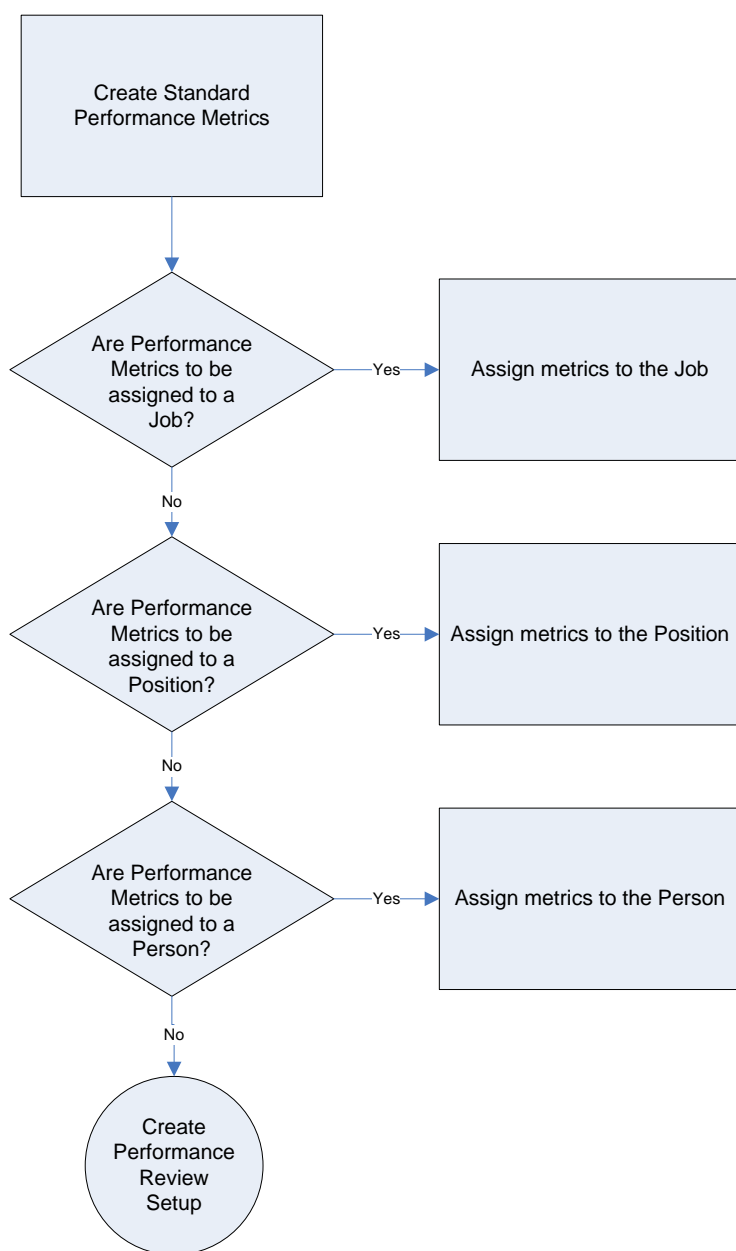
Performance Metrics

Metrics are used in three different areas within Cirrus.

- Organisation – Associated with positions and jobs. Used as the list of competencies required to perform the job
- Performance – Associated with positions, jobs and people. Used as the goals/KPIs/objectives that an individual needs to achieve.
- Training – Associated with training courses. Used as the competencies that will be achieved by undertaking the training.

This section will concentrate on the use of metrics in the Performance module.

Process Diagram for Performance Metric Creation and Assignment



Performance metrics are added to a participant's performance appraisal when they are:

- Assigned to their job or position (see the Organisation section of the manual)
- Assigned to a specific participant
- Attached to the performance review template metrics (see below)
- Added to the participant's performance appraisal via the library of metrics (see below)
- Created for a specific participant within their appraisal (see below)

Creating a Performance Metric

Go to Modules > Performance > Metric > Add Metric

PERFORMANCE > METRIC LIBRARY > EDIT



Metric

Metric ID:

Metric Name: *

Detail | Proficiency

Description

Classification

Type:

Sub Type:

Group:

Class:

Scope: Organisation
 Performance
 Training

Assessment

Assessment Type:

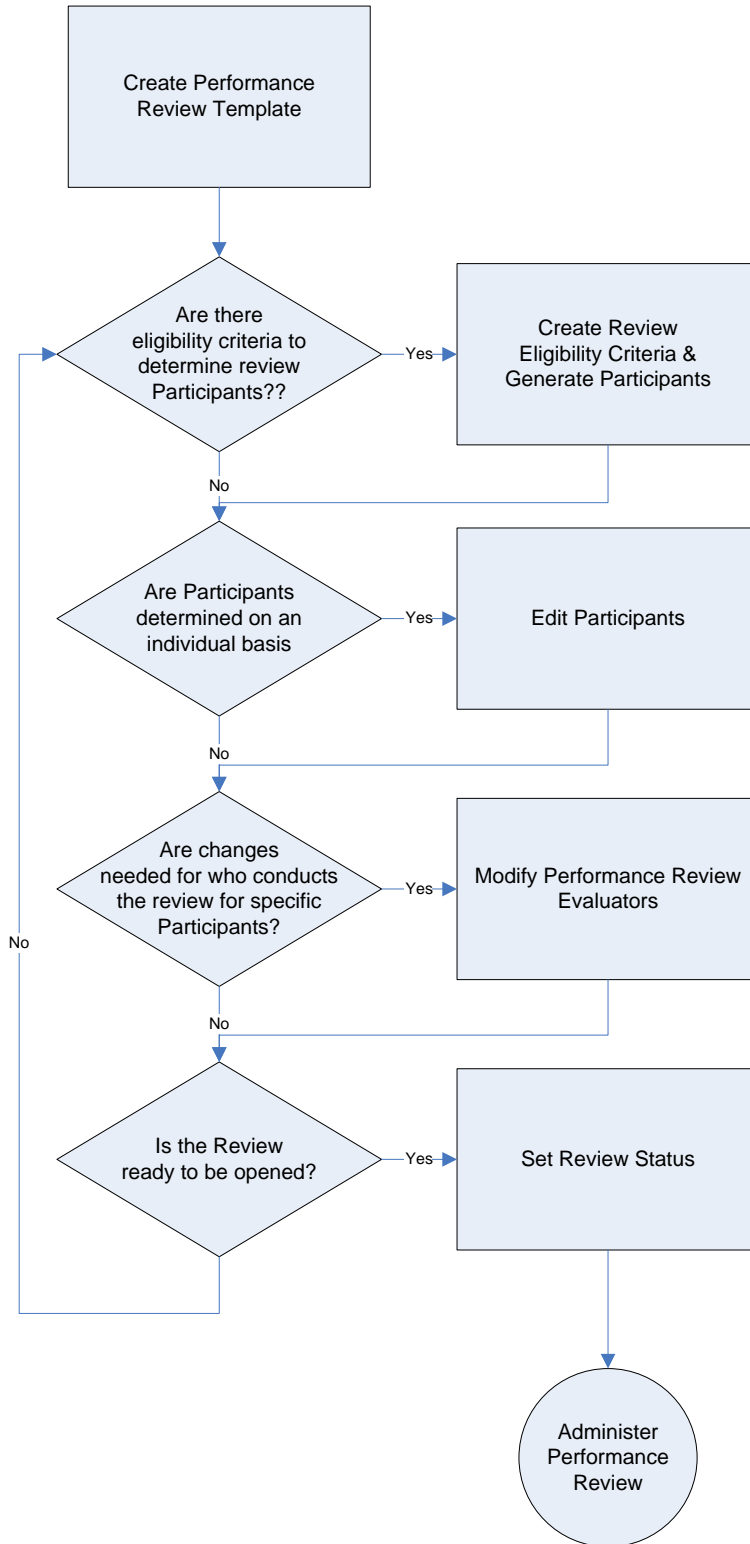
Weighting:

- Metric ID** A numeric value unique to this metric (Note: use a large number or prefix your metrics with an alpha character to ensure it will not cause an issue later)
- Metric Name** A short name to identify the metric
- Description** SMART definition for the metric
- Type** Objective, Goal, KPI, Skill, Development, and Competence are the metric types that are used in the performance module.
- Sub-Type** A list of all options defined for list value type “MetricSubType” where the parent code is one of the above “MetricType” values. This is not a required field.
- Group** Add a group from the list box if appropriate. Options are for list value type “MetricGroup”. This is not a required field.

