User Manual V8

Performance Management: Getting Started

What is Performance Management?

Performance Management (PM) is the process that identifies, evaluates, develops and monitors employee performance in order to ensure that

- the company/department's mission and objectives are achieved;
- the company/department's values are practiced;
- the employees benefit by knowing what their expectations are and get recognition for their efforts;
- feedback on employee performance is provided, training and development approach is improved and career planning is furthered.

The use of this module is aimed at all personnel involved in performance management whether employees being performance managed or their managers assisting with the process and approving the results. The management of an employee’s performance is ideally a joint action between employee and manager. The steps involved in the performance appraisal process are:

- Creation of a new performance agreement by the employee or his performance manager.
- Discussion and establishment of key performance areas, stretch targets, company behaviours & values, leadership behaviours and key competencies. (This is ideally done during a joint discussion between the employee and his manager).
- Joint approval of the agreement’s contents (Employee and his performance manager).
- Joint discussion, rating and approval of contract items (Employee and his performance manager).
- Adjust and finalise overall performance contract (Manager)
- Final moderation (Manager, Moderating Committee)

Each of these steps is discussed in the rest of the performance management manual.

A list of definitions, abbreviations, acronyms and terminology can be found in Appendix A.

High Level Performance Management Process

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High Level Performance Management Process

Working with a Performance Contract

In the previous article we learned what is Performance Management, as well as the steps to follow in the performance appraisal process.

In this article we will learn how to work with a performance contract.

A performance contract is a contract between an employee and his/her manager to manage and keep track of the employee's performance during a review period. A performance contract consists of a performance agreement and occasionally some other components e.g. a 360˚ or value survey. A performance agreement in its turn consists of one or more assessment periods (e.g. quarterly, bi-annual or annual). An assessment period contains the actual items being measured and these could be grouped into different sections e.g. Key Performance Areas, Key Competencies, Stretch Targets, Company Values and Behaviours and Leadership Behaviours.

This module will be discussed from a manager's perspective.

How did I get here?

- *From the portal, click - Performance Management*

What can I expect in this section?

- How to view your current and previous performance agreements.
- How to create or copy a performance agreement.
- How to edit an existing performance agreement.
- Start an assessment period.
- Create a new review period.
- Where to manage your agreement content.

What configuration and master library data should be in place?

- The agreement year under consideration (Agreement Years)
- The periods the agreement year is divided into (Assessment Frequencies and Assessment Periods)
- The weights attached to contract items (Relative Importance of Contract Components)
- List of key performance areas (KPA)
- List of key performance indicators (KPI)
- List of rating scales (Rating Scales)
- List of company perspectives (Perspectives)
- Leadership behaviours (if applicable)
- **NB**: If the Values and Behaviours section is to be included on employee performance agreements, ensure that its library in Job Profiler is properly configured BEFORE creating the agreements. This section's contents cannot be added to an agreement after the agreement's initial creation.

Accessing the Performance Management Module

Login to the Signify HR system. From the Home page navigate to the **Performance Management** (PM) link in the Portal menu to open the performance management module.

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Manage a Performance Agreement/Scorecard

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A performance agreement is the agreed upon document determining an employee's scope of work against which he will formally be measured or performance appraised.

The **Manager Dashboard** screen opens with a list of all the performance contracts for all the employees, reporting directly to the manager. Employees with contracts not started yet, will be listed by default.

The following selection criteria is available on the Manager Dashboard screen as indicated in the figure above.

1. A performance year selection.
2. A **Not Started** selection blocks listing all employees with contract not started yet.
3. To display all the employees with contracts that have been started, click on the review frequency block.

If you are a manager and employees are reporting to you, the following will also be available in the **Quick Links** menu.

- **View my indirect employees**: Displays a list of all the employees linked to the manager's organisation and child org structure nodes who do not report directly to the manager.

Click on the **My Performance Agreement** button to manage your own scorecard.

Create a New Performance Agreement

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When the employee or his/her manager creates a new agreement, the following options are available:

1. **Create a blank review period**,
2. **Copy from employee's previous review period**,
3. **Copy from a system template** or,
4. **Copy an agreement of one of my employees**.

The performance year and review frequency values displayed in the dropdown lists were provided by the System Administrator as master data.

The **performance year** is the year period, with a start date and end date, to which the performance contract will apply.

The **review frequency** is how often contract reviews will be held during the performance year e.g.:

- Annual, there will be 1 review or assessment
- Bi-annual = 2 reviews
- Quarterly = 4 reviews, etc.

1. To create a blank review period or copy from the employee's previous review period, select the performance year and review frequency from the drop down boxes and click the **Continue** button**.**
2. To copy from a system template or copy an agreement of one of my employees, click the **Copy from a system template** button.

Create a Blank Review Period

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A performance agreement usually consists of one or more review periods e.g. semesters, quarters etc. Within the scope of a performance agreement each semester or quarter is called a review period.

You have the opportunity to create a blank review period.

To create a new blank review/assessment period for the performance year you've selected:

- Choose the **Create a blank review Period** radio button.
- Enter a description, start and end date.
- Click on **Continue**.

Your Performance Profile screen will be displayed showing the different sections with progress per section. Go to the **Working with Your Performance Profile Dashboard** article for more detail.

Copy From Employee's Previous Review Period

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Copy from employee's previous review period:

If a previous performance agreement exists for an employee, its contents (except the ratings and comments) can be copied into the existing and newly created agreement. (Note again that the number of review periods in the resulting agreement will match the number of periods in the agreement that is being copied.)

Select the Copy from Employee's Previous Review Period. Enter the start date, end dates and select the review period from the dropdown list. Click on **Continue.**

Notice that by copying from a previous period you have...

- ... created the agreement
- ... created a review period
- ... populated all the sections with the same content as in the original agreement.
- ... kept all the approval statuses intact i.e. if the contents were approved by both the manager and employee in the original review period, the contents will also be approved in the new review period.

Copy from a System Template

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Copy from a system template:

Agreement templates are predefined and prepopulated agreements, setup by the System Administrator as master data, which can be used as a quick way to create a new agreement.

Search for the required template by Template Name and/or Review Frequency.

Click on the **Action** hyperlink next to the template name and choose the **Copy** function. The new agreement is created and is opened on the agreement page, allowing the employee and manager to continue working on the agreement.

Notice that by copying from an agreement template you have...

- ... created the agreement
- ... created a review period

- ... populated all the sections with the same content as in the template agreement.

Copy an Agreement from one of my employees

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If you are a manager with employees reporting directly to you, the additional option to copy an agreement of one of your employees is available.

Search for the required employee and contract.

Click on the **Action** hyperlink next to the template name and choose the **Copy** function. The new agreement is created and is opened on the agreement page, allowing the employee and manager to continue working on the agreement.

Notice that by copying from an agreement template you have...

