

Appraisals – A User guide

Appraisals are known as Performance Review forms (or PR Forms) in CompanyControls.

Where are my PR Forms (Appraisals)?

My Details > performance > Review > List

This page is split into three boxes. The search box at the top will search and display the information in the second and third boxes. Initially this is set to only show Open PR Forms. Change the status to see completed, withdrawn and cancelled PR Forms.

My Performance Reviews lists all the PR Forms that have been issued directly to you. These are your Appraisals and Performance Reviews.

The box below lists PR Forms where you are named as the primary Reviewer most commonly the group manager.

Performance Reviews linked to Me as either the reviewed or the reviewer

Perf Rev Type: Status: For Period Year: For Period Mth:

PR Form Ref:

My Performance Reviews (6)

Perf Review Ref	Performance Review Type	Performance Review Form	By Primary Reviewer	Status	For Period Year	For Period Mth	Review As Of	Review Completed	Measured Score	Review Next
EDIT PR001085	New Starter	PRF0001 EXAMPLE	Porter group manager.L	In Progress			07/03/13			
EDIT PR001082	Perf Appraisal with Goals	PRF0005 EXAMPLE - #1 - Continuation	LovelockXYZ123_3	New			31/03/13			
EDIT PR001093	Perf Appraisal	PRF1001 Ellis Whittam - Directors Managers PA 10	LovelockXYZ123_3	New			20/03/13			
EDIT PR001098	Perf Appraisal	PRF1013 Example Question Layouts	Porter group manager.L	New			29/04/13			
EDIT PR001087	Perf Improvement	PRF0013 EXAMPLE - #1 - Initialise	LovelockXYZ123_3	New			21/03/13			
EDIT PR001089	Career Enhancement	PRF0019 EXAMPLE - #1 - Initialise	LovelockXYZ123_3	New			29/03/13			

Performance Reviews as the named Primary Reviewer (1)

Perf Review Ref	Performance Review Type	Performance Review Form	Home Group	Review For	Status	For Period Year	For Period Mth	Review As Of	Review Completed	Measured Score	Review Next
EDIT PR001100	Perf Appraisal with Goals	PRF0004 EXAMPLE - #1 - Initialise	Directors	Michaels.RK	New			23/04/13			

How to complete your PR Form

When you are issued with a PR Form such as an annual appraisal you will receive an email which will include a link to the PR Form.

Alternatively you can go to My Details > Performance > Review > List. Ensure that the search status is showing *Open* PR Forms and click the Edit link next to the appraisal you wish to start completing in the 'My Performance Reviews' box.

My Performance Reviews (6)											
Perf Review Ref	Performance Review Type	Performance Review Form	By Primary Reviewer	Status	For Period Year	For Period Mth	Review As Of	Review Completed	Measured Score	Review Next	
EDIT PR001085	New Starter	PRF0001 EXAMPLE	Porter group manager.L	In Progress			07/03/13				
EDIT PR001082	Perf Appraisal with Goals	PRF0005 EXAMPLE - #1 - Continuation	LovelockXYZ123_3	New			31/03/13				
EDIT PR001093	Perf Appraisal	PRF1001 Ellis Whittam - Directors Managers PA 10	LovelockXYZ123_3	New			20/03/13				
EDIT PR001098	Perf Appraisal	PRF1013 Example Question Layouts	Porter group manager.L	New			29/04/13				
EDIT PR001087	Perf Improvement	PRF0013 EXAMPLE - #1 - Initialise	LovelockXYZ123_3	New			21/03/13				
EDIT PR001089	Career Enhancement	PRF0019 EXAMPLE - #1 - Initialise	LovelockXYZ123_3	New			29/03/13				

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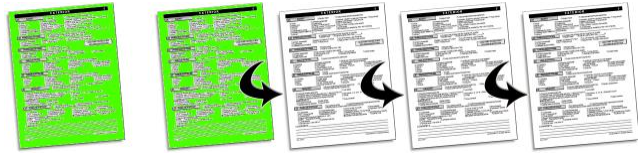
This will open the PR Form to be completed. It comprises 3 areas:

Performance Review Summary	<p>Most Users will not be able to update the information in this area, this is restricted to the Primary Reviewer and PR Admins.</p> <p>The Digitally Sign facility is available to confirm that the PR Form is complete and that they agree to its contents. Once Digitally Signed it is locked from changes by that person.</p> <p>At the bottom of the Summary area there are navigation links to any PR Forms that came before and after the current PR Form (i.e. last year's annual appraisal).</p> <p>A Print button is available to print the current Submitted state of this PR Form. This is useful for taking this information into a 1-2-1.</p>
Performance Review Completeness	<p>Some answers can be set as required. While this does NOT make them mandatory it does highlight them in this area and against the answer where a mark appears next to the question to alert the user of a required answer. (T) = Required Comment (S) = Required Score (Radio button).</p> <p>Questions and answers may be specified to be completed by either the employee or the primary reviewer (manager) or both. This is also marked against the answer.</p> <div data-bbox="603 1025 1390 1167" style="border: 1px solid #ccc; padding: 5px;"> <p>Desire to Improve Quality (S) [REVIEWER to Update]</p> <p><small>Continually looks for ways to improve and promote quality. Applies feedback to improve performance.</small></p> <p> <input type="radio"/> Exceptional - 5 <input type="radio"/> Exceeds Expectations - 4 <input type="radio"/> Meets Expectations - 3 <input type="radio"/> Below Expectations - 2 <input type="radio"/> Needs Improvement - 1 <input type="radio"/> Not Applicable </p> </div> <p>This area can be temporarily hidden by using the Hide link next to the title of this box.</p>
Performance Review	<p>This is the main area to be completed by the employee and the primary Reviewer (group manager).</p> <div data-bbox="592 1395 1412 1469" style="background-color: #f08080; padding: 5px;"> <p>IMPORTANT: IT IS ESSENTIAL THAT YOU USE THE <u>SUBMIT BUTTON</u> AT THE BOTTOM OF THE PR FORM TO SAVE ANY CHANGES.</p> </div> <p>If you update a question that is marked for use by someone else it <u>will not be saved</u>.</p> <p>Submitting your PR Form will change the status from New to In progress.</p> <p>When you are happy with the answers should you Digitally Sign off the PR Form which will change the Status to In Progress – with Reviewer. The primary Reviewer will also receive an email.</p>

How to issue a PR Form (Manager)

Where the PR Form is a one-off or the start of a series

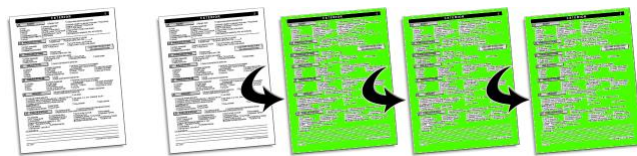
In these cases go to My Details > Groups > Employee name > Performance > Review > Add. Choose the PR Form to issue, complete the remaining part of the Form and click Add.



Alternatively go to my Details > Groups > Group name > Performance > Review > Add and follow the same procedure as above. This way will allow you to issue more PR Forms more quickly.

Where the PR Form is a subsequent one

These PR Form will not be available in any Add screen. In order to issue a subsequent PR Form the first completed one must be found. To do this go to My Details > Groups > Employee name >



Performance > Reviews > List and ensure that the status is showing Completed PR Forms. The list of completed Forms will each have a 'Create Next' link next to them. This will open an Add form that will list all the PR Forms that can follow the last one.

An option is available when setting up the PR Forms to allow the owners of the PR Form to Create the next form for themselves. If available, this is done by going to My Details > Performance > Reviews > list and ensure the status is Completed. If available the Create Next link will show next to 'My Performance Reviews'.

My Performance Reviews (7)											
	Perf Review Ref	Performance Review Type	Performance Review Form	By Primary Reviewer	Status	For Period Year	For Period Mth	Review As Of	Review Completed	Measured Score	Review Next
VIEW	PR001060	Perf Appraisal with Goals	PRF0004 EXAMPLE - #1 - Initialise	LovelockXYZ123_ J	Completed			26/12/12	19/12/12	5	31/12/13
VIEW	PR001065	Perf Appraisal with Goals	PRF0005 EXAMPLE - #1 - Continuation	LovelockXYZ123_ J	Completed			31/12/13	20/12/12		
VIEW	PR001066	Perf Appraisal with Goals	PRF0005 EXAMPLE - #1 - Continuation	LovelockXYZ123_ J	Completed			27/12/12	21/12/12		
VIEW CREATE NEXT	PR001067	Perf Appraisal with Goals	PRF0021 EXAMPLE - #2 - Initialise	Porter manager.L	Completed			21/12/12	23/04/13		
VIEW CREATE NEXT	PR001095	Perf Appraisal	PRF1013 Example Question Layouts	Porter group manager.L	Completed			15/04/13	15/04/13		
VIEW CREATE NEXT	PR001096	Perf Appraisal	PRF1013 Example Question Layouts	Porter group manager.L	Completed			15/04/13	15/04/13		
VIEW	PR001097	Perf Appraisal	PRF1013 Example Question Layouts	Porter group manager.L	Completed			15/04/13	15/04/13		