Class	Select 'Library' if this metric is to appear in the Metric Library for this metric type.
Scope	Check 'Performance' in order for this metric to be used in performance reviews. More than one value can be checked if the metric is also to be used in organisation or training.
Assessment Type	This field is not relevant for use within the performance module.
Weighting	Set the weighting for the metric so it can be used in calculating the section and overall score of the performance appraisals.
Proficiency	The performance module does not use the proficiency levels at this time. This section relates to competency metrics so you can set different levels (e.g., beginner, intermediate, advanced, expert or low, medium, high).

Creating the Performance Review

Process Diagram for Performance Review Setup




Review Template

The review template determines how the appraisal worksheet will look and how the participant, evaluator, and 360 reviewers will interact with each tab in the worksheet.

Creating/modifying a review template

Go to Modules > Performance > Setup > Review Template


Click on the  at the bottom of the Performance Review Template report to create a new review template.


Performance Review Template

Search  Clear Search  Advanced


Edit	Copy	Review ID	Review Name	Type	Class	Status
		2014e	2014 Annual Employee Review	Manager	Annual	
		2014x	2014 Executive Review	Manager	Annual	
		2013a	2013 Annual Review	Manager	Annual	
		2015e	2015 Annual Employee Review	Manager ▼	Annual ▼	

Rows 1 to 3 of 3

Add the information in the newly created row in the report and click on  icon to save the record.

Click on the  icon alongside an existing review record to copy the details into a new review template. Please note that the copy feature only copies the review template; it does not copy the linked metrics for the template.

Note that the values under Type and Class are labels only. Choosing the review type of 360 means that participants and evaluators will choose 360 reviewers during the appraisal process. There is no difference to the review setup or function based on the review class options.

Click on the  icon to open the Performance Review Template and setup the structure for the appraisal worksheet.

PERFORMANCE > REVIEW TEMPLATE > EDIT



Performance Review Template

Review ID: 2015e
 Review Name: 2015 Annual Employee Review

Instructions
Key Performance Actions
Tab 3
Tab 4
Tab 5
Tab 6
Tab 7
Summary

Tab 2

Tab 2:

Name 2:

Type 2:

Form Type 2:

Self-Rate 2:

Rating 2:

Total Rating 2: None Total Average

Section Weighting 2:

Show Comments during Review 2:

Show Ratings during Review 2:

Info 2:

KPI Metric

Metric	Type	Group
+ Rows 0 to 0 of 0		

The Performance Review Template form consists of 8 Tabs. Each tab on the form corresponds to a tab on the appraisal worksheet.

- Introduction (Tab 1) Used to provide review instructions and information (MANDATORY)
- Tab 2 – 7 Used to display different types of metrics on the appraisal worksheet
- Summary (Tab 8) Used to provide overall rating and comments as well as signifying that the Appraisal is complete (MANDATORY)

Tab Fields

The fields on each tab are the same and function as described below.

Tab Leaving this field blank will remove the tab from the appraisal worksheet. Choose the number available in the drop-down list to include the tab (as shown above).

Name	The name of the tab as it is to appear in the appraisal worksheet. The text you enter will replace the text “Tab #” in the header of this form, also, as shown in the screen image on the previous page.
Type	The type of metric to be displayed on Tabs 2 through 7 of the appraisal worksheet. Values are KPI, OBJECTIVE, SKILL, GOAL, COMPETENCE and DEVELOPMENT. Note that not all Types have to be used, but each type must only be used once.
Form Type	The type of interaction that the participants and evaluators will have with each metric on the appraisal worksheet. See below for definitions of each Form Type.
Self Rate	Check this if the Participant is to rate themselves where a Rating Form Type is selected.
Rating	Comma-separated text to be included as the rating options for the tab where a Rating Form Type is selected. Be sure that there are no spaces after each comma. For example: 1,2,3,4,5 or 1=Excellent,2=Above Average,3=Average,4=Below Average,5=Poor
Total Rating	Choose “None” if the tab is not scored. Choose “Total” for a score calculated as the sum of the ratings of each metric on the tab. Choose average if the score is the average of the ratings of each metric on the tab.
Section Weighting	Define the numeric weighting (between 0 and 100) for the tab. This weighting is applied to the score for the tab when determining the overall score. Leave it blank if there is no weighting or if the tab is not scored.
Show Comments during Review	Check the box if you want comments for metrics on the tab to display to the participant and evaluator prior to the completion of the review.
Show Ratings during Review	Check the box if you want ratings for metrics on the tab to display to the participant and evaluator prior to the completion of the review.
Info	Information that is to appear at the top of the tab. This can be formatted using HTML.
Metric	An embedded report that allows metrics from the library to be added. These metrics will be assigned to every review Participant. Note that the relevant metrics have to be created in the Metric area first. Also note that the Performance Review Template has to be saved after the “Type” field has been populated in order for the metrics to be displayed. The metrics will appear on the appraisal worksheet in the same sequence that they appear here.

Form Type Definition

The names of Form Types describe the standard components used within that form and which will govern how the Participant and the Evaluator interact with that tab on the appraisal worksheet.

- Comments** Comments can be made by both the participant and the evaluator.
- Add New** An “Add New” button will appear at the bottom of the tab which allows new free text metrics to be added.
- Library** A “Library” button will appear at the bottom of the tab which allows a standard metric from the library to be added.
- Rating** Provides a drop-down list to select the rating for each metric. Option values are those entered in the “Rating” field for the tab on the Performance Review Template form.
- Weighting** Displays the weighting value that is entered against the standard metric. Editing of the weighting for added metrics is allowed when the performance worksheet is in edit mode.
- Target + Completion** Adds a “Target Date” field and a “Completion Date” field to each metric. The fields are editable by the person who added the metric.
- Radio Group Rating Only** Only the titles of the metrics are displayed and a rating scale based on the option values listed in the “Rating” field for the tab.

Before

PERFORMANCE > REVIEW TEMPLATE > EDIT

Performance Review Template

Review ID: 2014b
Review Name: 2014 Blank Review

Introduction | **Tab 2** | Tab 3 | Tab 4 | Tab 5 | Tab 6 | Tab 7 | Summary

Tab 2

Tab 2
Name 2
Type 2
Form Type 2: Comments + Target + Completion + (Library + Add New)
Self-Rate 2
Rating 2
Info 2

Metric

Metric	Type	Group
+ Rows 0 to 0 of 0		

After

PERFORMANCE > REVIEW TEMPLATE > EDIT

Performance Review Template

Review ID: 2014b
Review Name: 2014 Blank Review

Introduction | **2014 Objectives** | Tab 3 | Tab 4 | Tab 5 | Tab 6 | Tab 7 | Summary

Tab 2

Tab 2
Name 2: 2014 Objectives
Type 2: OBJECTIVE
Form Type 2: Comments + Target + Completion + (Library + Add New)
Self-Rate 2
Rating 2: Outstanding, Met Expectations, Fair, Did not meet Expectations, Poor
Info 2: A performance objective is a specific end result that contributes to the success of the unit or organisation and that an employee is expected to accomplish or produce. Performance objectives provide focus to an employee's work to ensure that his or her actions are directed towards achieving important mission-related outcomes. Performance objectives are not work activities, task descriptions, or responsibilities listed in a performance description.

OBJECTIVE Metric

Metric	Type	Group
Financial Management (Library)	Objective	Library
Team Leadership (Collaborating & Leading)	Objective	Collaborating & Leading
+ Rows 1 to 2 of 2		

Tips

- An appraisal worksheet can have as few as two tabs and as many as eight tabs. The number of tabs is determined by populating the “Tab” field on the Performance Review Template form. Tabs 2-7 are optional.
- The Summary tab is required if participants and evaluators are to mark their appraisal worksheet as being “Complete”. Alternatively an Administrator can mark the Appraisal as “Complete” via Appraisal Overrides.
- A Review template should not be changed once a Review Period has been closed, as any changes will appear in all Worksheets based on that Review template, even closed ones. Instead, a new Review template should be created, or the ‘Copy’ function used, to create a new Review template for each Review Setup.

Review Setup

Modules > Performance > Setup > Review Setup

Creating a Performance Review template automatically creates a new Performance Review Setup record.

PERFORMANCE > REVIEW SETUP

Performance Review Setup

Edit	Review ID	Review Name	Type	Class	Start Date	End Date	Master Status	Participant Status	Evaluator Status
	2014e	2014 Annual Employee Review	Manager	Annual	2014-02-01	2014-12-01	● Closed	Write	Write
	2014x	2014 Executive Review	Manager	Annual	2014-02-01	2014-12-01	● Closed	View	View
	2013a	2013 Annual Review	Manager	Annual	2013-02-01	2013-12-01	● Closed	View	View
	1008	RenoTest	Manager	Annual	2014-02-02	2014-10-28	● Open	Write	Write
	2014d	2014 Documentation Review	Manager	Annual					
+ Rows 1 to 5 of 5									

Click on the edit icon to open the Review Setup form.