- ... created the agreement
- ... created a review period
- ... populated all the sections with the same content as in the agreement of the employee you copied from.

Manager Dashboard

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When selecting all contracts for employees who's contracts have started, the Manager Dashboard is displayed as figure above.

Every contract year is divided into steps or phases which have to be completed in a specific sequence. Use the tabs to switch between the different phases of the contract.

1. **First Semester:** Objective Settings (Content approval) and rating
2. **Second Semester:** Objective Settings (Content approval) and rating
3. **Additional**: Contract weight items

4. **Finalise**: Finalise and approve the overall evaluation

The progress on each phase is shown by tick marks to indicate a step is in progress or is completed. If the Dual Approval setting is ON, there will be a tick mark for manager and employee.

There will also be an indication if the review period's score is excluded in the final score calculations.

Click on the **Open** button to learn how to edit an existing review period.

Additional Actions

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The following additional actions are available for managers:

- **Print**: Display a detail report of the PM contract.
- **Details**: The manager has the opportunity to override the Revised Average score and change the Dual Approval setting for the contract.
- **History**: Open the employee's contract.
- **Manage Documents**: Upload, download or delete documents on the PM contract.
- **Audit Content report for First Semester**: Display an audit report showing all the changes made to the contents and scores by the employee and/or manager.
- **Refresh**: Refresh the current screen.
- **Include First Semester**: A Review Period's score can be included or excluded in the Overall Calculated Weighted Average (CWA) calculation.
- **Delete First Semester from Performance Agreement**: The review Period with all its contents can be deleted if it is not approved yet.

Working with Your Performance Profile Dashboard

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When selecting your contract, the **Your Performance Profile** screen is displayed as above.

Every contract year is divided into steps or phases which have to be completed in a specific sequence.

1. **First Semester:** Objective Settings (Content approval) and rating
2. **Second Semester:** Objective Settings (Content approval) and rating
3. **Additional:** Contract weight items
4. **Finalise:** Finalise and approve the overall evaluation

The progress on each phase is shown by tick marks to indicate the step is in progress or is completed. If the Dual Approval setting is ON, there will be a column for the manager and employee.

The following additional **Actions** are available on the review periods:

- A setting can be enabled to allow managers to include or exclude review periods.
- Delete a review period. Note that a review period can only be deleted if it has not been approved yet.

More functions available on a contract are:

- **Print**: Display a detail report of the PM contract.
- **Manage Documents**: Upload, download or delete documents on the PM contract.
- **Audit Content report for First Semester**: Display an audit report showing all the changes made to the contents and scores by the employee and/or manager.
- **Refresh**: Refresh the current screen.

Click on the **Start** or **Open** button in the performance agreement table to start working with a specific review period.

Working with the Assessment Period Contents

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The assessment period page contains a number of elements to assist the user in working as efficiently as possible.

1. The **Quick Links** menu enables the user to perform certain functions in the system. See the **Working with the Assessment Period Quick Links Menu** for more detail.
2. The **Instructions** button will display instructions and other help information. These instructions are pre-configured by the System Administrator.
3. Progress circle graphs show the weight percentages for the different sections. The **View/Hide** option is available for the Section Weights. Managers have the additional option to **Edit** the section weight percentages.
4. Hourglass and tick marks indicate the progress by the manager and employee in the approval process.
5. The assessment period sections are displayed in different tabs i.e:
    - Key Performance Areas
    - Stretch Targets
    - Company Values and Behaviours
    - Leadership Behaviours
    - Competencies
6. Every section must be completed before an employee or manager can **Submit Agreement Content.**

Working with the Assessment Period Quick Links Menu

Additional functionality is available in the Quick Links Menu:

- **Print Agreement Content**: Display a detail report of the PM contract .
- **Show Rating Scale**: Display a report with all the rating scale information per section.
- **Show Performance Year Scores**: Display the Performance Year score after the ratings have been approved.
- **Edit First Semester**: Change the description, start and end dates for the review period.
- **Import Key Competencies from Job Profile**: Import Key Competencies from the employee's job profile.
- **Copy from previous Review Period**: Copy contents from a previous contact review period.
- **Request Performance feedback from previous manager:** Send an email to another manager requesting feedback.
- **Import Leadership Behaviours**: Import Leadership behaviour as defined in the master data for managers.
- **View Position Profile**: Export the Position Profile report to Excel or Word.
- **Employee Details**: Display employee details Employee Number, Name, Surname, Org, Position Title and Appointment Date.

Project Management Process Flow

Project Management Process Flow
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The highlighted section in the diagram shows the process flow that will be described in the articles from **Working with Key Performance Areas** to **How to Approve an Assessment Period's Contents**.

Working with Key Performance Areas (KPA's)

In the previous article we learned how to work with a performance contract by creating a performance agreement and assessment periods.

In this article we will learn how to create the first component in the contents of a performance agreement namely Key Performance Areas (KPI's).

Perspectives are categories used to group KPA's together. Examples of perspectives are: financial perspective, customer perspective, internal process perspective, learning & growth perspective etc. Perspectives have to be created first before any KPA's can be added.

Key Performance Areas refer to the areas within the business for which a person is responsible e.g. Process Improvement, Safety and Health, Security, etc. A KPA is further defined or delineated by one or more key performance indicators (KPI's).

A K**ey Performance Indicator** is a type of performance measurement that acts as a compass, helping you understand how you are performing towards strategic goals. To be effective, a KPI must be well-defined, quantifiable and be crucial to achieving your goal.

How did I get here?

- *From the portal, click - Performance Management | My Performance Agreement | Select one of your existing agreements | Open one of the agreement’s assessment periods*

What to expect in this section?

- Where to view your perspectives, KPA's and KPI's for a performance agreement.
- How to add and edit a Perspective.
- How to add and edit a KPA.
- How to add and edit a KPI.

What configuration and master library data should be in place?

- A performance contract with an assessment period
- List of Key Performance Areas (KPA's)
- List of Key Performance Indicators (KPI's)

Create a New KPA Perspective

Create a New KPA Perspective
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Select the **Key Performance Areas** tab and click on the **Add New Perspective** button.

New KPA Perspective Input

New KPA Perspective Input
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Perspectives are predefined values in master data, created by a System Administrator. Select a perspective description from the drop down list and enter a weight.

Click the **Save And Close** or **Save Add New** button.

How to Manage an Existing KPA Perspective

Edit an Existing KPA Perspective
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To **Edit** an existing perspective, click on the pencil icon next to the Perspective description.

Click on the document icon to upload, download or delete documents for the Perspective. More detail is available in the article How to Manage Documents.

Note: The total percentage of all the perspectives should be 100%.

Add a Key Performance Area

Add a Key Performance Area
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Click on **Add Key Performance Area**.

Key Performance Area Input

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Key Performance Area Input

Choose a key performance area from the predefined list or enter a new KPA description. Enter the weight percentage and **Save**.

