360 EMPLOYEE EVALUATIONS

The focus of the 360 evaluation is to obtain a holistic view of the employee as viewed by their subordinates, managers, peers as well as a self-evaluation and that of stakeholders.

User Manual

Introduction to Employee Evaluation

The 360 Employee Evaluation Module was created to assist in the Performance review process. The focus of the 360 evaluation is to obtain a holistic view of the employee as viewed by their subordinates, managers, peers as well as a self evaluation and that of stakeholders (stakeholders will be introduced in a following release).

The employee that participates in the 360 Evaluation will receive an email containing a link to the evaluation dashboard. The dashboard will display a list of employees that the participant must evaluate. The participants’ progress of the evaluation is displayed and the results are saved.

The bulk of the administration can be managed via an import process. The approach used makes the evaluation process effortless and fun for the participant and easy to manage for the administrator, making this a very valuable addition to the Performance Management functionality within the system.

1. Definition of Terms used in the Module

1.1 Periods

The evaluation period can be defined as the period that evaluations needs to be completed. Overlapping periods are allowed. Each period has specific setup that can be specified. Only one period can be active at a time where the setup can be done.

1.2 Categories

A category can be defined as a grouping of evaluations to which an employee to be evaluated can be linked to. An example is Supervisory Categories and Non-supervisory Categories.

1.3 Participant Roles

A participant role can be defined as the role in which a participant will evaluate an employee. The most used roles are:

- Manager
- Self
- Colleagues / Peers
- Subordinates / Stakeholders

These roles can be setup to be auto mapped and whether this role's score are included in the overall evaluation score used for Performance Management.

1.4 Participant Assessments

A participant assessment can be defined as the grouping per period, assessment, category and participant role.

In other words, a participant is linked to a period, an assessment, category and participant role.

1.5 Employees to be Evaluated

A list of employees that needs to be evaluation for a specific category and period.

1.6 Employees Evaluating Others

The participants who is evaluating employees.

1.7 Job Title Exclusions

These exclusions are applicable to participant when using the auto-mapping function or manually mapping participants.

Employee Evaluation Dashboard

The employee evaluating others will have entries when selecting the Employee Evaluation menu item. If these items are opened, the list of employees that needs to be evaluated will be displayed.

2.1.1 Menu Item

When the employee select the menu item, the page will display as follow:

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If the "Open" button is selected, the employee will be redirected to the dashboard.

2.1.2 Employee Dashboard

On this dashboard, the employee (participant) will have an introduction message and a list of employees that he needs to evaluate.

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2.1.2.1 Evaluating an Employee

Once the participant selects the "Evaluate" button, the evaluation assessment will open and can be completed.

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2.1.2.2 I don't want to participate

Should the option be available, a participant can select not to evaluate an employee. A reason needs to be specified.

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Manager Dashboard

The manager has a dashboard that enables him to have sight of his employees that needs to be evaluated and their progress.

This dashboard includes progress on employees being rated, evaluations completed and employees not participating.

The Manager also has his personal evaluations tab for employees he is evaluating.

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A manager has the ability to manage his employee's evaluations by creating evaluations and mapping the participants. The notifications to all participants are also sent from here.

3.1.1 Adding an employee to be evaluated

When adding an employee to be evaluated, the manager will see a list of the employees reporting to him.

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3.1.2 Mapping of participants

After the employees to be evaluated are selected, the participants needs to be mapped. An option to auto-map participants is available but ad-hoc mappings can also be done.

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After the mappings have been done, notifications are sent out to the participants evaluating the employee.

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3.1.3 Progress per employee to be evaluated

Progress are shown per employee. There are indicators for not started, in progress and completed.

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HR Manager Dashboard

The HR Manager has a dashboard that enables him to have sight of the Performance Managers reporting to him. From here, the Business Unit HR Manager are able to manage the Manager Dashboard.

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When selecting a Manager, the Business Unit HR Manager has the ability to see the Performance Manager's dashboard. All functions that are available for the Performance Manager are also available to the Business Unit HR Manager (see 3.1 Manager Dashboard).

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Administrator Functions

The Administrator has the ability to create the periods, categories, participant roles, participant assessments, create evaluations and adding participants. Employee Evaluation mappings can be imported by the Administrator or the auto-mapping functionality can also be done.

The following sections will explain the above-mentioned functions.

5.1.1 Periods

The evaluation period can be defined as the period that evaluations needs to be completed. Overlapping periods are allowed. Each period has specific setup that can be specified. Only one period can be active at a time where the setup can be done.