Details Tab

PERFORMANCE > REVIEW SETUP > EDIT



Performance Review Setup

Review ID: 2015e
 Review Name: 2015 Annual Employee Review

Detail | Eligibility | Participants | Notification

Review Template

Description:

Type: Manager
 Classification: Annual

Review Period

Period:
 Period Start:
 Period End:
 Review Start:
 Review End:

Previous Review

Period:

Mid Year / Full Year

Perform Mid Year and Full Year in one review

Status

Master Review Status: Pending Open Closed
 Participant Status: NoAccess Setup Read Write View
 Evaluator Status: NoAccess Setup Read Write View
 360 Reviewer Status: NoAccess Setup Write
 Acceptance Status: NoAccess Accept

- Description: Add a Description for the Review
- Type: Choose if the review is undertaken by the Manager or if it is a 360 review
- Classification: Select one of the following: Annual, Mid Year or Probationary
- Period: Select the review period from the drop-down list provided. The option values are those defined for the list value type "PerformancePeriod".
- Period Start: Start date of the review period. Complete this field if no period was selected in the previous field. Use the pop-up calendar to select.
- Period End: End date of the review period. Complete this field if no period was selected above. Use the pop-up calendar to select.

Review Start	Start date of the review. If left blank or set in the past or current date, then the review template is active immediately. If set in the future, the review template remains inactive until the date entered. Use the pop-up calendar to select.
Review End	End date of the review. If left blank, the review template will remain active until and end date is set here. Use the pop-up calendar to select.
Previous Review	Choose a previous period to link to this review template. Any metrics defined as goals from the previous period will appear on the objectives tab. If these metric types are not included in this review template, leave this field blank.
Mid Year/Full Year	Check this box if there are to be separate comments and ratings for mid-year and full-year phases of this review.

Status

The Status fields are used to control access to the appraisal worksheet

Master Review Status – Overrides the Participant/Evaluator status...

- Pending – Admin is setting up the review and no one has access.
- Open – The Participant/Evaluator status is used
- Closed – The review is view only (i.e., document download)

Participant and Evaluator Status – Only applicable if the Master Review Status = Open

- NoAccess – No-one can access the appraisal worksheet
- Setup – Add metrics (and related weightings) to the Worksheet, but not rate/comment
- Read – See the appraisal worksheet but not update
- Write – Edit ratings/comments/weightings to the appraisal worksheet and the metrics therein
- View – Download the review as a Word document. No access to the worksheet itself.

360 Reviewer Status – Only relevant if the Review template has Type defined as 360

- NoAccess – Participant and Evaluator cannot select 360 reviewers
- Setup – Participant and Evaluator can select 360 reviewers (assuming Master Review Status is “Open”).
- Write - Participant and Evaluator can select 360 reviewers. 360 Reviewers can add comments to the performance appraisals that they have been assigned.

Acceptance Status – This relates to the selection made on the Eligibility tab of the Performance Review Setup form. Options are: Supervisor (2-up manager), Org Unit (head of org unit), or Admin.

- NoAccess – Person assigned to complete final acceptance cannot access the performance appraisals.
- Accept - Person assigned can complete final acceptance of the performance appraisals. This is typically after the Participant and Evaluator have completed the appraisal.

Eligibility Tab

PERFORMANCE > REVIEW SETUP > EDIT



Performance Review Setup

Review ID 2015e
 Review Name 2015 Annual Employee Review

- Detail
- Eligibility**
- Participants
- Notification

Eligibility

Eligibility Date

Scope	Assignment	Comments
Company ▼	EmployeeConnect ▼	<input type="text"/>
Rows 0 to 0 of 0		

Acceptance
 Final acceptance of the performance appraisal can be by the Supervisor (Review-Manager's manager), Org Unit Head, or just the Administrator.
 Final Acceptance

Participant Generation
 Regenerating the Participants will remove all Assessments that have not yet begun (but not remove existing Assessments in progress or already completed), and then resolve the participants associated with the Scope and filtered by the Eligibility Date.
 Regenerate Participants

The Eligibility tab is used to allocate Appraisals to Participants in bulk. Participants can also be assigned individually on the Participants tab

On the Eligibility tab enter any criteria that would determine eligible Participants. If no criteria are selected, then all Active employees are eligible.

- Eligibility Date** The date compared to an employee’s Anniversary Date which will determine if they are eligible to participate in the Performance Review. Employees whose Anniversary Date is before or equal to this date are eligible.
- Scope** Select a Scope and the associated Assignment to limit eligible employees. Add multiple scope records to further refine the eligible participant list. Options are: Company, Location, Manager, Org Unit, Position Level, Position Type, and Region
- Final Acceptance** If approval of performance appraisals is required after the Participant and Evaluator complete the appraisal, then select from the available options: Admin (HR/Performance Administrator), Org Unit, or Supervisor (2-up manager).

Regenerate Participants Check this box and save the form to assign a Performance Appraisals to everyone in the eligibility criteria.

Participants Tab

PERFORMANCE > REVIEW SETUP > EDIT



Performance Review Setup

Review ID 2014d

Review Name 2014 Documentation Review

Detail Eligibility **Participants** Notification

Participants

Search Clear Search Advanced

ID	Name	Position	RevID	Reviewer
demo	Hunt, Owen	Director of Medicine	admin	admin

Rows 1 to 1 of 1



Edit Participants

The Participants tab displays the Participants who have been allocated the review.

Click on Edit Participants (at the bottom of the page) to add or delete individual participants

PERFORMANCE > REVIEW SETUP > EDIT > PARTICIPANTS

Performance Review Participants

Search Clear Search Advanced

ID	Name	Position	OrgUnit	Record
<input type="checkbox"/>	1016			⊖
<input type="checkbox"/>	1017			⊖
<input type="checkbox"/>	1018			⊖
<input type="checkbox"/>	1019			⊖
<input type="checkbox"/>	1020			⊖
<input type="checkbox"/>	1021			⊖
<input type="checkbox"/>	1022			⊖
<input type="checkbox"/>	admin		Healthcare	⊖
<input type="checkbox"/>	test05	Bailey, Miranda	Emergency Medicine Consultant	Healthcare ⊖
<input type="checkbox"/>	test03	Freeman, Brooke	Obstetrics Consultant	Healthcare ⊖
<input type="checkbox"/>	demo	Hunt, Owen	Director of Medicine	Healthcare ⊕
<input type="checkbox"/>	test10	Karev, Alex	General Surgeon	Healthcare ⊖
<input type="checkbox"/>	test04	Krypkee, Barry	BioMedical Scientist	Healthcare ⊖
<input type="checkbox"/>	ADDEY1	Montgomery, Addey	Paediatric Surgeon	Healthcare ⊖
<input type="checkbox"/>	SPOTTS1	Potts, Sarah	Emergency Medicine Consultant	Healthcare ⊖
<input type="checkbox"/>	test08	Preston, Burke	Cardiologist	Healthcare ⊖
<input type="checkbox"/>	test02	Rolleston, Boyd	Orthopedic Surgeon	Healthcare ⊖
<input type="checkbox"/>	TKS1	Samuels, TK	Neo Natal Surgical Intern	Healthcare ⊖
<input type="checkbox"/>	test06	Shepherd, Derek	Head of Neuro Surgery	Healthcare ⊖
<input type="checkbox"/>	test07	Torres, Callie	Cardiologist	Healthcare ⊖

Performance Review

Review ID 2014d
 Review Name 2014 Documentation Review
 Type Manager
 Class Annual
 Status
 Participants 1

[Edit Participants](#)
[Add New](#)
[Remove](#)

Note : Removing Participants will delete any associated Appraisal.

Search for Participants, check the box next to the required Participant and click the save icon at the bottom of the report.

- Green symbols indicate allocated appraisals
- Red symbols indicate unallocated appraisals

You can select allocated and unallocated at the same time and saving the report will perform the opposite function.

Click on “Add New” in the right hand pane to filter the participant list to only display those employees who don’t already have this Appraisal assigned to them.

Click the “Remove” link in the right hand pane to filter the Participant list to only display those employees who have already got the review assigned to them.

Notification Tab

Only complete this tab if you want to send a generic email to participants, evaluators, 360 reviewers, or acceptors.

