

Creating a Performance Agreement



The following section will guide you through creating a performance agreement. The guide assumes you do not have an existing agreement for the current performance cycle and that you wish to create one.

- Begin by navigating to the **Performance Management** dashboard.

Performance Management

Search here...

Timeline

January Feb Mar Apr May Jun Jul Aug Sep Oct Nov December

Mid-Year Review

Objective Setting

Check-In

Rating

Final Review

Objective Setting

Check-In

Rating

360° Survey

My Progress

MID-YEAR REVIEW

You: Start Objective Setting.

31 Jan 2026 (3 Weeks Remaining)

START

FINAL REVIEW

You: Start Objective Setting.

30 Jun 2026 (5 Months Remaining)

START

OVERALL SUMMARY :

Mid-Year Review

Final Review

360° Survey

Overall Final Score

0 0 EXCL 0

Scores Check-Ins Scores Check-Ins

- Click **START** to create a new performance agreement.

My Progress

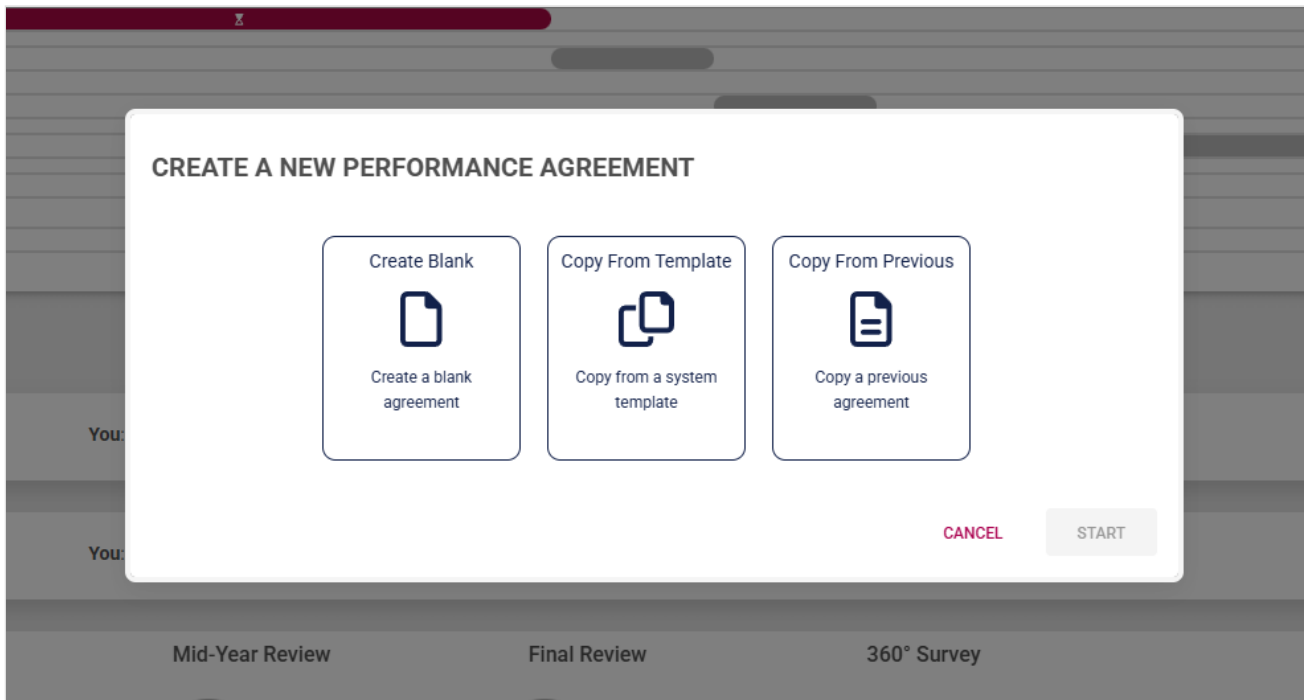
MID-YEAR REVIEW

You: Start Objective Setting.

