

Performance Appraisal System

A Resource Guide for Employee

Version 1.0



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The Performance Management Framework

Phases of the Performance Management Process

Step 1 - Performance Planning

At the beginning of the appraisal period, the manager and employee review the principal responsibilities of the job, identify Company objectives and team objectives, decide upon projects and discuss standards of performance.

After reviewing Company and team objectives for the coming year, the manager and employee work together to define performance expectations that align with team and Company objectives. Based on the performance expectations, the employee and manager create S.M.A.R.T objectives to address the employee's personal and



professional development. They then create a detailed plan with interim milestones to help monitor the employee's progress toward achieving their objectives.

Step 2 - Mid-Year Performance Review

At approximately June each year, the manager completes a *Mid-Year Performance Review* of the employee's performance related to the documented performance expectations and objectives. The mid-year discussion is a more formal opportunity for the manager and employee to discuss progress against objectives, discuss demonstration of particular competencies and identify any changes in general/timelines or obstacles if any that need to be made to the objectives. The manager, based on the employee's performance year to date, will provide a mid-year rating for the employee as well as comment on the employee's performance. The employee will also comment on their mid-year performance.

Step 3 - Annual Performance Review

At the end of the performance year (December), the manager completes the Annual Performance Review. The annual performance review is an assessment of the employee's performance against the years' objectives, assessing their performance against each competency and then determining an overall rating for the year. The employee will also have the opportunity to comment on the overall rating. The review and subsequent discussion is conducted in conjunction with the employee.

On-Going Coaching and Feedback

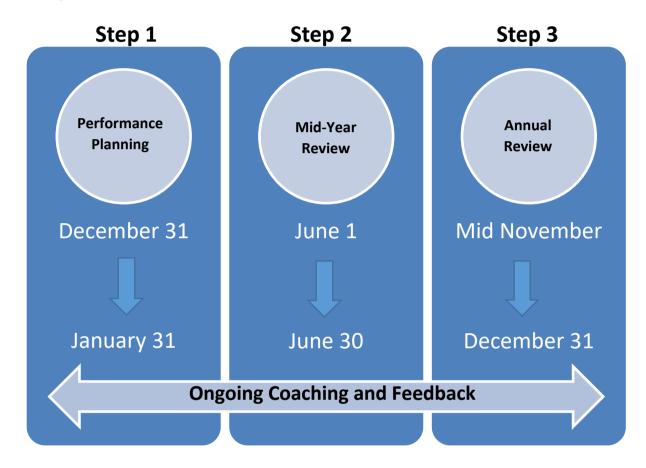
Throughout the year, the manager provides ongoing feedback on the employee's performance and the employee proactively solicits feedback to ensure that performance is in line with expectations. Both the employee and manager provide objective information to identify areas of strength and



areas for improvement throughout the year. Effective coaching and feedback stems from open, ongoing communication between the manager and employee based on honesty, objectivity and continuous improvement.

Performance Management Timeline

All Managers are required to follow the following timeline with regard to the *Performance Management Process*:



What is the Manager's Role in the Performance Process?

The Manager's role in the Performance Management Process includes:

- Using the Performance Management Process to give ongoing feedback to employees and to assess performance
- Working with employees to set objectives for continuous improvement and to monitor performance against those objectives
- Reinforcing good performance with appropriate reward and recognition and dealing appropriately with poor performance
- Training, coaching and developing employees

To carry out this role successfully, Manager's need to:



- Communicate the big picture of the departments and Company's goals to employees and show the relationship between their job and the Company's success
- Let employees know what is expected from them and why
- Help employees to establish challenging but realistic objectives and work with employees to help them achieve their objectives
- Identify competency levels needed for achieving high quality results
- As a minimum, conduct at least one Mid-Year discussion with each employee to monitor progress and to modify objectives and plans as needed
- Conduct an Annual Performance Review discussion with each employee
- Identify employee development needs and implement specific development strategies based on those needs.

What is the Employee's Role in the Performance Process?

The employee must take an active role to achieve performance excellence. The employee's role includes:

- Initiating challenging but realistic objectives that support the Turosi strategy and department goals
- Taking responsibility for their own continuous performance improvement and development
- Creating action plans and following through to achieve objectives
- Informing their manager when they need information, help or advice to meet their objectives
- Monitoring their own performance by actively soliciting feedback from others
- Asking their manager for regular feedback on performance throughout the year and initiating suggestions for improvement
- Keeping their manager informed about progress toward accomplishing their objectives and demonstrating competence
- Keeping their manager informed of any problems or potential problems which may impact their ability to perform up to expectations.



Performance Appraisal System

Introduction

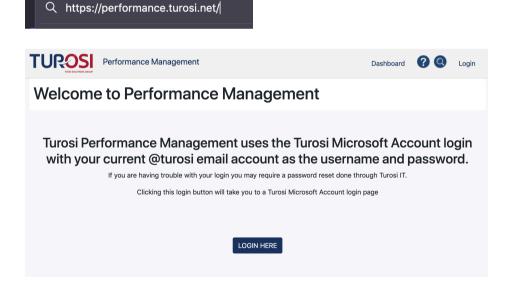
The following guide is designed to help with the implementation and use of the Performance Appraisal System at performance.turosi.net. This document outlines the process for entering rating competencies, collecting performance information objectives for Employee Performance Plans, and recording development and training for Employees Performance Reviews.

PART 1: How do I access the Performance Appraisal System for the first time?

Login

Access to the Performance Appraisal System requires a Turosi Microsoft Account. This login is an employee's Turosi email and Microsoft password.