Edit a Key Performance Area

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Edit a Key Performance Area

To **Edit** an existing perspective, click on the pencil icon next to the KPA description.

Note: The total percentage of all the KPA's should be 100% for each Perspective section.

Add a Key Performance Indicator

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Add a Key Performance Indicator

Click on **Add Key Performance Indicator**.

Key Performance Indicator Input

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Key Performance Indicator Input

Choose a key performance indicator from the predefined list or enter a new KPI description.

Enter the measures, rating scale,weight percentage and due date. Click **Save**.

Edit a Key Performance Indicator

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Edit a Key Performance Indicator

Click on **Edit** in the Actions dropdown to modify an existing KPI.

Click on the **Manage Documents** to upload, download or delete documents for the KPI. More detail is available in the article How to Manage Documents.

The **View More** link will display the Measures and Rating Scale for the KPI.

Note that the total percentage of all the KPI's should be 100% for each KPA section.

Delete a Key Performance Indicator

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Select the check box in the row you want to delete. Click on the **Delete** button.

Add Personal Development Plan Activities

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Add Personal Development Plan Activities

Depending on a company’s performance management module setup, a link with which to add PDP initiatives directly from the KPA section could also be available. This is used by an employee or manager to identify further training requirements supporting his performance.

- Click on the **Add Training** KPA record’s hyperlink.
- One of the following scenarios will present itself:
    - The employee does not have a PDP and needs to create one first before adding initiatives to the PDP.
    - The employee has an existing PDP and you could continue adding a PDP record.
    - If an employee has an existing PDP, the PDP will open on the **Courses** tab.
    - Scroll down and locate the **Performance Related Training** (or similar) section.

How to Manage Documents

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The document upload functionality enables employees and managers to submit documentation (i.e. a portfolio of evidence), in support of their review, to their performance contract. Managers and Schema / System Administrators are also able to perform the same actions.

A Manage Documents screen displays a list of all the uploaded documents per employee per contract. This screen allows for uploading, downloading and deleting of documents.

The Manage Documents screen can be accessed from the list of performance agreements when you click on the document icons. When a document is uploaded, the total number of documents uploaded is displayed on the highest level of the agreement section (i.e. when documents are uploaded on KPI level the total is displayed on the Perspective Level). The total number of documents uploaded throughout the entire performance contract is displayed on the list of performance agreements in the ‘Contract Year’ column.

Working with Stretch Targets

In the previous article we learned how to load Key Performance Areas onto a performance agreement.

In this article we will learn how to add Stretch Targets to the contents of a performance agreement.

While **Key Performance Areas** refer to areas within the business for which a person is normally responsible as part of his job, **Stretch Targets (Goals)** are ambitious targets (KPA's) that force us to “stretch” our capabilities beyond our usual performance, current assumptions and processes. They differ from regular goals because of the level of difficulty; stretch targets are challenging but realistic targets that can be reached with additional effort.

A **Key Performance Indicator** is a type of performance measurement that acts as a compass, helping you understand how you are performing towards strategic goals. To be effective, a KPI must be well-defined, quantifiable and be crucial to achieving your goal.

Stretch Target Perspectives are categories used to group stretch targets (KPA's) together. Examples of stretch target perspectives are: financial perspective, customer perspective, internal process perspective, learning & growth perspective etc. Stretch Target perspectives have to be created first before any KPA's can be added.

How did I get here?

From the portal, click - Performance Management | My Performance Agreement | Open one of your existing agreements | Open one of the agreement’s assessment periods

What to expect in this section?

- Where to view your Stretch Target perspectives, KPA's and KPI's for a performance agreement.
- How to create and edit a Stretch Target perspective.
- How to create and edit a Stretch Target KPA.
- How to create and edit a Stretch Target KPI.

What configuration and Master library data should be in place?

- A performance contract with an assessment period
- List of Key Performance Areas (KPA's)
- List of Key Performance Indicators (KPI's)

Manage your Performance Agreement

Click on the hyperlink **View/Edit** to open the detail for a performance agreement.

Create a New Stretch Target Perspective

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Select the **Stretch Targets** tab and click on the hyperlink **Add New Perspective.**

New Stretch Target Perspective Input

New Stretch Target Perspective Input
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Perspectives are predefined values in master data, created by a System Administrator. Select a perspective description from the drop down list and enter a weight.

Click the **Save And Close** or **Save Add New** button.

Edit an Existing Stretch Target Perspective

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To **Edit** an existing perspective, click on the pencil icon next to the Perspective description.

Click on the document icon to upload, download or delete documents for the Perspective.

Note: The total percentage of all the perspectives should be 100%.

Add a Stretch Target Key Performance Area

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Click on **Add Key Performance Area**.

Stretch Target Key Performance Area Input

Stretch Target Key Performance Area Input
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Choose a Key Performance Area from the predefined list or enter a new KPA description. Enter the weight percentage and **Save**.

Edit a Stretch Target Key Performance Area

Edit a Stretch Target Key Performance Area
Image not found or type unknown

To **Edit** an existing perspective, click on the pencil icon next to the KPA description.

Note: The total percentage of all the KPA's should be 100% for each Perspective section.

Add a Stretch Target Key Performance Indicator

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Add a Stretch Target Key Performance Indicator

Click on **Add Key Performance Indicator**.

Stretch Target Key Performance Indicator Input

Image not found or type unknown
Stretch Target Key Performance Indicator Input

Choose a key performance indicator from the predefined list or enter a new KPI description.

Enter the measures, rating scale,weight percentage and due date. Click **Save**.

Edit a Stretch Target Key Performance Indicator

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Click on **Edit** in the Actions dropdown to modify an existing KPI.

Click on the **Manage Documents** upload, download or delete documents for the KPI.

The **View More** link will display the Measures and Rating Scale for the KPI.

Note that the total percentage of all the KPI's should be 100% for each KPA section.

Delete Stretch Target

Perspectives, KPA's and KPI's

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Select the check box in the row you want to delete. Press the **Delete** button.

Working with Company Values and Behaviours per Assessment Period

In the previous article we learned how to load stretch targets onto a performance agreement.

In this article we will learn how to add company values and behaviours to the contents of a performance agreement.

Company values and behaviours are clear statements of how you expect people in your company to act. By identifying your values and behaviours, and making them explicit, you shape your company's culture. This is important because the company values and behaviours provide a moral compass for the employees, establish a basis for consistent decision making by everyone and can give some guidelines for internal processes. Company values and behaviours are used to measure an employee’s performance against the company’s internal values and will automatically form part of each employee's performance contract.

How did I get here?

- *From the portal, click - Performance Management | My Performance Agreement | Open one of your existing agreements | Open one of the agreement’s assessment periods*

What to expect in this section?

- Where to view your company Values and Behaviours.

What configuration and Master library data should be in place?