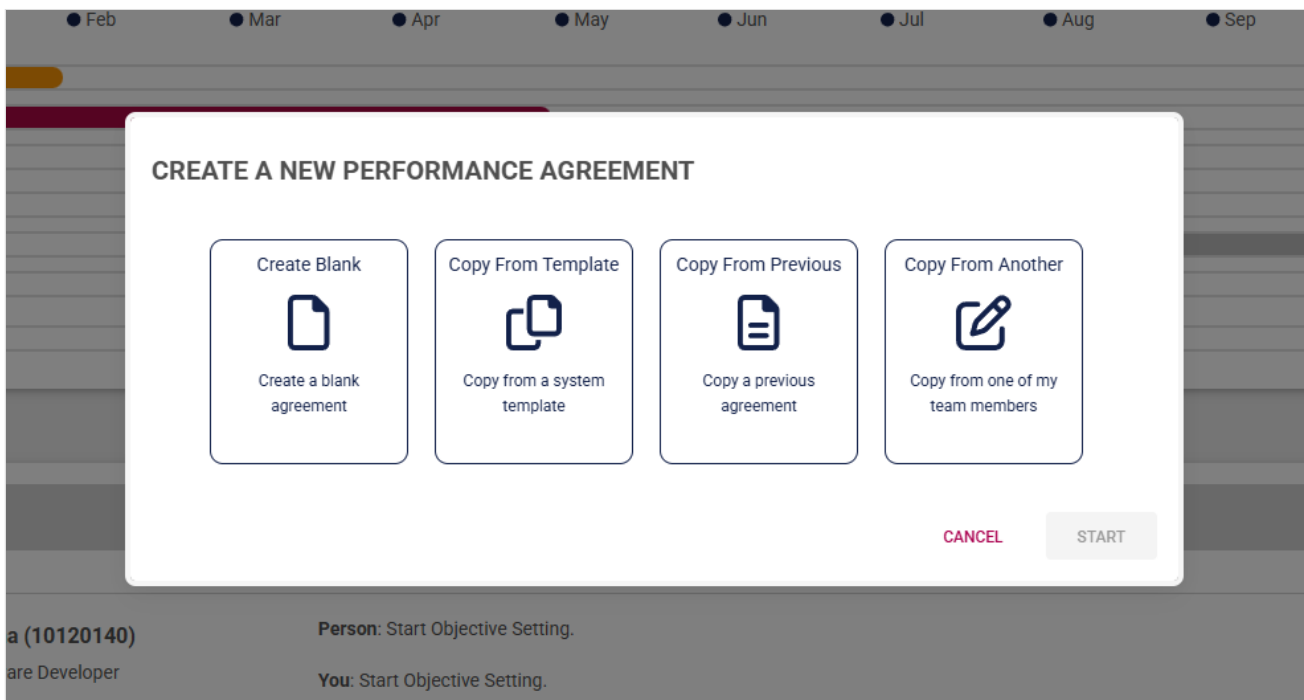
31 Jan 2026 (3 Weeks Remaining)

START

- The **Performance Management** module allows a performance agreement to be created in three ways for employees.