A new period can be created for the evaluation period. The evaluations for the participants will only show during the active period. The list of all periods are displayed and only one period at a time can be active. The Active Period is the one you use for all the setup.

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A new period can be created. The following fields needs to be completed:

- Name of the period - Unique Name for this period.
- Start Date - The date that the period starts and evaluations are available to participants.
- End Date - The date that the period ends and closes.
- Max Mappings per Participant - The maximum number that a participant can be mapped for this period.
- Questionnaire Landing Page Instructions - Details included in the Questionnaire Landing Page Instruction field will be displayed on the Questionnaire Landing Page.
- Period Email Description - The Period Email Description will be displayed in the email sent to the participant.
- Lock after Completed - This setting will prevent participants from making any changes once the entire evaluation has been completed.

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5.1.2 Categories

A category can be defined as a grouping of evaluations to which an employee to be evaluated can be linked to. An example is Supervisory Categories and Non-supervisory Categories.

Categories are to be linked to periods and assessments. New categories can be added and the name and a description can be specified.

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5.1.3 Participant Roles

A participant role can be defined as the role in which a participant will evaluate an employee. The most used roles are:

- Manager
- Self
- Colleagues / Peers
- Subordinates / Stakeholders

These roles can be setup to be auto mapped and whether this role's score are included in the overall evaluation score used for Performance Management.

When creating a participant role, the following can be specified to that particular role:

- Include this role's score in the overall evaluation score - This score will be included in Performance Management Module.
- Is included for Auto Mapping - This role will be included when the auto mapping functionality is used.
- Auto Mapping Type:
  - **Self**: The employee being evaluated, will be mapped to him-/herself (Can only have 1 mapping)
  - **Manager Type**: Only the employee’s Performance Manager will be mapped (Will only have 1 mapping)

    - **Subordinates**: Only applicable if a Performance Manager is evaluated: Only employees reporting to the selected PM manager, will be mapped.
    - **Subgroup**: Random employees in the selected subgroup, equal to the number of mappings, will be mapped as participants
- Auto Mapping Rules:
    - Only managers / employees employed in a **primary** position, that is active during the selected period, can be mapped.
    - Auto mapping can only be applied when **no participants** have been linked to an Employee Being Evaluated.
    - **Participants** will only be mapped if they haven't reached their maximum number of evaluations
    - If no employees are found for the conditions specified below, no participants will be mapped for the specific type.

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5.1.3.1 Typical Participant Roles

5.1.3.1.1 Colleagues

An example of the setup for a colleague:

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5.1.3.1.2 Manager

An example of the setup for a manager:

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5.1.3.1.3 Self

An example of the setup for self:

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5.1.3.1.4 Subordinate

An example of the setup for a subordinate:

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5.1.4 Participant Assessments

A participant assessment can be defined as the grouping per period, assessment, category and participant role.

In other words, a participant is linked to a period, an assessment, category and participant role.

A participant assessment needs to be created per participant role. The assessment is built in the Assessment Builder module. (Please refer to the manual for more details)

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5.1.5 Employees to be Evaluated

A list of employees that needs to be evaluation for a specific category and period.

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Once the employees to be evaluated has been identified, the participants can be manually or auto mapped. The participants are mapped as follow:

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5.1.5.1 Manually create a participant

By selecting the "Create New Participant" button, a list of participants will display for selection.

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5.1.5.2 Auto Map Participants

By selecting the "Auto map participants" link, the participants will be mapped according to the rules of the periods and participant roles.

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5.1.6 Employees evaluating others

The participants who is evaluating employees.

The list of participants are managed individually. New participant evaluations can be created from this page and notifications can be sent.

An evaluation linked to a participant can be deleted at any time.

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5.1.6.1 Create New Participant Evaluation

By selecting the "Create New Participant Evaluation" button, the participant, role and employee to evaluate are selected from lists.

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5.1.6.2 View Participant Evaluation

A participant's evaluations are viewed and from here more evaluations can be added as well. A new evaluation can be added from here as well for a specific participant.

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5.1.6.2.1 Create New Participant Evaluation

When creating a new participant evaluation, the role and employee to evaluate are selected from lists.

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5.1.6.3 Sending Notifications

Notifications are sent from the system to notify a participant that he needs to evaluate employees. These email notifications are sent either for all participants at once or it can be sent to an individual participant.

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5.1.7 Job Title Exclusions

These exclusions are applicable to participant when using the auto-mapping function or manually mapping participants.

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By selecting the "Link/De-link Job Titles to Exclude" button, a list of job titles will be displayed and job titles can be linked in the exclusion list or de-linked in order to be mapped again.

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