[PERFORMANCE](#) > [REVIEW SETUP](#) > [EDIT](#)



Performance Review Setup

Review ID: 2015e
Review Name: 2015 Annual Employee Review

Detail	Eligibility	Participants	Notification
--------	-------------	--------------	---------------------

Participant Notification

Send

Date

Subject

Body

Evaluator Notification

Send

Date

Subject

Body

360 Reviewer Notification

Send

Date

Subject

Body

Acceptance Notification

Send

Date

Subject

Body

Participants & Evaluators

Modules > Performance > Setup > Participants & Evaluators

PERFORMANCE > PARTICIPANTS EVALUATORS

Performance Review Participant & Evaluators

Search

Participants	Review ID	Review Name	Evaluators	Type	Class	Period	Start Date	End Date	Status
	2014e	2014 Annual Employee Review		Manager	Annual		2014-02-01	2014-12-01	●
	2014x	2014 Executive Review		Manager	Annual		2014-02-01	2014-12-01	●
	2013a	2013 Annual Review		Manager	Annual		2013-02-01	2013-12-01	●
	2015e	2015 Annual Employee Review		Manager	Annual		2015-06-01	2015-12-31	●

Rows 1 to 4 of 4

Use the Performance Review Participants & Evaluators report to add or remove Participants and change the designated Evaluators on Performance Reviews.

Note that participants and evaluators can also be managed via:

- Modules > Performance > Dashboard;
- Modules > Performance > Setup > Review Setup

Click either the icon under Participants or Evaluators to view the members of that group.

PERFORMANCE > PARTICIPANTS EVALUATORS > PARTICIPANTS

Performance Review Participants

Search

ID	Name	Position	RevID	Reviewer
237	ACKROYD, Dan	Senior Customer Service Officer - Laurieton	623	O'NEILL, Rachel
admin	admin		726	726
test10	Alex Karav	POS test10	demo	Hunt, Owen
test04	Barry Krypkee	POS test04	test09	Richard Webber
test02	Boyd Rolleston	POS test02	demo	Hunt, Owen
test03	Brooke Freeman	POS test03	demo	Hunt, Owen
test07	Callie Torres	POS test07	demo	Hunt, Owen
test01	Chris Warner	POS test01	demo	Hunt, Owen
test06	Derek Shepherd	POS test06	demo	Hunt, Owen
demo	Hunt, Owen	Director of Operations	admin	admin
test05	Miranda Bailey	POS test05	demo	Hunt, Owen
test08	Preston Burke	POS test08	demo	Hunt, Owen
test09	Richard Webber	POS test09	demo	Hunt, Owen

Rows 1 to 13 of 13

Performance Review	
Review ID	1008
Review Name	A new test
Type	Manager
Class	Annual
Status	Open
Participants	14

Edit Participants
 Add New
 Remove

Note : Removing Participants will delete any associated Appraisal.

Click on Edit Participants (left hand pane) to add or delete individual participants

PERFORMANCE > REVIEW SETUP > EDIT > PARTICIPANTS

Performance Review Participants

Search Clear Search Advanced

ID	Name	Position	OrgUnit	Record
1016	1016			
1017	1017			
1018	1018			
1019	1019			
1020	1020			
1021	1021			
1022	1022			
admin	admin		Healthcare	
test05	Bailey, Miranda	Emergency Medicine Consultant	Healthcare	
test03	Freeman, Brooke	Obstetrics Consultant	Healthcare	
demo	Hunt, Owen	Director of Medicine	Healthcare	
test10	Karev, Alex	General Surgeon	Healthcare	
test04	Krypkee, Barry	BioMedical Scientist	Healthcare	
ADDEY1	Montgomery, Addey	Paediatric Surgeon	Healthcare	
SPOTTS1	Potts, Sarah	Emergency Medicine Consultant	Healthcare	
test08	Preston, Burke	Cardiologist	Healthcare	
test02	Rolleston, Boyd	Orthopedic Surgeon	Healthcare	
TKS1	Samuels, TK	Neo Natal Surgical Intern	Healthcare	
test06	Shepherd, Derek	Head of Neuro Surgery	Healthcare	
test07	Torres, Callie	Cardiologist	Healthcare	

Performance Review

Review ID 2014d
 Review Name 2014 Documentation Review
 Type Manager
 Class Annual
 Status
 Participants 1

[Edit Participants](#)
[Add New](#)
[Remove](#)

Note : Removing Participants will delete any associated Appraisal.

Search for Participants, check the box next to the required Participant and click the save icon at the bottom of the report.

- Green symbols indicate allocated appraisals
- Red symbols indicate unallocated appraisals

You can select allocated and unallocated at the same time and saving the report will perform the opposite function.

Click on “Add New” in the right hand pane to filter the participant list to only display those employees who don’t already have this Appraisal assigned to them.

Click the “Remove” link in the right hand pane to filter the Participant list to only display those employees who have already got the review assigned to them.

Performance Period

Modules > Performance > Setup > Performance Period

PERFORMANCE > PERFORMANCE PERIOD

PerformancePeriod List Value

Search Clear Search Advanced xls

Type	ID	Value	Order	Class	Relationship	Filter	Description	Active
	2013	2013 Performance Review Period					EC6.HR3 performance	<input checked="" type="checkbox"/>
	2014	2014 Performance Review Period					EC6.HR3 performance	<input checked="" type="checkbox"/>

PerformancePeriod * [] [] [] [] [] [] [] [] []

Rows 1 to 2 of 2

The performance period is also used in the Remuneration module so that performance ratings can be used in remuneration reviews.

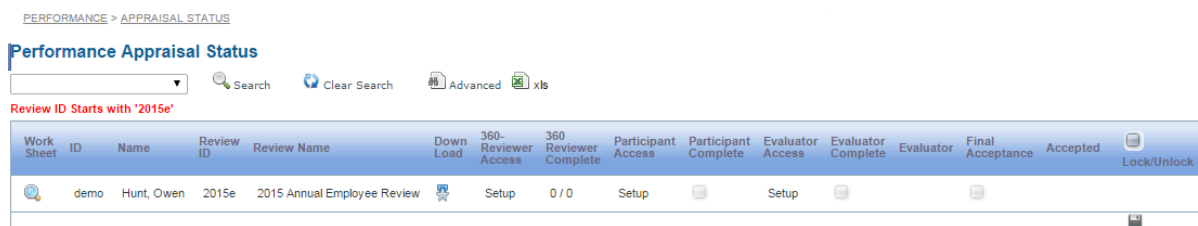
Maintaining Appraisals During the Review Period

Appraisal Status



Modules > Performance > Maintenance > Appraisal Status

Performance Administrators and Human Resources users access this report to check the set-up status and completion level of performance appraisals. The worksheet can be viewed and downloaded as a Word document. There is also a feature to lock or unlock one or more appraisals, providing an appraisal-specific level of security beyond the general security status defined in review setup.

Use the various search options to filter the information available.



Worksheet	Use this link to view the appraisal worksheet.
ID	The ID of the participant
Name	The name of the participant
Review ID	The ID of the review template
Review Name	The name of the review template
Download	Click the link to download the appraisal data to a MS Word document.
360 Reviewer Access	Displays the relevant status from the review set-up form.
360 Reviewer Complete	Displays the number of 360 reviewers that have completed an appraisal plus the total number of 360 reviewers assigned to an appraisal.
Participant Access	Displays the relevant status from the review set-up form.
Participant Complete	The box is checked if the participant has completed the appraisal (i.e., the Complete Confirmation box has been checked on the performance appraisal).
Evaluator Access	Displays the relevant status from the review set-up form.
Evaluator Complete	The box is checked if the evaluator has completed the appraisal (i.e., the Complete Confirmation box has been checked on the performance appraisal).

- Final Acceptance** The box is checked if the acceptor has completed the appraisal (i.e., the Complete Confirmation box has been checked on the performance appraisal).
- Accepted** Displays the name of the acceptor of the performance appraisal, if available.
- Lock/Unlock** A check box appears if both the Participant and the Evaluator have confirmed that they have completed the Appraisal. Check the box and click the  icon to lock the appraisal worksheet so that it can't be edited. Check and click again to unlock.
- Lock/Unlock All** Check the box in the report header area and click the  icon to lock all appraisal worksheets where both the Participant and the Evaluator have confirmed that they have completed the Appraisal.

This also sets or clears the appraisal timestamp (if there is no date, the current date is set; if there is a date, it is cleared).

Manage Appraisal Overrides

Modules > Performance > Maintenance > Appraisal Override

Performance Administrators and Human Resources users access this report to set override values for current Performance Appraisals.

Change values and click the "Submit" button to save the changes.