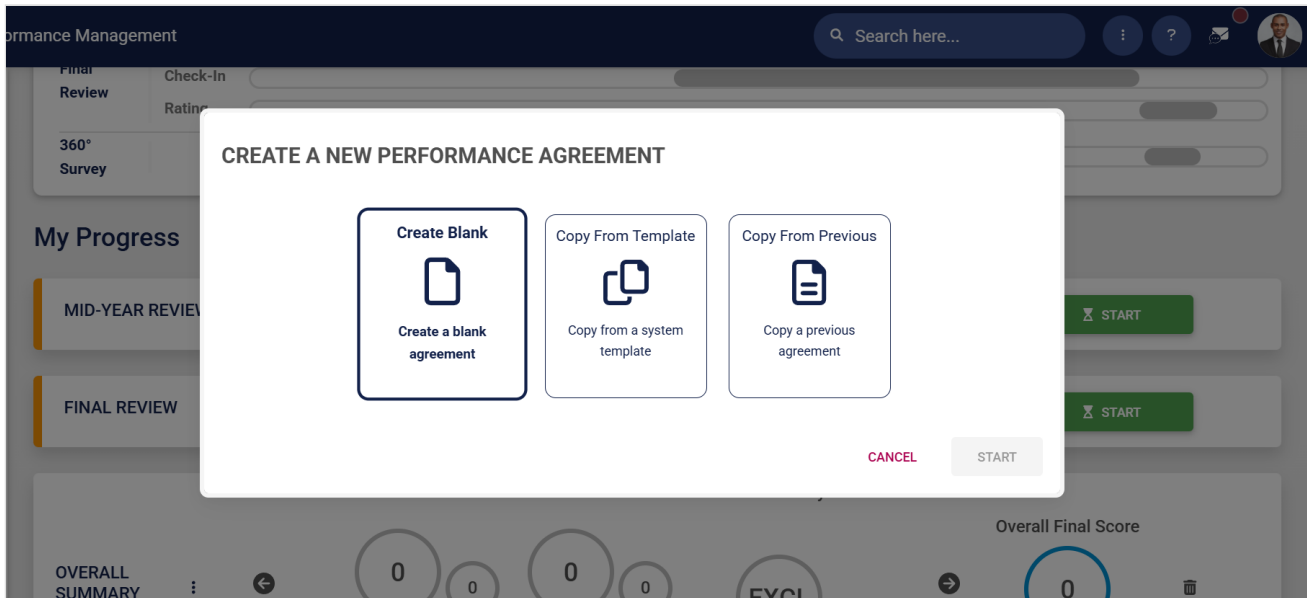
- Managers are offered an additional option to create a performance agreement for a reportee using a template from another team member.



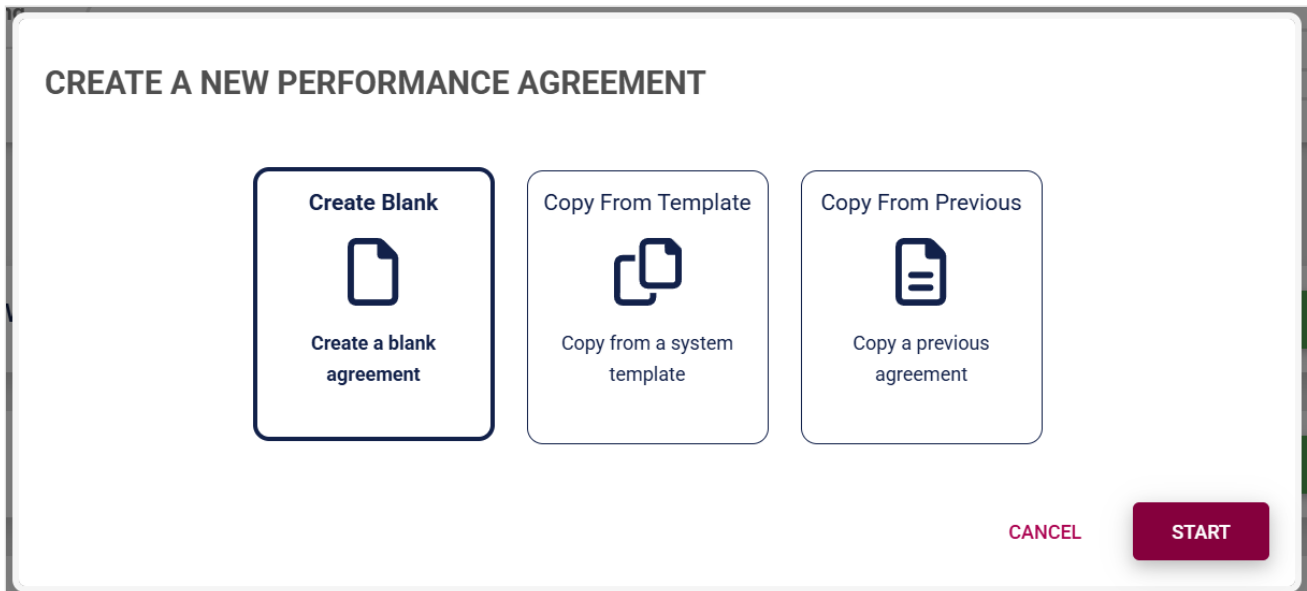
Click on the following tabs to expand the step-by-step instructions.

Create a blank agreement

- Click **Create Blank** to start creating a performance agreement from the beginning.



- Click **START**.



