

# 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

Scores Check-Ins

0 0

Scores Check-Ins

EXCL

0

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

My Progress

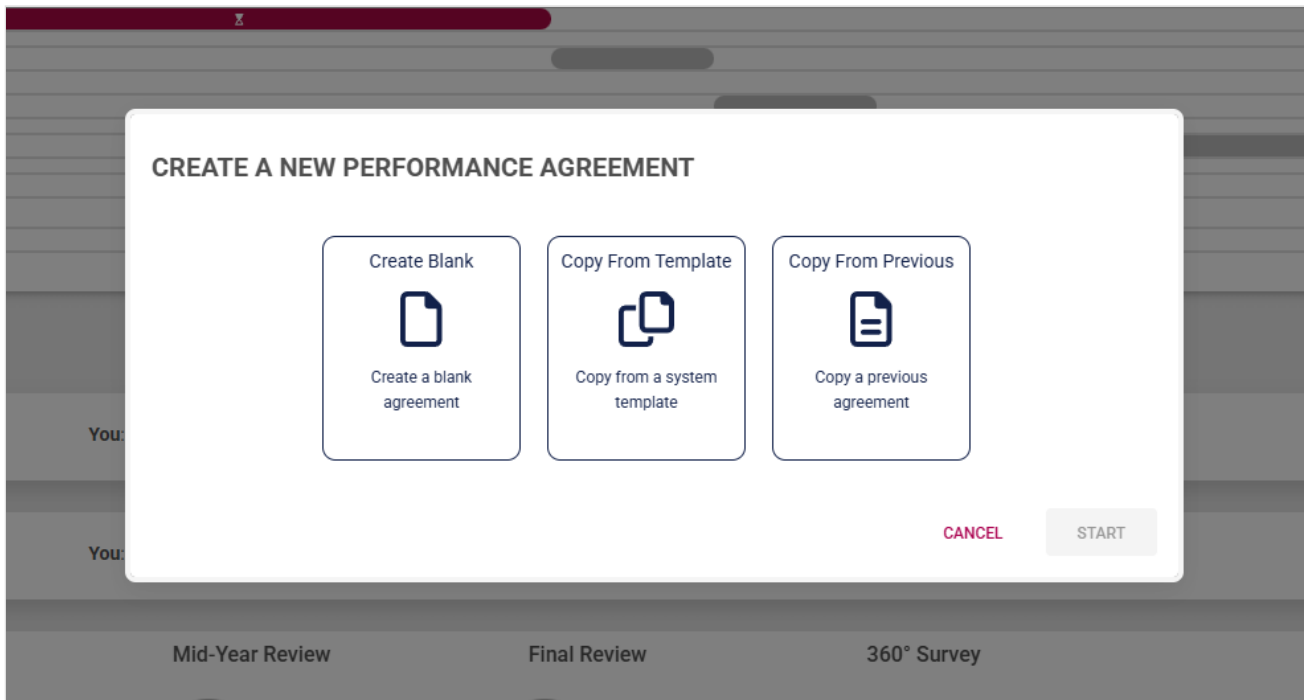
MID-YEAR REVIEW

You: Start Objective Setting.