- A performance contract with an assessment period
- A list of values and behaviours loaded under Company Values in the Job Profiler module.

Company Values and Behaviours

Company Values and Behaviours
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Company values and behaviours are automatically loaded when a performance contract is created and cannot be added, edited or deleted on the performance contract. The functionality to add, edit or delete these values, are available in the Job Profiler module under Administration | Company Values List.

Working with Leadership Behaviours per Assessment Period

In this article we will learn how leadership behaviours are integrated into a performance agreement's contents.

Leadership behaviours are components in a performance agreement only available to employees in a leadership position, i.e. if the employee has other people reporting to him.

Leadership behaviours cannot be added here and are automatically loaded from the Leadership Behaviours library when the agreement is created initially. If a leadership behaviour record is added to the library afterwards, existing agreements are not automatically updated but they can be updated manually.

How did I get here?

- *From the portal, click - Performance Management | My Performance Agreement | Open one of your existing agreements | Open one of the agreement’s assessment periods*

What to expect in this section?

- Where to view your leadership behaviours.
- How to import leadership behaviours.

What configuration and master library data should be in place?

- A performance contract with an assessment period.

Leadership Behaviours

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How to Import Leadership Behaviours

Leadership Behaviours

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Leadership behaviours are automatically added to the agreements of employees in leadership positions. If however, some of the behaviours are changed in the library and the agreement needs to be updated as well, do the following:

- From the Quick Links Menu, locate and click on **Import Leadership Behaviours.**

Working with Key Competencies per Assessment Period

In the previous article we learned how to work with leadership behaviours in a performance agreement.

In this article we will learn how to add key competencies to the contents of a performance agreement.

Key competencies and their defining proficiencies form part of a job's profile as compiled in the Job Profiler module. In Job Profiler a number of characteristics are used to profile or describe a job and subsequently also the positions derived from it. A key competency is one of those characteristics.

When adding key competencies to your performance contract, the competencies are read from the library maintained in the Job Profiler module. If a specific key competency is not available in your list, please ask the system administrator to add it to the Job Profiler library.

How did I get here?

- *From the portal, click - Performance Management | My Performance Agreement | Open one of your existing agreements | Open one of the agreement's assessment periods*

What to expect in this section?

- Where to view your key competencies.
- How to import, create or edit a key competency.

What configuration and Master library data should be in place?

- A performance contract with an assessment period
- List of key competencies loaded in Job Profiler

How to Import Key Competencies

Import a Key Competency
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- From the Quick Links Menu locate and select **Import Key Competencies from Job Profile.**
- A screen is opened, showing a list of competencies already part of the employee's position's job profile.
- Select the competencies that should be imported.

Add a New Key Competency

Add a Key Competency
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Select the **Key Competencies** tab and click on the **Add New Key Competency** button.

New Key Competency Input

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New Key Competency Input

Key competencies can be selected from a list of predefined values from master data or a new value can be added in the key competency field. Enter the required values and click the **Save And Close** or **Save Add New** button.

Edit an Existing Key Competency

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Edit an Existing Key Competency

Click on **Edit** in the Actions dropdown to modify an existing Key Competency.

Click on the **Documents** icon to upload, download or delete documents for the Key Competency.

The **View More** link will display the Rating Scale and Proficiency for the Key Competency.

Note that the total weight percentage of all the Key Competencies should be 100%.

Delete Key Competencies

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Delete Key Competencies

Do delete the Key Competency, select the check box in the row you want to delete. Press the **Delete** button.

How to Approve an Assessment Period's Contents

In the previous sections you learned how to enter a performance agreement's contents e.g. key performance indicators, stretch targets, company values and behaviours, leadership behaviours and key competencies.

In this article you will learn how to approve the assessment period contents before the period can be assessed or rated.

Once all appropriate contents (KPAs/KCs/LBs and/or VBs) have been listed on the performance agreement, the employee is expected to dual-approve the assessment period contents before the period can be assessed or rated.

How did I get here?

- *From the portal, click - Performance Management | My Performance Agreement | Open one of your existing agreements | Open one of the agreement's assessment periods*

What to expect in this section?

- How to approve/un-approve an assessment period contents
- What happened in the approving process?

What should be in place before approving the assessment period contents?

- The agreement under consideration should have been created with all the performance agreement detail in place e.g. key performance indicators, stretch targets, company values and behaviours, leadership behaviours and key competencies.

Employee Approves the Assessment Period Contents

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Once all the components of the agreement have been entered, an employee should indicate that he/she agrees with the content of the agreement. Click the **check box** and click the **Submit Agreement Content** button.

Confirm Agreement Content

Confirm Agreement Content
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Check values displayed and if you agree with the contents, click **Confirm** to submit the contents of the agreement.

Employee Un-approves the Assessment Period Contents

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Employee Un-approves the Assessment Period Contents

Occasionally the employee might want to change an assessment period's contents. This is possible while the performance manager hasn't approved the contents from his side yet.

Click on the **Modify Agreement Content** button.

A warning message will ask you to confirm the un-approval of the assessment period's contents.

The assessment period's sections have now been opened for editing. Once changes have been done, remember to again **Submit** the contents.

What Happened in the Approving Process?

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What Happened in the Approving Process?

The assessment period's progress bar indicates that you have approved/submitted the agreement content.

- The agreement's sections are now approved and locked, preventing further changes while awaiting the approval from your performance manager.
- The scoring fields are available in the different sections but are not yet open. They will become available for scoring only once the manager has approved the contents from his side as well.

At this stage an email notification is sent to your performance manager, informing him that he/she needs to approve your review period's contents before the rating can commence.

The next step in the process is: The employee and manager should discuss the agreement, make changes and the manager should approve the assessment period content.

Performance Manager Approves the Assessment Period Contents

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Performance Manager Approves the Assessment Period Contents

After the performance manager has dual-approved the assessment period content, the assessment period’s contents are now locked and scoring fields have been added to each record. You will receive an email notification informing you of the content's approval by your performance manager.

From this moment it is no longer possible for an employee to un-approve his period’s contents in order to make changes. If changes are required, contact your performance manager requesting him to click on **Modify Agreement Content** on your agreement period.

The following functions are now available on the assessment period:

- Choose to include/Exclude the item from the CWA calculation.
- Adding comments.
- Scoring and approving by the employee and manager.

How to Score and Rate an Assessment Period

In the previous article you learned how to enter and dual-approve the assessment period's contents.

In this chapter you will learn how to score and approve each contract item of the assessment period. The manager's responsibility and work procedures to score and approve the contracts items will also be discussed.

A performance agreement’s compilation and eventual scoring should be a joint action between an employee and his performance manager. At the end of the agreement period, the formal performance appraisal typically consists of the following process:

- A joint discussion between the employee and his performance manager against the backdrop of the contract items.
- The employee rates himself against the contract items.
- The performance manager rates the employee's contract items as he observes the performance.
- Determining a final score per contract item, agreed upon by both the employee and his manager.
- Identification of development areas per contract item where appropriate.