- The performance agreement screen will display, showing the different sections, though it won't include any objectives at this stage. Adding objectives is covered in the next section.

Performance Management | Performance Year 2026 | Mid-Year Review

Search here...

Signify SOFTWARE

EPHRAIM DOHA (10120140)
Junior Software Developer

1 Jun 2024
Christoph Sutherland (10350081)

Current Phase: Objective Setting
Next Action: Complete the Objective Setting.
Agreement created for Employees on 05 Jan 2026

PRIMARY GOALS 66.67%

STRETCH GOALS 22.22%

VALUES & BEHAVIOURS 11.11%

ACTION PLAN

GENERAL COMMENTS

PRIMARY GOALS 66.67%
+ PERSPECTIVE

STRETCH GOALS 22.22%
+ PERSPECTIVE

VALUES & BEHAVIOURS 11.11%

BACK TO DASHBOARD | SUBMIT OBJECTIVES | MORE OPTIONS >>

Use a performance agreement template

- Click **Copy From Template** to create a performance agreement based on a system template.

Performance Management

Search here...

CREATE A NEW PERFORMANCE AGREEMENT

Create Blank
Create a blank agreement

Copy From Template
Copy from a system template

Copy From Previous
Copy a previous agreement

CANCEL | START


Overall Final Score

OVERALL SUMMARY

- Click **START**.


CREATE A NEW PERFORMANCE AGREEMENT

Create Blank




Create a blank agreement

Copy From Template



Copy from a system template

Copy From Previous

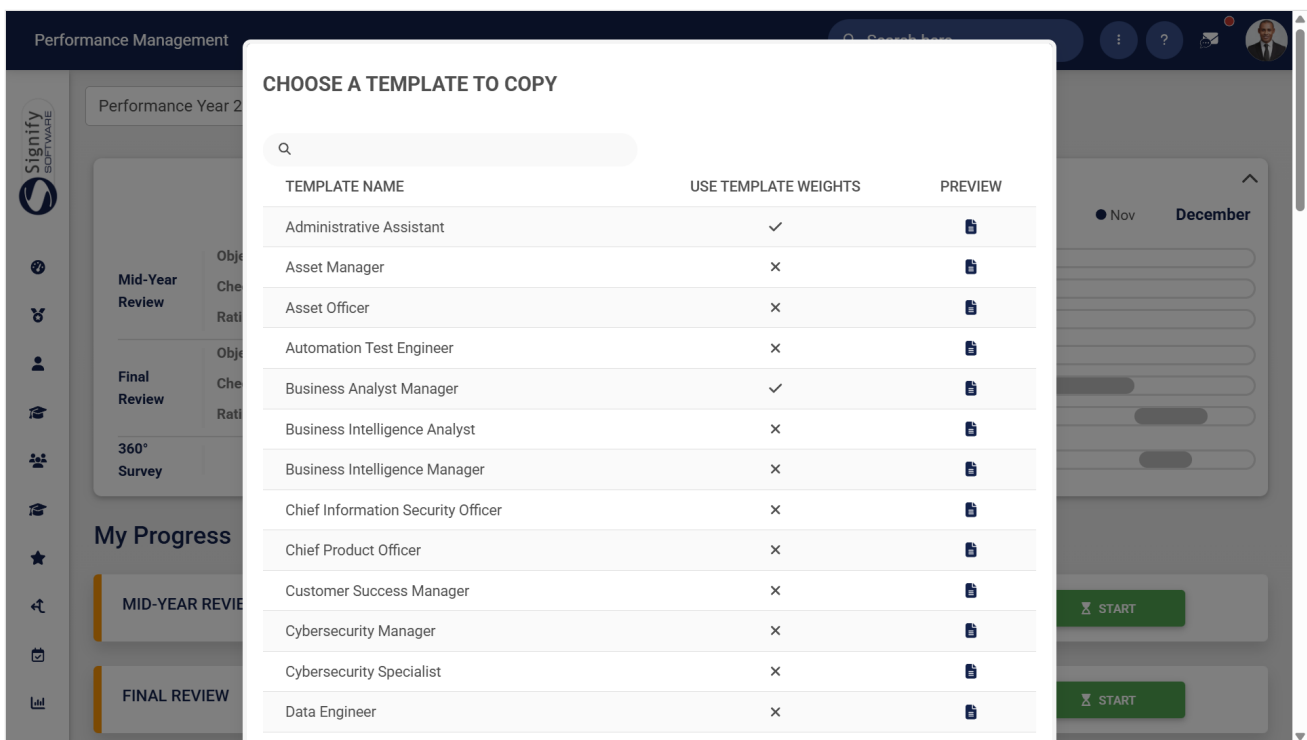















Copy a previous agreement

CANCEL

START

- A list of the templates currently on the system will be shown.