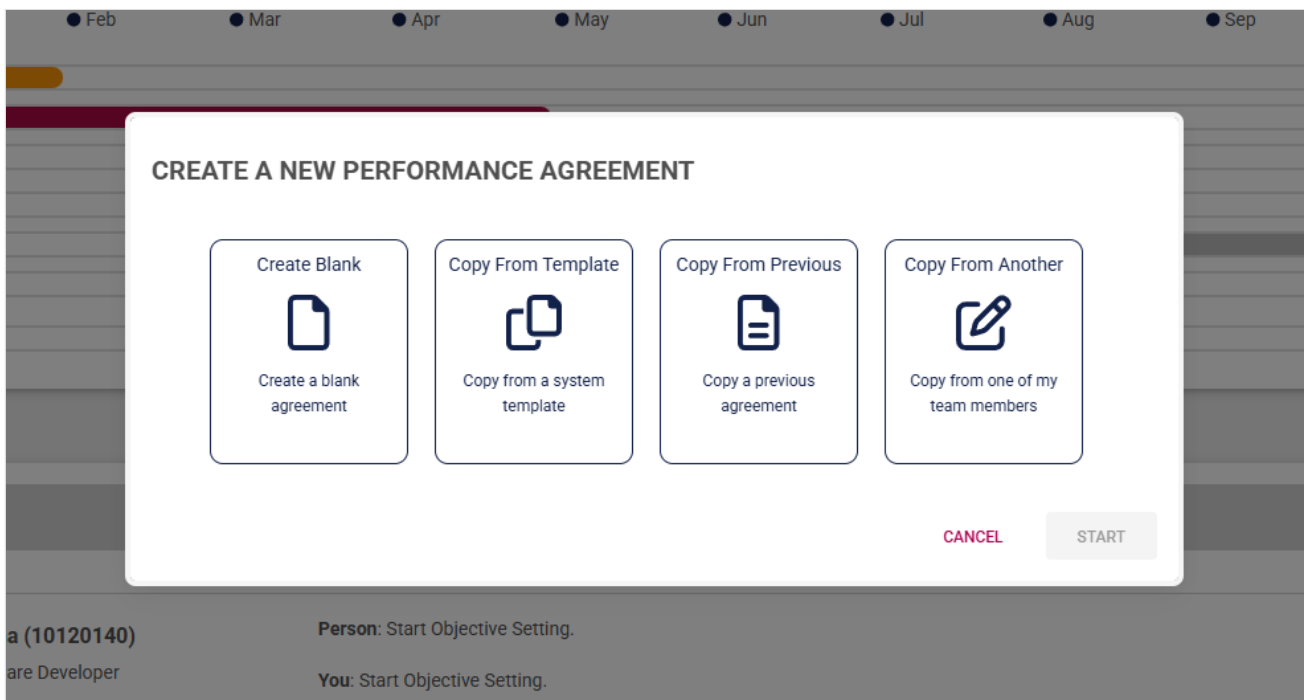
31 Jan 2026 (3 Weeks Remaining)

START

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



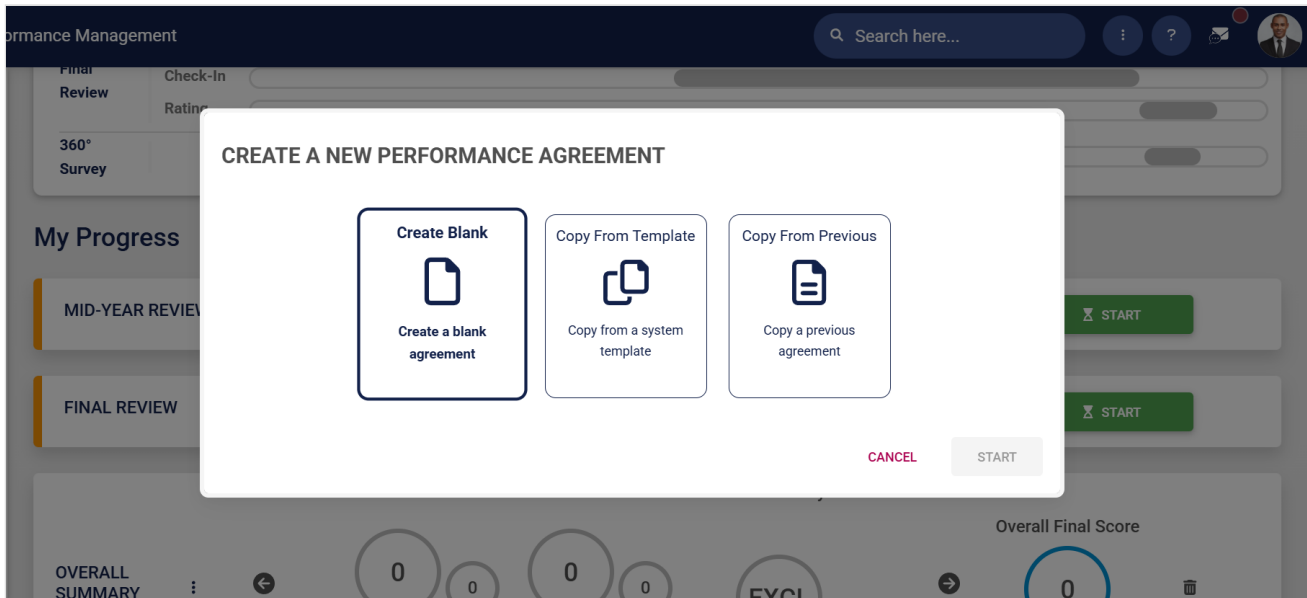
- Managers are offered an additional option to create a performance agreement for a reportee using a template from another team member.



