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

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.



Manage a Performance Agreement/Scorecard



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.

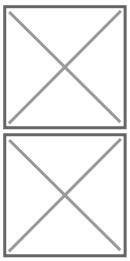
1. A performance year selection.
2. A **Not Started** selection blocks listing all employees with contract not started yet.
3. To display all the employees with contracts that have been started, click on the review frequency block.

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



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



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



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



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



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



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



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



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





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

New KPA Perspective Input

New KPA Perspective Input
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
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
Click on **Add Key Performance Area**.

Key Performance Area Input

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

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

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

Key Performance Indicator Input

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

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



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

Add Personal Development Plan Activities

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



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



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

New Stretch Target Perspective Input

New Stretch Target Perspective Input
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



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



Click on **Add Key Performance Area**.

Stretch Target Key Performance Area Input

Stretch Target 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 Stretch Target Key Performance Area

Edit a Stretch Target 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 Stretch Target Key Performance Indicator

Add a Stretch Target Key Performance Indicator
Click on **Add Key Performance Indicator**.

Stretch Target Key Performance Indicator Input

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



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



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
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



How to Import Leadership Behaviours

Leadership Behaviours
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

- 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

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

New Key Competency Input

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

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

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



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
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

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?

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

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

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



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
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
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?
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



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



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



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

Manager Approves Assessment Period Scores



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



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
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



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

Approve the Overall Evaluation - Employee



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



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

Approve the Overall Evaluation - Manager



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?
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*



How to Select an Employee's Final Score



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

How to Edit Final Scores



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.

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