How did I get here?

- *From the portal, click - Performance Management | My Performance Agreement | Open one of your existing agreements | Open one of the agreement’s assessment periods*

What to expect in this section?

- How to rate the contract items
- How to approve/un-approve contract items
- How the manager rating and approving process works
- View the final scores

What should be in place before scoring and rating an assessment period?

- The agreement under consideration should be created with all the performance agreement detail and the contents should be dual-approved by the employee and his manager.

Rate and Approve Assessment Period Scores

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Rate and Approve Assessment Period Scores
The process flow of the rating and approval of assessment period scores is outlined in the diagram above.

Rating of Contract Items

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After an assessment period’s contents were approved by the performance manager, the rating sections of the contract items on the different sections of assessment have been opened as shown above.

The rating section consists of the following elements:

Include in Score:

- **Yes** - The contract item will form part of the final assessment period score.
- **No** - The contract item will not form part of the final assessment period score. The item still needs to be rated but will be ignored in all calculations. Use this when a contract item

did not apply to an employee during an assessment period.

Weight: The relative weight or importance attached to a contract item.

Team member rating: The employee's own rating of his performance against a contract item.

Rating Comments: Optional comments to accompany or clarify a rating especially in cases of differing opinions.

A team member or employee can now enter the include/exclude score indicator, rating and comments in the required fields.

Click the **Calculate and Save Rating** button.

Approve Assessment Period Scores

Approve Assessment Period Scores
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If the employee agrees with the score indicator, rating and comments, he can tick the check box and click on **Submit Agreement Content** to approve his own scores.

The following general rules apply to the approved scores:

- The approval is automatically cancelled when the performance manager updates any of the scores including the final score. The employee is therefore expected to endorse his changes by re-approving the scores from his side.
- Once the employee and his manager have approved the scores, they are locked, preventing further changes.
- If there is a need to update any score, request the performance manager to unlock the period.

An email is sent to the manager when scores have been approved by the employee and an email is sent to the employee when the manager approves the scores from his side.

Un-approve Assessment Period Scores

Un-approve Assessment Period Scores
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Occasionally the employee might want to change an assessment period's scores. This is possible while the performance manager hasn't approved the scores from his side yet.

Click on the **Modify Agreement Content** button.

A warning message will ask you to confirm the un-approval of the assessment period's scores.

The assessment period's sections have now been opened for editing. Once changes have been done, remember to again **Approve** the scores.

What Happened in the Approving Scores Process?

What Happened in the Approving Scores Process?
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The approval progress status is shown in the top right hand corner. Hour glass icons and tick marks indicate if the employee and manager's have approved the contents and ratings.

The agreement's sections are now approved and locked, preventing further changes while awaiting the approval from the performance manager.

The next steps in the process are:

- The manager should enter the scores and ratings in the appropriate performance agreement sections.
- The employee and manager should discuss the ratings and make changes were necessary.
- The manager should approve the agreement content and make the final ratings.

Performance Manager Rates and Approves Scores

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The following steps have to be done by the performance manager before the performance evaluation process can proceed:

1. Enter scores and comments in each section
2. Open and enter values in the long term development plan
3. Provide the final ratings
4. Approve the scores and ratings entered

After the performance manager has entered and approved the scores, the assessment period’s contents are now locked. The overall calculated weighted averages (CWA) and section ratings (RA) for all sections have been updated at this point. The employee will receive an email notification informing them of the period's approval by their performance manager.

From this moment it is no longer possible for an employee to un-approve his period in order to make changes. If changes are required, contact the performance manager, requesting him to click on **Modify Agreement Content** on the agreement period.

Open Long Term Development plan

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The **Long Term Development Plan** is available in the Quick Links Menu as shown above.

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Acknowledge the items in the Long Term Development Plan and save by clicking on the **Save Promotablity Index** button.

Manager Approves Assessment Period Scores

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If the manager agrees with the score indicator, rating and comments, he can tick the check box and click on **Approve Agreement Content** to approve the scores.

The following general rules apply to the approved scores:

- Once the employee and his manager have approved the scores, they are locked, preventing further changes.

- If there is a need to update any score, request the performance manager to unlock the period.

View Agreement Scores

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When all the review items have been rated by all the required parties. The approval progress status in the top right hand corner indicates that the employee and manager have approved the ratings.

The calculated score and section scores are displayed in the circular progress bars, once a section is finalised. These scores are determined using the managers’ final rating.

Employee Performance Profile Dashboard

The Performance Agreement Dashboard

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After the assessment ratings were successfully entered and approved, the tick marks will indicate the progress for the Assessment Period sections as indicated above.

Manager Dashboard

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After the assessment ratings were successfully entered and approved, the tick marks will indicate the progress for the Assessment Period sections as indicated above.

In the next section you will learn how to manage contract weight items and finalise the performance contract.

How to Finalise the Overall Evaluation of the Performance Agreement

In the previous article you learned how to enter ratings, calculate scores, dual-approve the assessment period's scores.

In this chapter you will learn how to update contract weights items and how to approve the overall performance contract.

At the end of the performance period, when all the agreement periods have been rated and approved, the following steps should be done to finalise the performance contract.

- The performance manager makes changes to the final scores.
- The employee approves the overall evaluation of the performance agreement.
- The performance manager approves the overall evaluation of the performance agreement.
- The manager provides the scores of any other contract components e.g. the 360 Review and calculate the final contract score.

How did I get here?

- *From the portal, click - Performance Management | My Performance Agreement | Open one of your existing agreements | Open one of the agreement's assessment periods*

What to expect in this section?

- How to approve/un-approve the overall performance agreement (finalise the performance year).
- How to view/edit the long term development plan.
- How to rate any other contract components on the performance contract e.g. the 360 Review (Section Ratings).

What should be in place before scoring and rating an assessment period?

- The agreement under consideration should be created with all the performance agreement detail and the contents should be scored and dual-approved by the employee and his manager.

Finalise the Performance Agreement

Finalise the Performance Agreement
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The above diagram outlines the performance agreement approval process and highlights the stage that is going to be discussed in this article.

Rating of Contract Weight Items

Rating of Contract Weight Items
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Contract Weight(ed) Items refer to any supporting or additional scores which should be added to the performance agreement in order to get the full picture of an employee's performance. Job performance many times forms only one part of an employee's total work performance.

To open your contract weight items scores click the **Open** button in the Additional section.

Edit Contract Weight Items

Edit Contract Weight Items
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To edit your contract weight items scores click the **Edit** button on the Contract Weight Items Detail screen.

The following information can be updated and saved on the Contract Weight Item Detail screen:

- Contract weight scores
- Include contract weight item in score (Yes/No)

When the changes are saved, a message will be displayed to indicate the final calculated score.