PERFORMANCE > APPRAISAL OVERRIDE

Performance Appraisal Override

Submit Search Clear Search Advanced xls

ID	Name	Position	Review ID	Review Name	EVID	Evaluator	360 Reviewer Complete	Participant Complete	Evaluator Complete	Final Acceptance	Appraisal Locked	Overall Rating	Score
			2014x	2014 Executive Review	demo	Hunt, Owen	0 / 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼	
test05	Bailey, Miranda	Emergency Medicine Consultant	2014e	2014 Annual Employee Review	demo	Hunt, Owen	0 / 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4 ▼	
test08	Burke, Preston	Oncologist	2014e	2014 Annual Employee Review	demo	Hunt, Owen	0 / 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 ▼	
test03	Freeman, Brooke	Obstetrics Consultant	2014e	2014 Annual Employee Review	demo	Hunt, Owen	0 / 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2 ▼	
demo	Hunt, Owen	Director of Medicine	2014x	2014 Executive Review	admin		0 / 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼	
demo	Hunt, Owen	Director of Medicine	2015e	2015 Annual Employee Review	admin		0 / 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼	

- EVID** Allows entry of a new Evaluator ID
- Participant Complete** Performs the same function as the Employee Complete Confirmation check box on the Overall/Summary tab in the appraisal worksheet
- Evaluator Complete** Performs the same function as the Evaluator Complete check box on the Overall/Summary tab in the appraisal worksheet
- Final Acceptance** Performs the same function as the Acceptance Complete check box on the Overall/Summary tab in the appraisal worksheet

- Appraisal Locked Locks the appraisal worksheet so that it can't be edited; unlocks the worksheet if further work needs to be done on the selected appraisals.

- Overall Rating Allows an overall rating to be entered as per the Overall Rating field on the Summary tab in the appraisal worksheet

- Score Allows a score to be entered by an administrator rather than the evaluator.

Final Acceptance

Modules > Performance > Maintenance > Final Acceptance

Work in progress - a new maintenance report.

Manage 360 Reviewer Assignments

This subsection of the maintenance tab is used to view and assign people as 360 reviewers for performance appraisals.

360 Reviewer Selection

Modules > Performance > Maintenance > 360 Reviewer Select

This report lists each participant in 360 reviews with a count of the number of assigned 360 reviewers. Use the search fields to filter the records displayed. Drill down to add 360 reviewers for a participant by clicking the magnifying glass icon.

[PERFORMANCE > 360 REVIEWER SELECT](#)

360 Reviewer Select

<input type="text"/>	Search	Clear Search	Advanced					
360 Reviewers	ID	Name	Position	EvID	Evaluator	Review ID	Review Name	360 Count
	demo	Hunt, Owen	Director of Medicine	admin	admin, admin	2015e	2015 Annual Employee Review	

Performance 360 Reviewers - [Person]

Modules > Performance > Maintenance > 360 Reviewer Select > 360 Reviewers

This report allows for one or more people to be selected at a time as 360 reviewers of the selected appraisal.

PERFORMANCE > 360 REVIEWER SELECT > 360 REVIEWERS

Performance 360 Reviewers - Hunt, Owen

Search

Location Starts with 'Sydney'

<input type="checkbox"/>	360 Type	ID	Name	Position	OrgUnit	Record
<input type="checkbox"/>	Subordinate	test05	Bailey, Miranda	Emergency Medicine Consultant		
<input type="checkbox"/>		test08	Burke, Preston	Oncologist		
<input type="checkbox"/>	Team	test03	Freeman, Brooke	Obstetrics Consultant		
<input type="checkbox"/>	Subordinate	test04	Krypkee, Barry	BioMedical Scientist		
<input type="checkbox"/>	Subordinate	test02	Rolleston, Boyd	Orthopedic Surgeon		
<input type="checkbox"/>	Subordinate	test06	Shepherd, Derek	Head of Neuro Surgery		
<input type="checkbox"/>	Subordinate	test10	Test, Agency	General Surgeon		
<input type="checkbox"/>	Subordinate	test07	Torres, Callie	Cardiologist		
<input type="checkbox"/>	Subordinate	test09	Webber, Richard	Pediatrician		
Rows 1 to 9 of 9						

Check the boxes at the left for each person you wish to assign where the Record icon is red , and then click the Save icon at the bottom left to save your choices. The results are displayed. To remove assignments, mark any boxes where the Record icon is green , and then save. The Record icon will again display as red.

<input type="checkbox"/>	360 Type	ID	Name	Position	OrgUnit	Record
<input type="checkbox"/>	Subordinate	test05	Bailey, Miranda	Emergency Medicine Consultant		
<input type="checkbox"/>	Team	test03	Freeman, Brooke	Obstetrics Consultant		
<input type="checkbox"/>	Subordinate	test07	Torres, Callie	Cardiologist		
<input type="checkbox"/>		test08	Burke, Preston	Oncologist		
<input type="checkbox"/>	Subordinate	test04	Krypkee, Barry	BioMedical Scientist		

Manage 360 Reviewer Overrides

Performance > Maintenance > 360 Reviewer Overrides

This report allows administrators to view the completion status of each 360 reviewer for each participant. They can also complete 360 reviews on behalf of the assigned and delete assignments.

PERFORMANCE > 360 REVIEWER OVERRIDE

Performance 360 Reviewer Override

Search

ID	Name	Position	Review ID	Review Name	Reviewer Complete	360 ID	360 Reviewer	360 Position	Delete Reviewer
demo	Hunt, Owen	Director of Medicine	2015e	2015 Annual Employee Review	<input type="checkbox"/>	test05Bailey, Miranda	Emergency Medicine Consultant		<input type="checkbox"/>
demo	Hunt, Owen	Director of Medicine	2015e	2015 Annual Employee Review	<input type="checkbox"/>	test03Freeman, Brooke	Obstetrics Consultant		<input type="checkbox"/>

Reviewer Complete Mark each box to complete the 360 review on behalf of the reviewer. Click the button in the top left of the report header to save the changes.

Delete Reviewer Mark each box for 360 reviewers that are no longer to be assigned to the appraisal. Click the button in the top left of the report header to save the changes.

Note: You can mark some records as “complete” and others as “delete” at the same time and click submit once to save all changes.

Add a New 360 Reviewer

Performance > Maintenance > 360 Reviewer AddNew

Administrators can use this form to add a new 360 reviewer to a current performance appraisal. All fields are mandatory.

PERFORMANCE > 360 REVIEWER ADDNEW



Performance 360 Reviewer

Review ID *
 Participant *
 Type *
 360 Reviewer *

Review ID Select from a list of review templates which are designated as 360 reviews.

Participant Select the participant who is to be appraised by the 360 reviewer

Type Choose from a list of options to define the 360 reviewer: Peer, Subordinate, Team, Superior, Org Unit

360 Reviewer Select the person to perform the 360 review for the previously selected review/participant.

View Appraisal Results

View Overall Results

Modules > Performance > Results > Current > Overall Results

This report displays the overall rating and score, if available, of the appraisals for all currently active reviews, as recorded by the Evaluator on the last tab in the appraisal worksheet.

The worksheet can be opened or downloaded from this report. The report is therefore an ideal place from which HR can access the current review for all Participants.

[PERFORMANCE](#) > [RESULTS](#) > [OVERALL RESULTS](#)

Performance Appraisal Results

Search

Work Sheet	ID	Name	Review ID	Review Name	Status	Overall Rating	Score	Down Load	Evaluator
	test05	Bailey, Miranda	2014e	2014 Annual Employee Review	InProgress	4			Hunt, Owen
	test08	Burke, Preston	2014e	2014 Annual Employee Review	InProgress	5			Hunt, Owen
	test03	Freeman, Brooke	2014e	2014 Annual Employee Review	InProgress	2			Hunt, Owen
	demo	Hunt, Owen	2014x	2014 Executive Review	InProgress				
	demo	Hunt, Owen	2015e	2015 Annual Employee Review	InProgress				
	test04	Krypkee, Barry	2014e	2014 Annual Employee Review	InProgress	1			Hunt, Owen
	test02	Rolleston, Boyd	2014e	2014 Annual Employee Review	InProgress	3			Hunt, Owen
	test06	Shepherd, Derek	2014e	2014 Annual Employee Review	InProgress	4			Hunt, Owen
	test10	Test, Agency	2014e	2014 Annual Employee Review	InProgress	2			Hunt, Owen
	test07	Torres, Callie	2014e	2014 Annual Employee Review	InProgress	4			Hunt, Owen
	test01	Warner, Chris	2014e	2014 Annual Employee Review	InProgress	4			Hunt, Owen
	test09	Webber, Richard	2014e	2014 Annual Employee Review	InProgress	3			Hunt, Owen

Rows 1 to 12 of 12

View Appraisal Completion rates

Modules > Performance > Results > Completion Rate

Displays a summary of how many people have completed each active review and allows access to the rating matrix. Users can drill down to display the number of Appraisals completed by each Evaluator for the specified review.