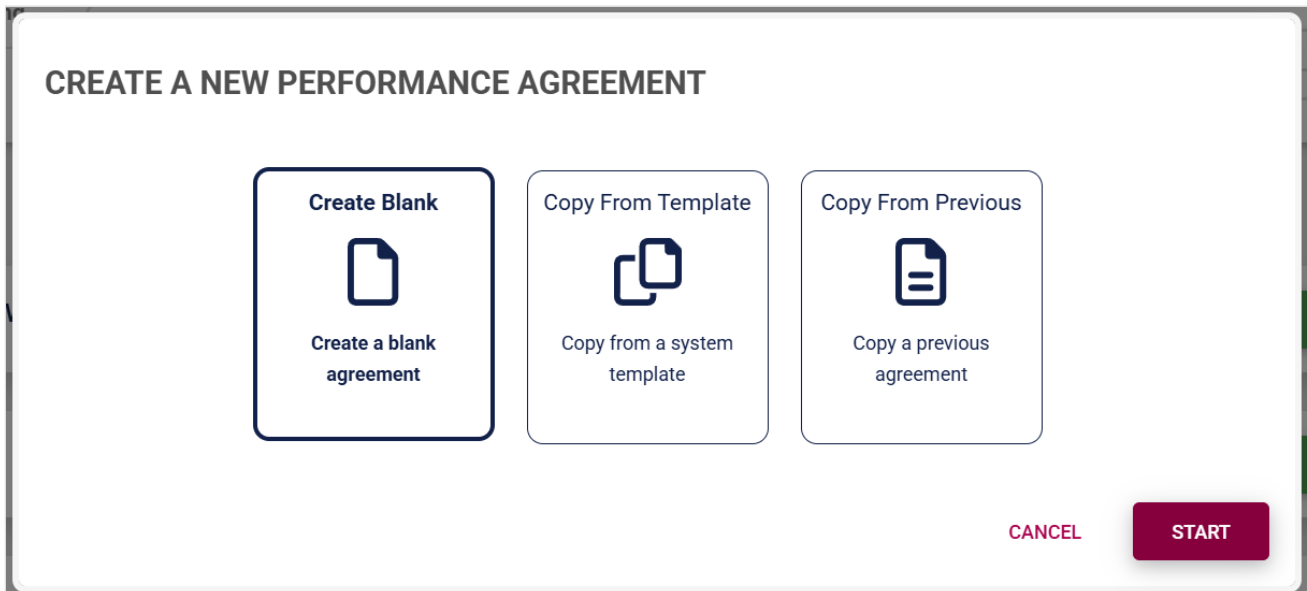
Click on the following tabs to expand the step-by-step instructions.