TEMPLATE NAME	USE TEMPLATE WEIGHTS	PREVIEW
Administrative Assistant	✓	
Asset Manager	×	
Asset Officer	×	
Automation Test Engineer	×	
Business Analyst Manager	✓	
Business Intelligence Analyst	×	
Business Intelligence Manager	×	
Chief Information Security Officer	×	
Chief Product Officer	×	
Customer Success Manager	×	
Cybersecurity Manager	×	
Cybersecurity Specialist	×	
Data Engineer	×	

- Use the search bar to search for a template based on a job title or specific keywords.

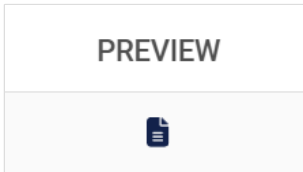
CHOOSE A TEMPLATE TO COPY

Q

- A **tick** will be displayed if the template's weights override the review setup's weights. A **cross** indicates that the review setup's weights will be used.

TEMPLATE NAME	USE TEMPLATE WEIGHTS
Administrative Assistant	✓
Asset Manager	×

- To ensure you select the correct template, you can preview it by clicking the icon. The preview will open in a new tab.



- Choose a template you would like to copy, then click **CREATE**.

CHOOSE A TEMPLATE TO COPY

Q Junior ✕

TEMPLATE NAME	USE TEMPLATE WEIGHTS	PREVIEW
Junior Software Developer	×	
Junior Software Test Analyst	×	

CANCEL
CREATE

- The performance agreement screen will display, with the **Perspective**, **Key Performance Area**, and **Key Performance Indicator** fields filled in from the template.

Performance Management | Performance Year 2026 | Mid-Year Review

Search here...

Signify SOFTWARE

EPHRAIM DOHA (10120140)
Junior Software Developer

PRIMARY GOALS 66.67%

- Development Skills Perspective
 - Enhance Code Quality
 - Improve Coding Skills
- Collaboration Perspective
 - Enhance Communication Skills
 - Improve Team Collaboration

STRETCH GOALS 22.22%

- Innovation Perspective
 - Adopt New Technologies
 - Enhance Mobile Development Skills
- Process Improvement Perspective
 - Enhance Testing and QA Integration
 - Optimize Development Processes

PRIMARY GOALS 66.67%

+ PERSPECTIVE

Development Skills Perspective 50%

+ KEY PERFORMANCE AREA

Enhance Code Quality 50%

KEY PERFORMANCE INDICATOR	PERSON COMMENT	MANAGER COMMENT	Total:
Increase unit test coverage			100%
Activities			50%
Measures & Ratings			
Reduce code review rejections			

BACK TO DASHBOARD | SUBMIT OBJECTIVES | MORE OPTIONS >>

Copy from a previous agreement

- Click **Copy From Previous** to create a performance agreement based on an agreement from a previous performance cycle.

Performance Management

Search here...

CREATE A NEW PERFORMANCE AGREEMENT

- Create Blank
 - Create a blank agreement
- Copy From Template
 - Copy from a system template
- Copy From Previous
 - Copy a previous agreement

CANCEL | START


Overall Final Score

OVERALL SUMMARY

- Click **START**.


CREATE A NEW PERFORMANCE AGREEMENT

Create Blank




Create a blank agreement

Copy From Template



Copy from a system template

Copy From Previous




Copy a previous agreement

CANCEL

START

- A list of the performance agreements from previous review periods will be shown.