PERFORMANCE > RESULTS > COMPLETION RATE

Performance Appraisal Completion Rate

Search

Review ID	Review Name	Rating Matrix	Type	Class	Status	Appraisal Count	360 Reviewer Completion	Participant Completion	Evaluator Completion	Appraisal Completion	Evaluator DrillDown
2014e	2014 Annual Employee Review		Manager	Annual	Open	10					
2014x	2014 Executive Review		Manager	Annual	Open	1					
2015e	2015 Annual Employee Review		360	Annual	Open	1	0 / 2 (0%)				

Rows 1 to 3 of 3

- Rating Matrix** Click on this icon to open the rating matrix
- Appraisal Count** Displays the total number of Participants assigned to the Review.
- Participant Complete** Displays the number and percentage of all Participants who have checked the Employee Complete Confirmation box on the Overall/Summary tab of the appraisal worksheet.
- Evaluator Complete** Displays the number and percentage of all Evaluators who have checked the Manager Complete Confirmation box on the Overall/Summary tab of the appraisal worksheet.
- Appraisal Completion** Displays the number and percentage of all Appraisals that have been “Locked” via the Appraisal Override report or by Evaluators on the Performance Appraisal Status report.
- Evaluator DrillDown** Displays a report with review completion rates summarised by each Evaluator

PERFORMANCE > COMPLETION RATE > EVALUATOR DRILLDOWN

Performance Appraisal Evaluator Completion Rate

Search

Review ID	Review Name	Rating Matrix	Eval ID	Evaluator	Position	OrgUnit	Appraisal Count	Participant Completion	Evaluator Completion	Appraisal Completion
2015e	2015 Annual Employee Review						1	0 (0%)	0 (0%)	0 (0%)
2015e	2015 Annual Employee Review		test05	Bailey, Miranda	Emergency Medicine Consultant		1	0 (0%)	0 (0%)	0 (0%)

Use the Completion Rate link under Modules > Performance > Results > Completion Rate to view the Appraisal completion rates for historical (i.e., ‘Closed’) Reviews.

View Rating Matrix







Modules > Performance > Results > Rating Matrix

The Rating Matrix is a graphical representation of the performance appraisal scores. It opens in a separate browser tab. An example can be seen below.

2015 Annual Employee Review

Search

Performance appraisal scores

	N/A	Poor	Below Average	Average	Above Average	Excellent
9 - 10						
8 - 9						
7 - 8						
6 - 7						
5 - 6						
4 - 5						
3 - 4						
2 - 3						
1 - 2						
0 - 1						
Score	N/A	Poor	Below Average	Average	Above Average	Excellent
Total no. of employees	0	0	0	0	0	0

Historical Results

Appraisal History

Modules > Performance > Results > Appraisal History

Displays appraisals for closed reviews (i.e., where the review status = 'Closed'). This report allows access to the appraisal worksheet and to download the appraisal as a Word document.

Use the Overall Results link to access the Active (i.e., 'Open') review

PERFORMANCE > APPRAISAL HISTORY

Performance Appraisal History

Search
 [Clear Search](#)
[Advanced](#)
[xls](#)

ID Starts with 'demo'

Down Load	Work Sheet	ID	Name	Review ID	Review Name	Evaluator	Overall Rating	Score	Appraisal Complete
		demo	Hunt, Owen	1008	A new test	admin	5	80.0000	2014-06-30
		demo	Hunt, Owen	1010	Tab Test	admin			
		demo	Hunt, Owen	1011	Ratings Test	admin			
		demo	Hunt, Owen	1012	Tab Test 2	admin			
		demo	Hunt, Owen	2013a	2013 Annual Review	admin			2013-12-07
		demo	Hunt, Owen	2014x	2014 Executive Review	admin			
		demo	Hunt, Owen	1007	Sam's Test Review	admin			

Rows 1 to 7 of 7

Completion History

Modules > Performance > Results > Completion Rate History

This is a view of the completion report filtered for closed reviews only.

PERFORMANCE > RESULTS > COMPLETION RATE HISTORY

Performance Appraisal Completion Rate

Search
 [Clear Search](#)
[Advanced](#)
[xls](#)

Review ID	Review Name	Rating Matrix	Type	Class	Status	Appraisal Count	360 Reviewer Completion	Participant Completion	Evaluator Completion	Appraisal Completion	Evaluator DrillDown
2013a	2013 Annual Review		Manager	Annual	Closed	11		11 (100%)	11 (100%)	11 (100%)	

Employee Menu

Current Review

Modules > Performance > Employee > Current Review

The Current Review link opens the current active appraisal worksheet in a new browser tab. For the Worksheet to open, the Participant must be assigned to the review, the Master Review Status must = 'Open' and the Participant Status must not be set as "No Access". If no appraisal meets these

criteria for the login user, the link is not visible. A sample worksheet is shown below, displaying various tabs.

[Save Form](#)

i Instructions	 Key Indicators	 Objectives	 Skills	 Goals	 Competence	 Overall
--------------------------	--------------------	----------------	------------	-----------	----------------	-------------

ID	demo	Review	2014 Executive Review
Name	Hunt, Owen		
Position	Director of Medicine		
OrgUnit	1095	Location	Melbourne
Manager	admin, admin	Date Joined	25/02/2013

Introduction

Developing a result-oriented performance culture is critical to successfully achieving organisational goals and objectives. One tool managers can use to develop results-oriented performance cultures is their appraisal programs. Appraisal programs provide a formal process for communicating organisational goals and individual performance expectations, promoting accountability for achieving those goals, identifying developmental needs, assessing performance using appropriate measures, improving individual and organisational performance, and using the results of the appraisal as a basis for appropriate personnel actions. Effective appraisal programs are fair, credible, and transparent by providing for the following:

- **Alignment.** Employee performance plans align with and are designed to support organizational goals.
- **Results focus.** Employee performance plans hold employees accountable for achieving results appropriate to their level of responsibility.
- **Credible Measures.** Employee performance plans provide for balance, so that in addition to measuring expected results, the performance plans include appropriate measures, such as quality, quantity, timeliness, and/or cost-effectiveness, indicators of competencies, and customer perspective. In addition, for managers and supervisors, performance plans should also incorporate employee perspective.
- **Distinctions in levels of performance.** The appraisal program provides for multiple levels to appraise performance and rating officials use those levels to clearly describe distinctive levels of performance and appropriately rate employee performance.
- **Consequences.** The result of appraisal is used for recognizing top performers and addressing poor performance.
- **Employee Involvement.** Employees are involved in the design of the appraisal program and in the development of their performance plans.
- **Feedback and Dialogue.** The appraisal program establishes a performance feedback process that ensures a dialogue between supervisors, managers, and employees throughout the year.
- **Training.** The appraisal program requires that executives, managers, supervisors, and employees receive adequate training and retraining on the performance appraisal program. In addition, supervisors must have the competencies necessary for managing performance.

Instructions

Consider the employee's performance in each category and designate the level of performance that most accurately describes his/her job performance....



[Save Form](#)

i Instructions	 Key Indicators	 Objectives	 Skills	 Goals	 Competence	 Overall
--------------------------	--------------------	----------------	------------	-----------	----------------	-------------

ID	demo	Name	Hunt, Owen
-----------	------	-------------	------------

A performance objective is a specific end result that contributes to the success of the unit or organisation and that an employee is expected to accomplish or produce.

Performance objectives provide focus to an employee's work to ensure that his or her actions are directed towards achieving important mission-related outcomes. Performance objectives are not work activities, task descriptions, or responsibilities listed in a performance description.

A performance objective specifies the outcome or end result of a work activity.

Teaching Others

Overall concern for the developmental level of an individual or group. Takes steps to explain and provide guidance. ●

Enter Comments

Human Resources Management

The effective distribution of employee assignments with respect to ability and overall goals. Management of influences which effect performance and motivation. ●

Enter Comments

Performance Management

Ability to effectively manage staff development. ●

Enter Comments

[Library Item](#)



Save Form

Instructions	Key Indicators	Objectives	Skills	Goals	Competence	Development	Overall
--------------	----------------	------------	---------------	-------	------------	-------------	---------

ID: test01 Name: Warner, Chris

Skills represent the knowledge and abilities you must possess to successfully perform your job. By assessing your performance you and your supervisor are better able to make decisions concerning your career development, readiness for new assignments, pay, and job performance.

Using the below list, rate yourself on each of the skills listed. Your ratings can provide you and your supervisor with useful information about your strengths and areas in need of additional development.

Skills	Rating	Skills Attended
Presentation	1 2 3 4	Green
Oral Communication	1 2 3 4	Yellow
Written Communication	1 2 3 4	Red
Reading & Reading Comprehension	1 2 3 4	Red
Listening	1 2 3 4	Red

Save Form

Instructions	Key Indicators	Objectives	Skills	Goals	Competence	Overall
--------------	----------------	------------	--------	-------	------------	----------------

ID: demo Name: Hunt, Owen

Finally, provide an overall rating. When considering the overall performance rating, managers should not just consider the performance of the individual alone but must consider their performance in relation to the performance of others in the team or relevant group to ensure fairness.