### 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

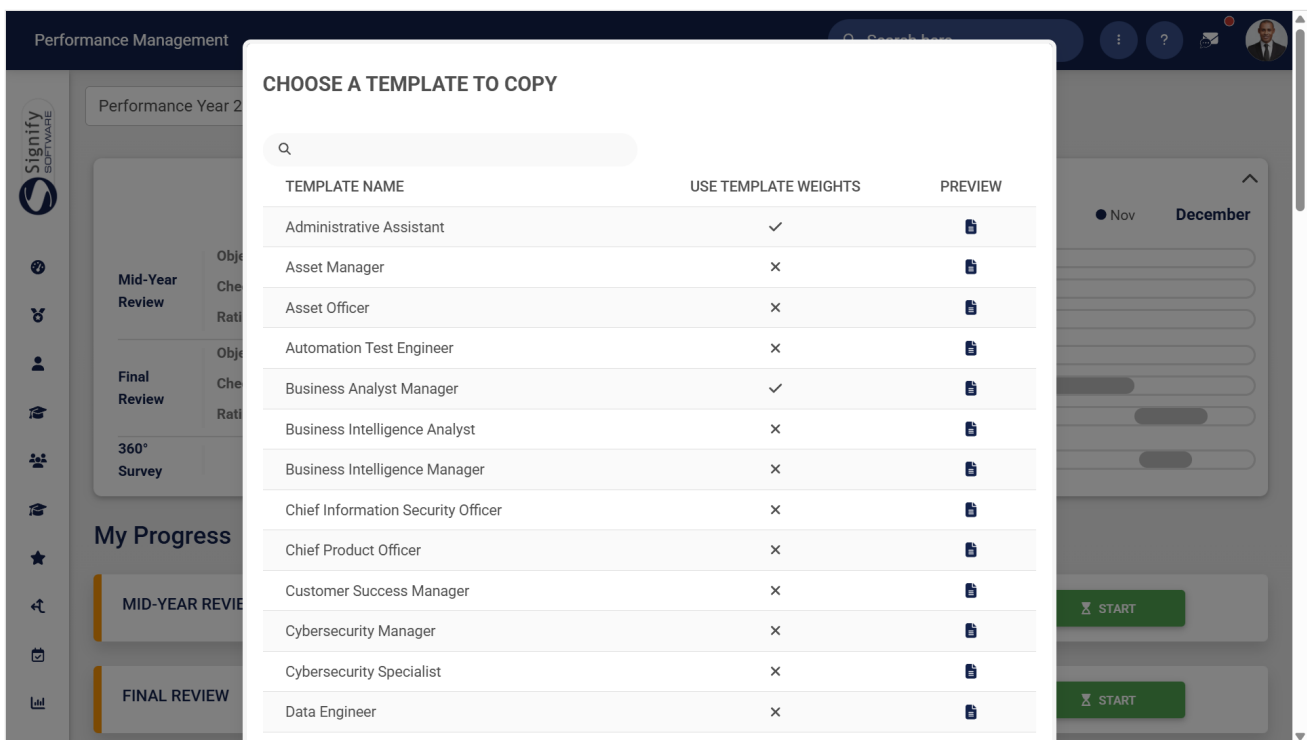















Copy a previous agreement

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.

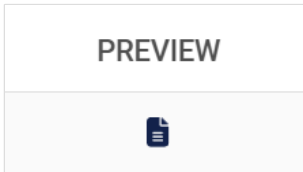
### CHOOSE A TEMPLATE TO COPY

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, click the **PREVIEW icon** to view. 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...

Final Review

Check-In

Rating

360° Survey

My Progress

MID-YEAR REVIEW

FINAL REVIEW

START

START


Overall Final Score

OVERALL SUMMARY

0 0 0 0 EXCI 0


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

- 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, click the **PREVIEW icon** to view. The preview will open in a new tab.