COPY FROM A PREVIOUS REVIEW PERIOD

REVIEW PERIOD	START DATE	END DATE	REVIEW YEARS	PREVIEW
Mid-Year Review	6 Jan 2025	30 Jun 2025	Performance Year 2025	

CANCEL

CREATE


- To ensure you select the correct performance agreement, you can preview it by clicking the icon. The preview will open in a new tab.

PREVIEW



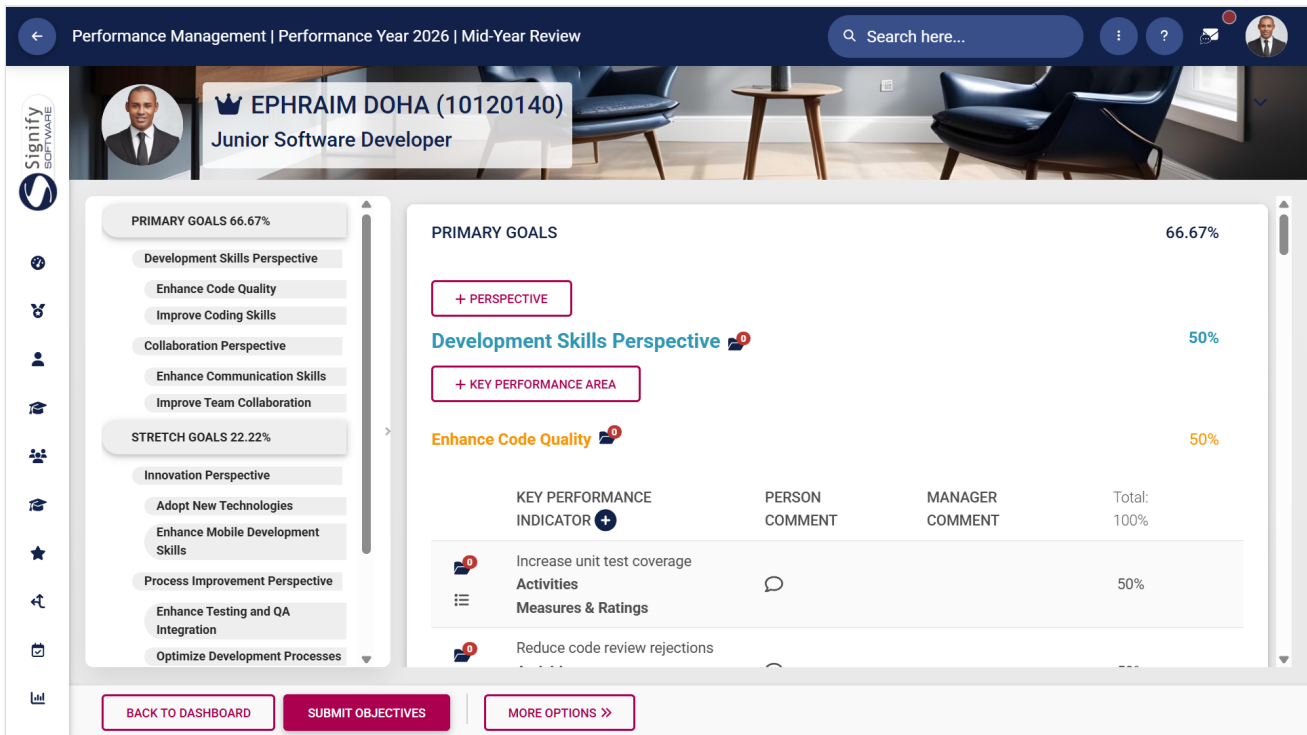
- Select the performance agreement you would like to copy, then click **CREATE**.

COPY FROM A PREVIOUS REVIEW PERIOD

REVIEW PERIOD	START DATE	END DATE	REVIEW YEARS	PREVIEW
Mid-Year Review	6 Jan 2025	30 Jun 2025	Performance Year 2025	

[CANCEL](#) [CREATE](#)

- The performance agreement screen will display, with the **Perspective**, **Key Performance Area**, and **Key Performance Indicator** fields filled in from the previous agreement.



Performance Management | Performance Year 2026 | Mid-Year Review

Search here...