Employee Finalises the Overall Evaluation

How to Finalise the Overall Evaluation
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After the Contract Weight Items have been updated and approved, click the **Overall Evaluation** button as shown above.

Approve the Overall Evaluation - Employee

Image not found or type unknown

On this screen the employee is able to add further comments in support of the ratings. Approve the overall evaluation by clicking on the **Approve Performance Year** button.

Manager Finalises the Overall Evaluation

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Select the **Finalised** tab and click the **Overall Evaluation** button as shown above.

Approve the Overall Evaluation - Manager

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The manager has the opportunity to change the Final Scores (RA values) and enter acomment. The manager's comment block will only be visible to the employee after the manager has approved the ratings.

Both the employee and his manager should approve the overall evaluation by clicking on the **Approve Performance Year** button. The overall calculated weighted averages (CWA) and section ratings (RA) have been finalised at this point.

From this moment it is no longer possible for an employee to approve or un-approve this performance contract. Only the manager can open the contact again by clicking on the **Un-approve Performance Year** button - enabled for the manager.

What Happened after the Overall Evaluation was Finalised?

What Happened after the Overall Evaluation was Finalised?
Image not found or type unknown

After the overall evaluation was successfully updated, the Performance Contract Dashboard shows check marks in the Finalise Overall Evaluation section to indicate that the performance agreement is now finalised.

How to Manage Final Scores

The **System Administrator** has the opportunity to revise the agreement final scores on employee's contracts.

How to access an employee's Performance Management Contract to revise?

- *From the portal, click - System Administration | Performance Management | Manage Final Scores*

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How to Select an Employee's Final Score

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Search and select and employee. Click **View/Edit** in the **Action** Column.

How to Edit Final Scores

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Enter the revised final score and click **Save.**

What to do next?

Once the agreement contract for the agreement period has been approved and finalised the next step is an optional moderation process.

The chapter **Performance Management Moderation: Getting Started** describes the purpose and use of the moderation process.

Administrator Manage PM Scorecard

Administrator Working with an Employee's Performance Contract

In the previous chapters we learned how the Performance Management Contract process works from the Manager and Employee's perspective.

An employee's Performance Management Contract can also be accessed by the System Administrator via the Manage Employees Module.

How did I get here?

- *From the portal, click - Manage Employees*

What can I expect in this section?

- How to view, create and modify an employee's performance agreement.

How to Access a Performance Management Agreement via the Manage Employee Module

Login to the Signify HR system. From the Home page navigate to the Manage Employees module.

On the screen *Manage Employees* | *Employee List*, locate the employee whose Performance Management Agreement you want to access.

Click on Employees | Employee Development | Performance Management.

How to Switch Roles between an Employee and the Manager

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How to Switch Roles between an Employee and the Manager

A list of the existing performance contracts for the selected employee is displayed on the screen.

The functionality to switch between the Employee (accessing the PM contract as if you were the employee) and his/her Manager (accessing the PM contract as if you were the employee's manager) is available to the Administrator and can be achieved by clicking on the buttons "Team Member" or "Team Leader" alternatively. A green colored button indicates that you are currently viewing the performance contract in that role.

You will have the opportunity to create a new agreement or modify and approve the agreements as discussed in the previous chapters.

Note that, although you have effectively switched to either the employee or his manager, a full audit trail is kept by whom the changes are being made i.e. you as administrator is making the changes on behalf of an employee or manager. Details of both are kept.

Performance Management Moderation: Getting Started

What is Performance Management Moderation?

The **Performance Management Moderation** process reviews the spread of performance ratings on individuals or groups of employees and looks for apparent abnormalities or inconsistencies in weights, scores and ratings. When abnormalities are identified, a justification for such ratings should be found or an adjustment can be made. Managers, directors and moderating committees are normally the role players that can engage in the moderating process to ensure that consistency of standards is maintained.

The purpose of PM Moderation is to ensure that:

- there is a consistent way of evaluating performance by supervisors;
- everybody understands the standards required at each level of the rating scale;
- the integrity of the PM process is protected.

The PM Moderation module can only be accessed by System Administrators.

How did I get here?

- *From the portal, click - System Administration*

What can I expect in this section?

- How to view the performance ratings.
- How to modify the performance ratings.

What should be in place before the moderation process can commence?

- The performance contracts for the agreement year should be complete and finalised.

Accessing the Moderation Module

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Follow the links as illustrated above.

How to Select a Performance Agreement to be Moderated

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To display a list of applicable performance agreement contracts, enter the selection criteria e.g. Employee Number and click on **Search.**

A list of performance contracts is shown and, for each contract, all the contract's KPA's and KPI's are listed.

How to Preview a Performance Agreement

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Click on the **Preview Agreement** hyperlink to view or print a summary of an employee's performance agreement.

How to Moderate a Performance Agreement

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Enter the new performance ratings and moderation reason and click on the **Save and Recalculate** button.

Administrator: PM Master Data and Templates

How to setup PM Master Data

In the previous chapters we learned how the Performance Management Contract process works from the Manager and Employee's perspective.

The creation and setup of the Performance Management master data can be accessed by the System Administrator.

How did I get here?

- *From the portal, click - System Administration* | *Modules* | *Performance Management*

What can I expect in this section?

- How to view, create and modify the Performance Management master data.

How to Access the Performance Management Master Data

How to Access the Performance Management Master Data
Image not found or type unknown
Login to the Signify HR system. From the Home page navigate to the System Administration | *Modules* | *Performance Management*

The following Performance Management master data is available under the **Administration** menu and will be discussed in the following articles:

- Performance Years,
- Review Frequencies,
- Review Periods,
- Contract Weight Items,
- Review Frequency Sections,
- Key Performance Areas,
- Key Performance Indicators,
- Rating Scales,
- Manage Final Scores,
- Employee Review Frequencies,
- Perspectives,
- Leadership Behaviours,
- Review Periods Exclusion Reason,
- Employee/Manager Instructions, and
- Templates.

Working with the Performance Years Library

Working with the Performance Years Library
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The year period for which performance contracts will be created can be managed on this screen. The **Add** button and **Edit** Icon will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Performance Years Library

Add and Edit Performance Years Library
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When a PM contract is marked as **inactive**, it will not be available for selection when working with contracts in the PM module.

Working with the Review Frequencies Library

Working with the Review Frequencies Library
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Review frequencies are the number of performance assessments within a performance year. The most common review frequencies are Annual, Bi-Annual and Quarterly.

The **Add** button and **Edit** Icon will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Review Frequencies

Add and Edit Review Frequencies
Image not found or type unknown

Working with the Review Periods Library

Working with the Review Periods Library
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Review periods are setup per review frequency. (Example for Bi-Annual: First semester, second semester etc.)