PREVIEW



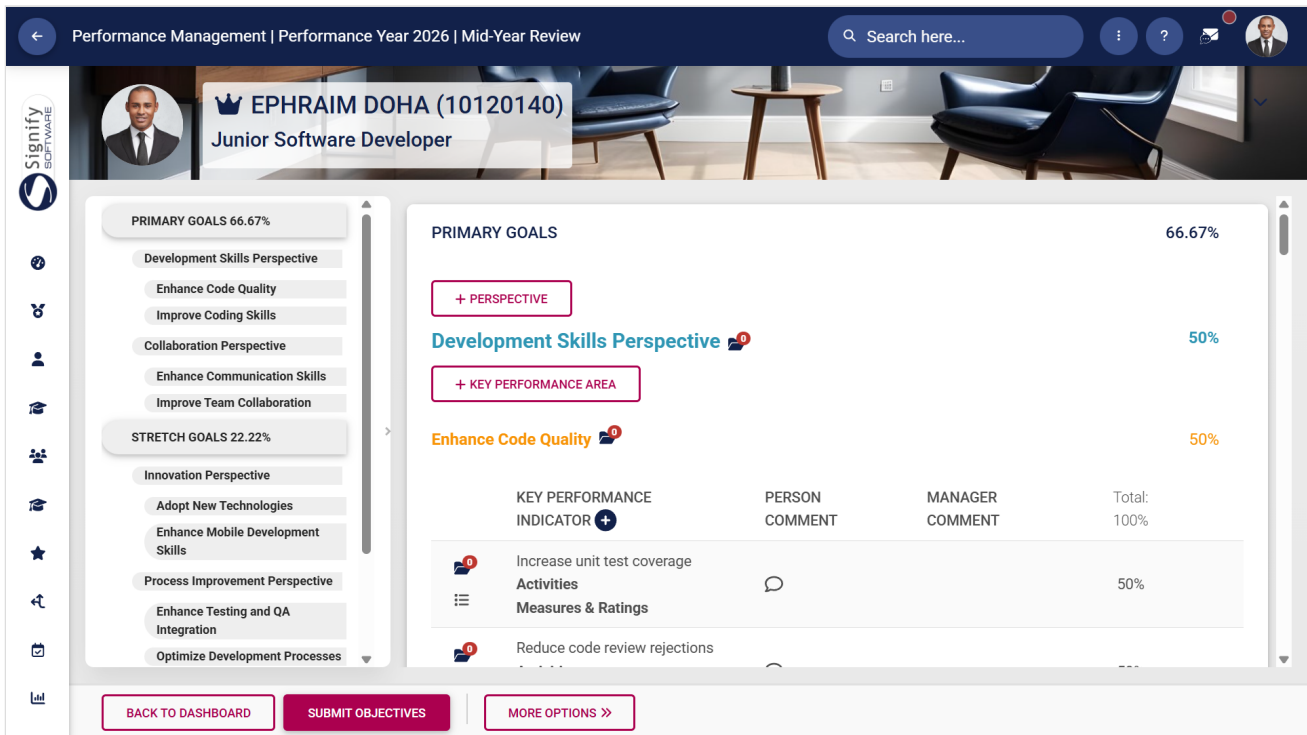
- Select the performance agreement you would like to copy, then click **CREATE**.