EPHRAIM DOHA (10120140)
Junior Software Developer

PRIMARY GOALS 66.67%

- Development Skills Perspective
 - Enhance Code Quality
 - Improve Coding Skills
- Collaboration Perspective
 - Enhance Communication Skills
 - Improve Team Collaboration

STRETCH GOALS 22.22%

- Innovation Perspective
 - Adopt New Technologies
 - Enhance Mobile Development Skills
- Process Improvement Perspective
 - Enhance Testing and QA Integration
 - Optimize Development Processes

PRIMARY GOALS 66.67%

+ PERSPECTIVE

Development Skills Perspective 50%

+ KEY PERFORMANCE AREA

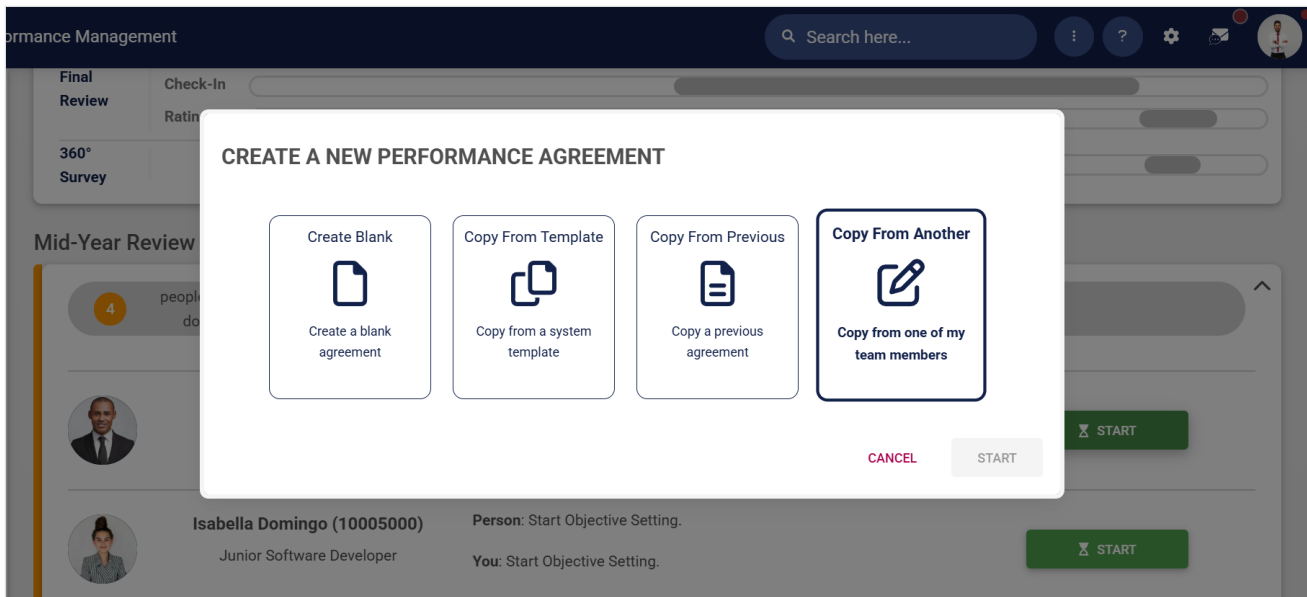
Enhance Code Quality 50%

KEY PERFORMANCE INDICATOR	PERSON COMMENT	MANAGER COMMENT	Total
Increase unit test coverage			100%
Activities Measures & Ratings			50%
Reduce code review rejections			...