The **Add** button and **View/Edit** hyperlink will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Review Period Details

Add and Edit Review Period Details
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Working with the Contract Weight Items Library

Working with the Contract Weight Items Library
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Contract weight items are additional contract items that can form part of an employee's total contract score. Example is a 360 Survey.

The **Edit** icon will redirect you to the screen below. Records can only be deleted if not already in use.

The assumption is that the performance agreement automatically gets a weighting of 100% - unless one or more additional contract weight items are added. In the example above the 360 review has a weight of 50%, thus automatically setting the performance agreement weight to 50% (100% - 50%) as well.

Add and Edit Contract Weight Items

Add and Edit Contract Weight Items
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Working with the Performance Agreement Section Library

Working with the Performance Agreement Section Library
Image not found or type unknown
The different sections available on a performance agreement are listed. The weight distribution per section can be adjusted here as well as the preferred company terminology of each section.

Working with the Key Performance Areas Library

Working with the Key Performance Areas Library
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Key Performance Areas and Stretch Targets:

- KPA's are the overall scope of activities that an individual has to perform in his job role.
- Stretch targets are challenging but realistic targets that force us to “stretch” our capabilities beyond our usual performance.

The **Add** button and **Edit** link will enable you to enter a description and to indicate if the KPA is to be published. When a KPA is not published, it will not be available for selection when working with a performance contract. Records can only be deleted if not already in use.

Note: As employees prefer to type up new KPA's (and not selecting existing ones from the library), the new KPA is also added to the library but in an unpublished state. The PM system administrator is welcome to sporadically consider any unpublished items and publish them, thus making them available to all system users.

Working with the Key Performance Indicator Library

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Working with the Key Performance Indicator Library

KPI's are the type of performance measurement that acts as a compass, helping you understand how you are performing towards some strategic goals. To be effective, a KPI must be well-defined, quantifiable and be crucial to achieving your goal.

The **Add** button and **Edit** icon will enable you to enter a description and to indicate if the KPI is to be published. When a KPI is not published, it will not be available for selection when working with a performance contract. Records can only be deleted if not already in use.

Note: As employees prefer to type up new KPI's (and not selecting existing ones from the library), the new KPI is also added to the library but in an unpublished state. The PM system administrator is welcome to sporadically consider any unpublished items and publish them, thus making them available to all system users.

Working with the Rating Scales Library

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Working with the Rating Scales Library

In the performance management module, a rating scale is a numeric method in which its options represent degrees of a particular characteristic. In this case when a performance competency is scored.

The **Edit** icon will redirect you to the screen below. Records can only be deleted if not already in use.

Add and Edit Rating Scales

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Add and Edit Rating Scales

Working with the Perspectives Library

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Working with the Perspectives Library

Perspectives can be used for reporting purposes and to categorise KPA’s and stretch targets into smaller groups.

The **View/Edit** link will enable you to enter a description and sort order for perspectives. Perspectives closely correspond to the use of the balanced scorecard pillars.

Working with the Leadership Behaviours Library

Image not found or type unknown
Working with the Leadership Behaviours Library

Leadership behaviours are components in a performance agreement only available to employees in a leadership position.

The **View/Edit** link will enable you to enter a description and sort order for leadership behaviours. Records can only be deleted if not already in use.

How to Change Employee Review Frequencies

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How to Change Employee Review Frequencies

An employee's contract review frequency can be changed with this functionality. This is usually needed in case a contract was initially created with the wrong review frequency. Review frequencies can only be changed from a lower to a higher frequency e.g. from annual to bi-annual, or from bi-annual to quarterly.

The **View/Edit** hyperlink will redirect you to the screen below.

Edit an Employee's Review Frequency

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Edit an Employee's Review Frequency

Working with the Review Periods Exclusion Reason Library

Image not found or type unknown
Working with the Review Periods Exclusion Reason Library

A predefined list with reasons why a review period is to be excluded from an assessment.

Working with PM Contract Instructions

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Working with PM Contract Instructions

The instructions that are visible on the Performance Management Contract screen can be managed here. Instructions can be provided for both the content and scoring phases, and from the perspective of employee and manager.

Working with PM Templates

In the previous chapters we learned how the Performance Management Contract process works from the Manager and Employee's perspective.

We've also learned how an Administrator can create and setup Performance Management master data.

In this section you will learn how to create Performance Management Templates that can be used when creating an employee's PM contract.

How did I get here?

- *From the portal, click - System Administration | Modules | Performance Management*

What can I expect in this section?

- How to view, create and modify a Performance Management Template.

How to Access the Performance Management Templates

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How to Access the Performance Management Templates

Login to the Signify HR system. From the Home page navigate to the System Administration | *Modules | Performance Management*

In the Administration menu, click on **Templates.**

View a List of Templates

View a List of Templates
Image not found or type unknown

A list of existing templates is displayed.

To view or edit an existing template, click on **View/Edit** and continue with the section "How to Edit an Existing Template" below.

How to Add a New Template

How to Add a New Template
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Click on the **Add** button on the Template list screen. Enter the template name and review frequency and click **Continue**.

Image not found or type unknown

Enter the review period description and indicate if this review period's rating should be included in the score calculation. Click **Continue**.

How to Edit an Existing Template

How to Edit an Existing Template
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Click on the **View/Edit** link of the Assessment Period to open the template detail screen discussed in the next article.

How to Manage a Review Period Template

How to Manage a Review Period Template
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Zoom: How to Manage a Review Period Template

The following links are available in the Actions Toolbox:

- **Edit Assessment Period**: This functionality gives you the opportunity to change the Assessment Period Detail.

- **Print Performance Year**: View/Print the Template contents.
- **Add New Perspective:** New KPA's can be added to the template.
- **Add New Key Competency:** New Key Competencies can be added to the template.
- **Add New Stretch Target Perspective:** New Stretch Targets KPA's can be added to the template.

The template contains all the sections necessary to manage a performance contract i.e.

- Key Performance Areas,
- Stretch Targets,
- Company Values and Behaviours,
- Leadership Behaviours and
- Key Competencies.

A checkbox indicates if the template should be published, meaning the template will be made available to copy from, when a new PM contract is created for an employee.

From here the steps to manage a template are the same as discussed in the previous articles.

How to Add a Key Performance Area

Click on the **Add New Key Performance Area** link

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Image not found or type unknown

Enter the a new KPA description or select from the KPA library. Enter the weight for the KPA.

Click **Save an Close** to return to previous screen or **Save Add New** to add another KPA.

Note: The total percentage of all the KPA's weights should be 100%.

The text marked in **red** indicates that this section is still to be completed or the weights do not add up to 100%.

How to Add a Key Performance Indicator

Click on the **Add Key Performance Indicator** link next to the KPA you are working with.

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Image not found or type unknown

Enter the a new KPI description or select from the KPI library. Enter the measures, rating scale and weight for the KPI.