## 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

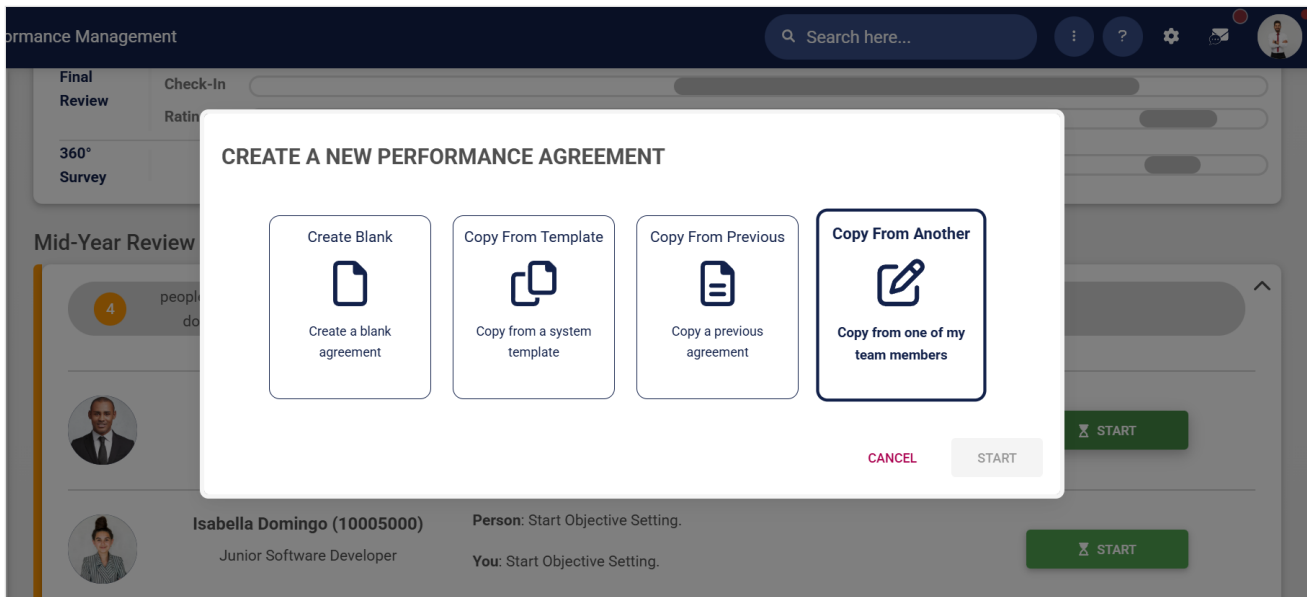
Enhance Code Quality 50%

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

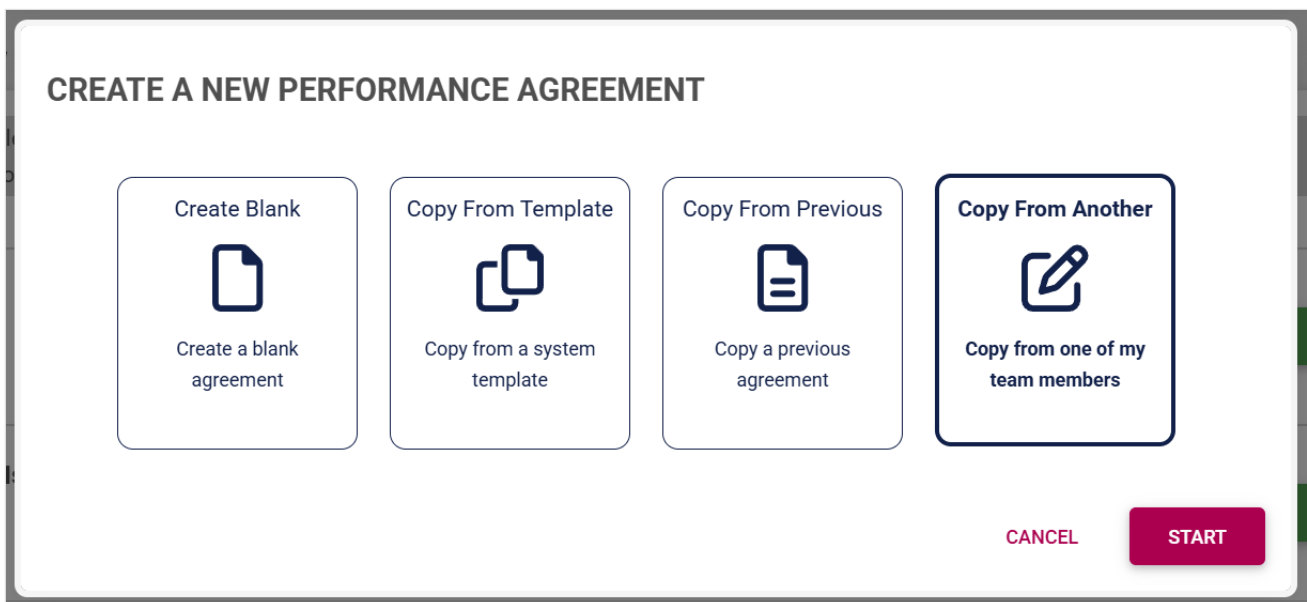
[BACK TO DASHBOARD](#) [SUBMIT OBJECTIVES](#) [MORE OPTIONS >>](#)

## 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**.



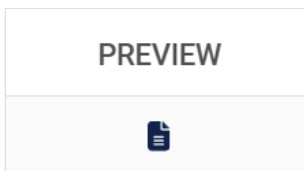
- A list of the other employees in your team's performance agreements will be shown. These agreements are from the current and previous review periods.

## 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, click the **PREVIEW icon** to view the agreement. 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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Revision #23

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