Include comments on the employee's achievement of objectives, values and overall performance. Comments should be kept brief but provide sufficient overview of performance to give the employee a reasonable summary of views from the Appraisal. There is no need to provide an analysis of each objective, value or piece of evidence presented at the review.

Overall Rating

▼

Overall Comments

Employee Comments

test

Employee Complete Confirmation



Second Review

Modules > Performance > Employee > Second Review

If a person is assigned to more than one review template that is open and available to setup, read, or edit by the participant, the second appraisal worksheet can be accessed via this link. If no appraisal meets these criteria for the login user, the link is not visible.

Select 360 Reviewers

Modules > Performance > Employee > 360 Reviewers

Opens the report described above at "Performance 360 Reviewers – [Person]". The link is only visible when the performance review setup includes 360 Reviewer Status = Setup and the review type is 360.

Second 360 Reviewers

Modules > Performance > Employee > Second 360 Reviewers

Opens the report described above at “Performance 360 Reviewers – [Person]”. The link is only visible when the performance review setup includes 360 Reviewer Status = Setup, the review type is 360, and the login user has more than 1 current 360 review.

Appraisal Download

Modules > Performance > Employee > Appraisal Download

The Appraisal Download link opens the current active Appraisal in a Word document which can be printed or saved. Similarly to the Worksheet, the DOCX will only open if the Participant is assigned to the review, the Master Review Status must = ‘Open’ and the Participant Status must not be set as “No Access”.

Second Download

Modules > Performance > Employee > Second Download

The Second Download link opens the current active Appraisal in a PDF document which can be printed or saved. Similarly to the Worksheet, the PDF will only open if the Participant is assigned to the review, the Master Review Status must = ‘Open’ and the Participant Status must not be set as “No Access”. This link only appears if the user has more than one current performance appraisal.

Historical reviews

Modules > Performance > Employee > Appraisal Download

Opens a report which allows the employee to access all past Appraisals (i.e., not the current appraisal) in which they were the participant.

PERFORMANCE > EMPLOYEE > APPRAISAL HISTORY

Performance Appraisal History

Search

Down Load	Work Sheet	ID	Name	Review ID	Review Name	Evaluator	Overall Rating	Score	Appraisal Complete
		demo	Hunt, Owen	1010	Tab Test	admin			
		demo	Hunt, Owen	1011	Ratings Test	admin			
		demo	Hunt, Owen	1012	Tab Test 2	admin			
		demo	Hunt, Owen	2013a	2013 Annual Review	admin			2013-12-07
		demo	Hunt, Owen	2014x	2014 Executive Review	admin			
		demo	Hunt, Owen	1007	Sam's Test Review	admin			

Rows 1 to 6 of 6

Down Load Opens the Appraisal in a PDF document

Work Sheet Opens the appraisal worksheet

Access to 360 Reviews

Modules > Performance > Employee > 360 Reviews (Count)

When the user has been assigned to complete 360 Reviews for others, the number of assignments will display as the “count” on the link. If the review setup also includes 360 Reviewer Status = Write, the user will be able complete the 360 reviews assigned.

[PERFORMANCE](#) > [EMPLOYEE](#) > [360 REVIEWS](#)

Performance 360 Reviews

Search Clear Search Advanced xls

Work Sheet	ID	Name	Review ID	Review Name	360 ID	360 Reviewer	360 Position	Access	360 Review Complete
Rows 0 to 0 of 0									

Manager

Current Review

Modules > Performance > Manager > Current Review

Opens a report which displays the current Active Appraisals for which the login user is defined as the evaluator.

PERFORMANCE > EMPLOYEE > CURRENT REVIEW

Performance Appraisal Status

Review ID Starts with '1008'

Work Sheet	ID	Name	Review ID	Review Name	Down Load	Participant Access	Participant Complete	Evaluator Access	Evaluator Complete	Evaluator	Lock/Unlock
	test10	Alex Karav	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test02	Boyd Rolleston	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test03	Brooke Freeman	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test07	Callie Torres	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test01	Chris Warner	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test06	Derek Shepherd	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test05	Miranda Bailey	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test08	Preston Burke	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>
	test09	Richard Webber	1008	A new test		NoAccess	<input type="checkbox"/>	View	<input type="checkbox"/>	Hunt, Owen	<input type="checkbox"/>

Rows 1 to 9 of 9

- Work Sheet** Opens the Worksheet
- ID/Name** ID and Name of each Participant
- Review ID/Name** ID and Name of the related review template for the appraisal
- Down Load** Opens the Appraisal as a PDF document for printing or saving
- Participant Access** Displays the current access status for the employee
- Participant Complete** Displays a check if the employee has checked the 'Employee Complete Confirmation' check box on the last tab in the appraisal worksheet
- Evaluator Access** Displays the current access status for the Evaluator
- Evaluator Complete** Displays a check if the Evaluator has checked the 'Reviewer Complete Confirmation' check box on the last tab in the appraisal worksheet
- Lock/Unlock** Displays a check box if both the employee and the evaluator have checked the Appraisal as 'Complete' on the last tab in the appraisal worksheet. Checking this box and saving the record will prevent either the employee or the evaluator from editing the Appraisal.

360 Reviewer Selection

Modules > Performance > Manager > 360 Reviewer Select

This report lists each participant in 360 reviews with a count of the number of assigned 360 reviewers. Use the search fields to filter the records displayed. Drill down to add 360 reviewers for a participant by clicking the magnifying glass icon. Unlike the link in the HR Administration section, this link is filtered to list appraisals for which the login user is defined as the evaluator.

[PERFORMANCE](#) > [360 REVIEWER SELECT](#)

360 Reviewer Select

Search Clear Search Advanced

360 Reviewers	ID	Name	Position	EvID	Evaluator	Review ID	Review Name	360 Count
	demo	Hunt, Owen	Director of Medicine	admin	admin, admin	2015e	2015 Annual Employee Review	

Access to 360 Reviews

Modules > Performance > Manager > 360 Reviews (Count)

This report provides access to the evaluator of appraisals to view the responses and status of the 360 reviews. The report finds only those records in which the login user is the evaluator.

[PERFORMANCE](#) > [EMPLOYEE](#) > [360 REVIEWS](#)

Performance 360 Reviews

Search Clear Search Advanced xls

Work Sheet	ID	Name	Review ID	Review Name	360 ID	360 Reviewer	360 Position	Access	360 Review Complete
Rows 0 to 0 of 0									

Historical Reviews

Modules > Performance > Manager > Appraisal History

Opens a report which displays past appraisals for which the login user is defined as the evaluator.

PERFORMANCE > MANAGER > APPRAISAL HISTORY

Performance Appraisal History

Search
 Clear Search
 Advanced
 xls

Down Load	Work Sheet	ID	Name	Review ID	Review Name	Evaluator	Overall Rating	Score	Appraisal Complete
		test05	Bailey, Miranda	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test08	Burke, Preston	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test03	Freeman, Brooke	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test04	Krypkee, Barry	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test02	Rolleston, Boyd	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test06	Shepherd, Derek	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test10	Test, Agency	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test07	Torres, Callie	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test01	Warner, Chris	2013a	2013 Annual Review	Hunt, Owen			2013-12-07
		test09	Webber, Richard	2013a	2013 Annual Review	Hunt, Owen			2013-12-07

Rows 1 to 10 of 10

The report allows past appraisals to be opened either in the Worksheet or as a PDF document.

Appraisal Worksheet

The structure of the Worksheet will vary depending on the setup of the template, however there are standard key elements.

The appraisal worksheet can consist of between 3 and 8 Tabs, depending on what is setup on the review template.

Security settings

Various rules are applied to the appraisal worksheet when the review status is Setup or Write. These rules are described below.

Participant/Evaluator Setup

- ✚ When in “Setup” mode, the entry fields for comments and ratings are disabled. Participants and evaluators may add metrics to the tabs where this function has been enabled (see above: *Creating the Performance Review -> Review Template -> Creating/modifying a review template*).
- ✚ Only the user who adds a metric can delete the added metrics. Titles and descriptions of added metrics can be edited by the person who added the metric.
- ✚ Metrics inherited from the review template are mandatory.
- ✚ Weightings for added metrics can be edited by the evaluator only.