Click **Save an Close** to return to previous screen or **Save Add New** to add another KPI.

Note: The total percentage of all the KPI's weights for each KPA, should be 100%.

The text marked in **red** indicates that this section is still to be completed or the weights do not add up to 100%.

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How to Delete a Key Performance Indicator

Select the check box in the row you want to delete. Click on the **Delete** button.

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How to Delete a PM Template

Open the Performance Agreement Template List

Select the check box in the row you want to delete. Click on the **Delete** button.

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How to Change the Section Weights

Click on the **Change** link in the heading for the different sections.

Note: The total percentage of all the Section weights should be 100% before the template will be saved successfully.

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How to Print a PM Template

Open the Performance Agreement Template List

Click on the **Print** link next to the template you want to print.

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Performance Management Reports

Standard Performance Management Reports

The following standard Performance Management Reports are available:

1. **Assessment Period Content Audit Report**
2. **Calculated Weighted Average Report**
3. **Compare Performance Agreement by Agreement Year Report**
4. **Compare Performance Agreement by Assessment Period Report**
5. **Dump KPAST Report**
6. **Key Competency Report**
7. **Performance Agreement Status Report**
8. **Performance Management Full Report**
9. **Performance Rating Distribution (Agreement Year) Report**
10. **Performance Rating Distribution (Assessment Period) Report**

Assessment Period Content Audit Report

An audit report on all the performance contract changes per employee.

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Assessment Period Content Audit Report

Calculated Weighted Average Report

Provides a consolidated view of the calculated weighted average score per employee per assessment period per agreement for both the pre-moderation and post-moderation scores.

Image not found or type unknown Calculated Weighted Average Report

Compare Performance Agreement by Agreement Year Report

This report compares the final performance rating of any two performance years per employee.

Image not found or type unknown Compare Performance Agreement by Agreement Year Report

Compare Performance Agreement by Assessment Period Report

Compare performance year by review period - compares final scores over 2 periods.

Image not found or type unknown Compare Performance Agreement by Assessment Period Report Performance Agreement by Assessment Period Reportmp KPAST Report

Summary of employee's performance goals and objectives

Image not found or type unknown Dump KPAST Report Zoom: Dump KPAST Report

Key Competency Report

Breakdown per employee of present and required level. Lists employee, manager and agreed rating as well as planned training.

Image not found or type unknown Key Competency Report Zoom: Key Competency Report

Performance Agreement Status Report

Breakdown of agreement statuses - approved/not approved, scores etc. for various periods.

Image not found or type unknown Performance Agreement Status Report

Zoom: Performance Agreement Status Report

Performance Management Full Report

A detailed Excel export report that contains the following information:

- EmployeeNumber
- Surname
- Name
- PositionCode
- PositionTitle
- InternalGrading
- EmploymentType
- StartDateInCompany
- StartDateInGroup
- StartDateInPrimaryPosition
- TerminationDate
- LineManagerEmployeeNumber
- LineManagerNameSurname
- PerformanceManagerEmployeeNumber
- PerformanceManagerNameSurname
- OrgPath
- Performance Year
- Performance Year Start Date
- Performance Year End Date
- Review Frequency
- Number Of Review Periods
- Review Period
- Review Period Start Date
- Review Period End Date
- Item Number

- Perspective
- Theme
- Objective
- Measure
- Target / Rating Scale
- Weight
- Manager Comments
- Employee Comments
- Linked To PDP
- Included In Score
- Manager Rating
- Employee Rating
- Final Rating
- Section Calculated Weighted Average
- Section Revised Average
- Review Period Calculated Weighted Average
- Review Period Revised Average
- Performance Scorecard Calculated Weighted Average
- Performance Scorecard Revised Average

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Performance Management Full Report Zoom: Performance Management Full Report

Performance Rating Distribution Report (Performance Year)

Performance Rating Distribution Report filtered by performance year. Breakdown of total number of employees, number of performance agreements done and breakdown of scores.

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Performance Rating Distribution Report (Performance Year) Zoom: Performance Rating Distribution Report (Performance Year)

Performance Rating Distribution Report (Review Period)

Performance Rating Distribution Report filtered by review period. Breakdown of total performances done during a period and average scores.

Image not found or type unknown

Performance Rating Distribution Report (Review Period)

Performance Rating
Distribution Report (Review Period)

Appendix A - Definitions and Terminology

Definitions, Abbreviations and Acronyms

KPA: Key Performance Area

KC: Key Competency

LB: Leadership Behaviours

VB: Values and Behaviours

KPI: Key Performance Indicator

Performance Agreement: A performance plan or performance agreement is the agreed upon document determining an employee’s scope of work against which he will formally be measured or performance appraised.

Contract: Comprises a performance agreement plus scores from additional components e.g. 360 degree reviews etc.

Agreement Year: A contract is always created for a specific year called the agreement year.

Assessment/Review Period: A performance plan usually consists of one or more review periods e.g. semesters, quarters etc. Within the scope of a performance plan each semester or quarter is called a review period.

Contract Item: All KPA, KC, LB and VB records or items, making up the measurable components of an assessment period on a performance contract are sometimes referred to as the contract items.

Assessment Frequency: How often contract reviews will be held. If the assessment frequency is:

- Annual, there will be 1 review or assessment
- Bi-annual = 2 reviews

- Quarterly = 4 reviews, etc.

CWA: Calculated Weighted Average. The total section score calculated separately for the KPA and KC sections. The weight per contract item is incorporated into this final calculation.

RA: Revised Average. The KPA and/or KC sections’ final scores if manually revised by the employee’s supervisor.

Terminology

Terminology

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Appendix B - Performance Contract Calculations

In order to do a Performance Contract's score calculations, the following settings and assumptions are considered.

Assumptions

If a contract's assessment frequency is set to Annual, the one annual period's weight = 100%
If a contract's assessment frequency is set to Bi-annual, the two periods' weights = 50% respectively. If one period is excluded from the overall contract score, the entire contract score is calculated ignoring the excluded period.
If a contract's assessment frequency is set to Quarterly, the four periods' weights = 25% respectively. If one period is excluded from the overall contract score, the entire contract score is calculated ignoring the excluded period.

Performance Contract Master Data

The relative Section Weights Example
Key Performance Areas (KPA) = 70%
Key Competencies (KC) = 20%
Leadership Behaviours (LB) = 5%
Values and Behaviours (VB) = 5%

The Performance Contract Components' Relative Weights Example
Performance Agreement = 90%
360 Evaluation = 10% (if used)
Any other contract component = x%

A Performance Contract's scores are calculated in the following stages.

1. ASSESSMENT PERIOD SECTION (e.g. KPA) LEVEL

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2. ASSESSMENT PERIOD (e.g. 1st Semester) LEVEL

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3. AGREEMENT LEVEL

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4. CONTRACT LEVEL

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SUMMARY OF CALCULATIONS

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