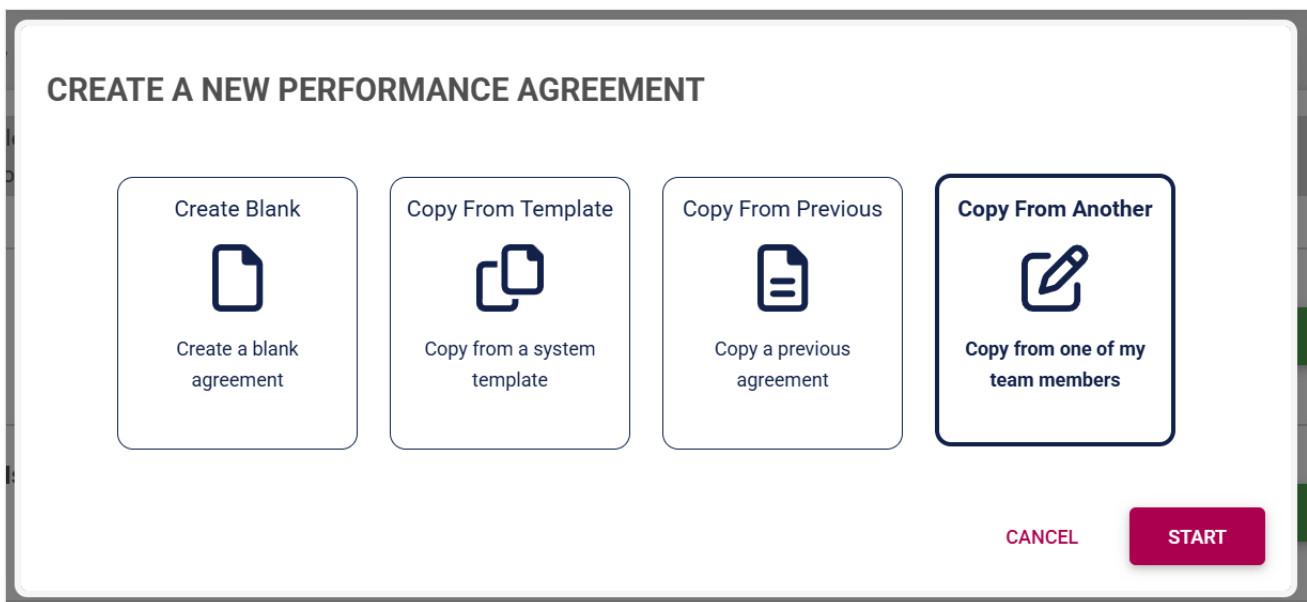
[BACK TO DASHBOARD](#) [SUBMIT OBJECTIVES](#) [MORE OPTIONS >>](#)

Copy an agreement from another employee (Managers only!)

- Click **Copy From Another** to create a performance agreement based on another employee's agreement.









- Click **START**.



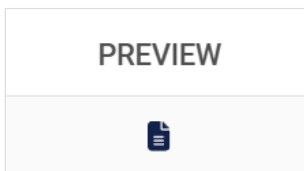
- A list of the other employees in your team's performance agreements will be shown. These agreements are from the current and previous review periods.

COPY FROM ONE OF MY PEOPLE

PERSON	REVIEW YEARS	REVIEW PERIOD	PREVIEW
 Ephraim Doha (10120140)	Performance Year 2025	Mid-Year Review	
 Ephraim Doha (10120140)	PM Demos 2026	Midyear Review	
 Isabella Domingo (10005000)	Performance Year 2026	Mid-Year Review	







[CANCEL](#) [CREATE](#)

- To ensure you select the correct performance agreement, you can preview it by clicking the icon. The preview will open in a new tab.



- Select the performance agreement you would like to copy, then click **CREATE**.

COPY FROM ONE OF MY PEOPLE


PERSON	REVIEW YEARS	REVIEW PERIOD	PREVIEW
 Ephraim Doha (10120140)	Performance Year 2025	Mid-Year Review	
 Ephraim Doha (10120140)	PM Demos 2026	Midyear Review	
 Isabella Domingo (10005000)	Performance Year 2026	Mid-Year Review	

[CANCEL](#) [CREATE](#)

- The performance agreement screen will display, with the **Perspective**, **Key Performance Area**, and **Key Performance Indicator** fields filled in from the other employee's performance agreement.

Performance Management | Performance Year 2026 | Mid-Year Review

Search here...

 **CLINTON KAZHILA (10006000)**
Junior Software Developer

PRIMARY GOALS 66.67%

- Development Skills Perspective
- Enhance Code Quality
- Improve Coding Skills
- Collaboration Perspective
- Enhance Communication Skills
- Improve Team Collaboration

STRETCH GOALS 22.22%

- Innovation Perspective

PRIMARY GOALS 66.67%

- [+ PERSPECTIVE](#)
- Development Skills Perspective** 50%
- [+ KEY PERFORMANCE AREA](#)
- Enhance Code Quality** 50%

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