Participant/Evaluator Write

- ✚ The titles and descriptions of added metrics are not editable.
- ✚ Weightings for added metrics can be edited by the evaluator only.
- ✚ If the evaluator has not completed work in the appraisal, the participant cannot see any of the evaluator’s comments or ratings (this rule applies to both mid-year and full year confirmations) unless the review setup allows.
- ✚ If self-rating has been selected in the review setup, then the participant’s comments and ratings fields are shown to the evaluator when the participant has completed the appraisal (this rule applies to both mid-year and full year confirmations) unless the review setup allows.
- ✚ Only the participant can edit the self-rating fields on the various tabs.
- ✚ If the review template includes mid-year review within an annual review, then the participant and evaluator initially see only the mid-year comments and ratings fields for editing.
- ✚ After both participant and evaluator complete the mid-year review, these fields are locked and are visible to both parties during the full-year portion.
- ✚ Separate fields are provided for participant and evaluator comments and ratings for the full-year portion, following the same security rules as the mid-year (participant cannot see evaluator comments and ratings until the evaluator has completed the appraisal – unless the review setup allows).

360 Reviewer Write

- ✚ Only the comments fields are editable by 360 reviewers.

- Participant and evaluator comments and ratings are not visible to 360 reviewers.
- The overall rating field is not visible to 360 reviewers.

Participant/Evaluator Read

- If the evaluator has not completed the appraisal, the participant cannot see the evaluator’s comments and ratings, unless the review setup allows. The metric title, description, and weighting are shown above this.
- If self-rating is included, the participant comment and rating for each metric appear first with the participant’s name displayed above. The evaluator’s comment and rating appear below the participant’s.
- This layout is repeated for each metric.
- Mid-year details are shown on a separate sub-tab in the same manner when full-year details are available.

Worksheet Tabs

Introduction Tab

The first tab provides general information about the review and the person being appraised.

i Instructions	 Key Indicators	 Objectives	 Skills	 Goals	 Competence	 Overall
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ID	demo	Review	2014 Executive Review
Name	Hunt, Owen		
Position	Director of Medicine		
OrgUnit	1095	Location	Melbourne
Manager	admin, admin	Date Joined	25/02/2013

Introduction

Developing a result-oriented performance culture is critical to successfully achieving organisational goals and objectives. One tool managers can use to develop results-oriented performance cultures is their appraisal programs. Appraisal programs provide a formal process for communicating organisational goals and individual performance expectations, promoting accountability for achieving those goals, identifying developmental needs, assessing performance using appropriate measures, improving individual and organisational performance, and using the results of the appraisal as a basis for appropriate personnel actions. Effective appraisal programs are fair, credible, and transparent by providing for the following:

- Alignment.** Employee performance plans align with and are designed to support organizational goals.
- Results-focus.** Employee performance plans hold employees accountable for achieving results appropriate to their level of responsibility.
- Credible Measures.** Employee performance plans provide for balance, so that in addition to measuring expected results, the performance plans include appropriate measures, such as quality, quantity, timeliness, and/or cost-effectiveness, indicators of competencies, and customer perspective. In addition, for managers and supervisors, performance plans should also incorporate employee perspective.
- Distinctions in levels of performance.** The appraisal program provides for multiple levels to appraise performance and rating officials use those levels to clearly describe distinctive levels of performance and appropriately rate employee performance.
- Consequences.** The result of appraisal is used for recognizing top performers and addressing poor performance.
- Employee Involvement.** Employees are involved in the design of the appraisal program and in the development of their performance plans.
- Feedback and Dialogue.** The appraisal program establishes a performance feedback process that ensures a dialogue between supervisors, managers, and employees throughout the year.
- Training.** The appraisal program requires that executives, managers, supervisors, and employees receive adequate training and retraining on the performance appraisal program. In addition, supervisors must have the competencies necessary for managing performance.

Instructions

Consider the employee’s performance in each category and designate the level of performance that most accurately describes his/her job performance....



Summary Tab

If sectional weighting is included on any of tabs 2-7, then the sectional weightings are shown above the overall rating field as read-only text.



Sectional Weightings

If sectional weightings have been defined for tabs 2-7, they will be displayed (read-only) in sequence with the tab labels and percentages displayed above the Overall Rating field.

Section	Rating Score	Weighting %	Weighted Score
Competence	0	50%	0
Objectives	0	%	0
Key Indicators	6	50%	3

Overall Rating

Valid rating options are entered on the Review template prior to assigning the review.

Participant/Evaluator Comments

Overall comments entered by both the participant and the evaluator

Complete Confirmation Check boxes The Employee and evaluator check the box once they have completed their input to the review.

- Checking the box and saving the Worksheet will enable the other party to see comments and ratings.
- The box can be un-checked and re-checked as many times as required, however each time the comments are made invisible to the other party.
- The check boxes can't be un-checked once the appraisal has been "locked"

Tabs 2-7

Only the first and last tabs in the Worksheet are fixed. The use of the other tabs is dependent on the template setup. These tabs are used to group the various metrics by type: KPI, Skill, Objective, Goal, Competence, and Development.

The screenshot shows the 'Objectives' tab selected in the navigation bar. The form contains the following sections:

- Teaching Others:** Overall concern for the developmental level of an individual or group. Takes steps to explain and provide guidance.
- Human Resources Management:** The effective distribution of employee assignments with respect to ability and overall goals. Management of influences which effect performance and motivation.
- Performance Management:** Ability to effectively manage staff development.

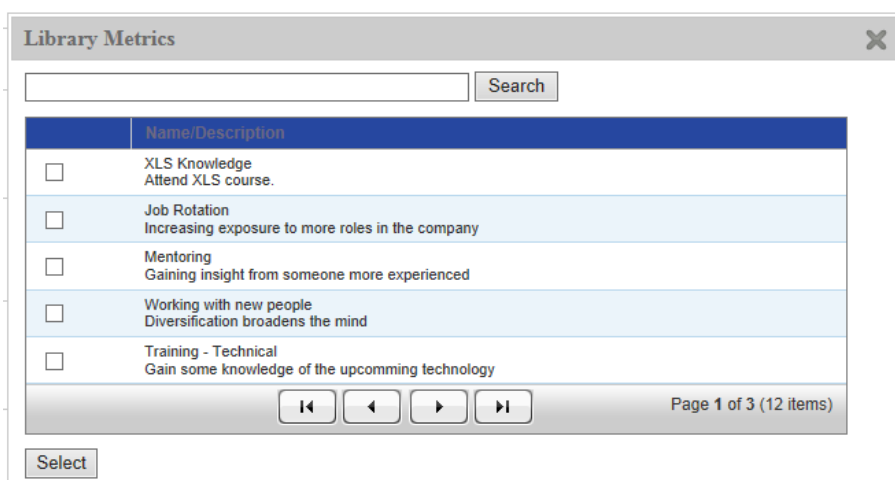


The type of metrics displayed and how the participant and the evaluator interact with those metrics is dependent upon the review template setup; however the following characteristics are standard:

- Only the assigned participant can edit their own comment/ratings
- Only the evaluator can edit their own comment/ratings
- HR can view comments and ratings made by both the participant and the evaluator at any time during the review process but cannot edit them.
- Employees can only view the evaluator comments/ratings once the evaluator has indicated that the appraisal is complete by checking the **Reviewer Complete Confirmation** box on the last tab in the appraisal. For mid-year completion, the field displays: **Mid Year Confirmation** .
- Reviewers can only view the participant's comments/ratings once the participant has indicated that the appraisal is complete by checking the **Employee Complete Confirmation** box on the last tab in the appraisal.
- The **Save Form** button does not have to be clicked when moving between tabs in the worksheet. Clicking the button saves changes made to every tab since the last time the

button was clicked. The button can be clicked as often as liked in order to save changes, however saved changes cannot be undone. Closing the worksheet without clicking the button will cause any changes made on all tabs since the last time the button was clicked to be lost.

- The **Add New** button opens a new blank metric on the current tab in the worksheet. The user can enter the title and description. It will display in the sequence it was added.
- Please note these new metrics will be added to the metric library and the Metric Id will be assigned sequentially from number 1.
- The **Library Item** button opens a list of standard metrics of the type applicable to the current tab in the Worksheet.



- The list of library metrics displayed only includes metrics of the relevant type and which have not already been added to the Participants Appraisal.

Client Satisfaction

Improve client satisfaction feedback by setting up an appropriate survey by Q3 2014



Enter Target Date Enter Date Complete

- The Delete icon is displayed next to metrics that can be deleted from the appraisal worksheet. Metrics that have been added by the participant or the evaluator are the only metrics that are permitted to be deleted. Metrics assigned via the review template cannot be deleted.
- The participant can only delete metrics that they added themselves and the evaluator can only delete metrics they added themselves. Neither can delete metrics added by the other.
- Hover text is provided to describe the color-coded status icons for all metrics:
 - Red indicates that both parties need to complete an item.
 - Yellow indicates that one party has completed, but the other hasn't.
 - Green indicates that both parties have completed the item.