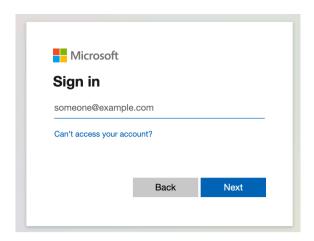
Website: performance.turosi.net (put this in your internet browser)



Accessing the Performance website will display the above screen with the button 'LOGIN HERE'. Clicking this button takes the user to a Microsoft login page.

Microsoft Login:





If an employee has trouble logging in, they may require a password reset which can be done through Turosi IT.



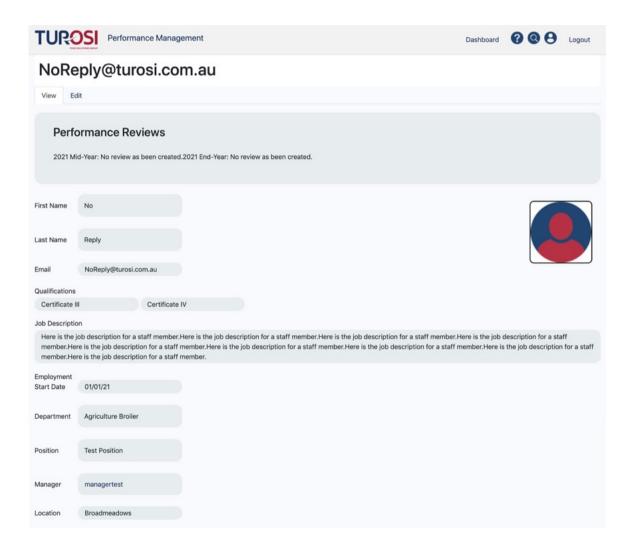
Part 2: How do I set up my Performance Appraisal at the beginning of the Year?

Visit Your User Profile

Once logged in, employees will be able to view their User Profile by clicking on the user icon in the top right hand corner.



This will display the individual's User Profile. The User Profile contains the user's details including name, qualifications, department and manager – see example below.





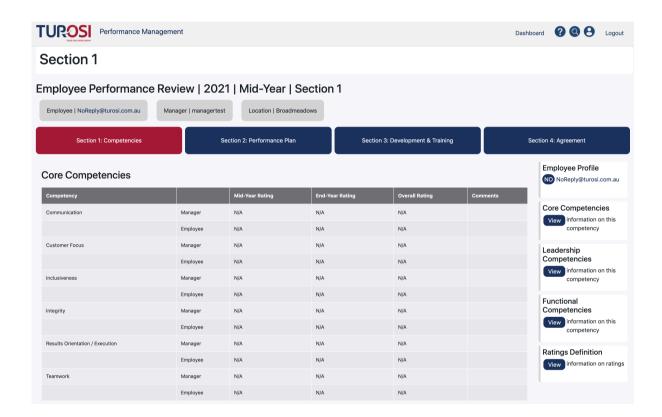
Performance Review Access

The Performance Reviews block is located at the top of the User Profile page. This block displays reviews that have been started and reviews that have been completed.

The Performance Review page lists the employee's name, location and manager's name.

There are four tabs that link to the different sections of the Performance Review:

- 1: Competencies
- 2: Performance Plan
- 3: Development & Training
- 4: Agreement



Performance Review Setup

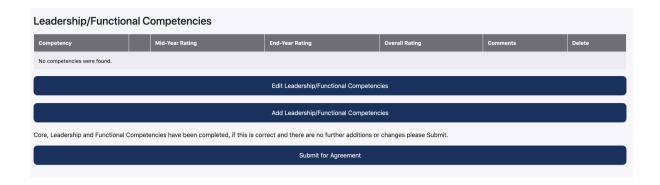
Section 1: Competencies

Competencies are separated into two parts:

- Core Competencies are already automatically setup and can't be changed
- Leadership & Functional Competencies requires the Employee to add the required competencies for their role. These will then be reviewed by the Employee's Manager and finalised

Below the Core Competencies is the Leadership/Functional Competencies. The example below shows there are no competencies in this table. An Employee manually enters the relevant Leadership/Functional Competencies for their role.





Leadership and Functional Competencies are entered by clicking on the 'Add Leadership and Functional Competencies' button.

Add Leadership/Functional Competencies

The Leadership and Functional Competencies will then be reviewed by the Employee's Manager where they will be agreed and finalised for the Employee's role.

To save the selected competencies, click the 'Add Competencies' button.



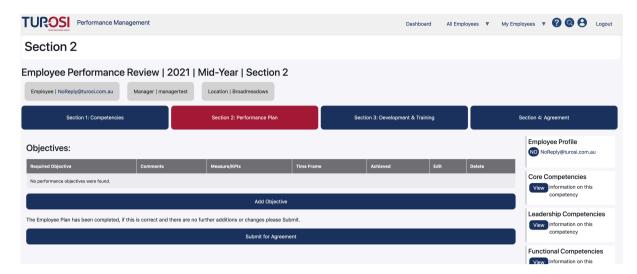
Section 2: Performance Plan

The Employee's Performance Plan needs to be completed by the Employee. The Manager and the Employee will then review and agree the plan for the upcoming year.

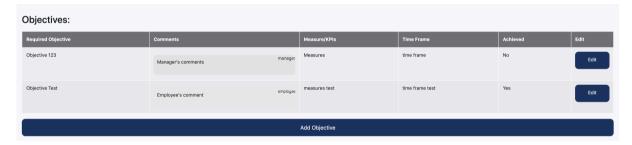
The 'Add Objective' button creates an objective for the Performance Plan with the following fields:

- Required objective
- Measures
- Time frame
- Achieved
- Action plan
- Manager's comments
- Employee's comments





Objectives will be displayed in a table, as shown in the image below:



Objectives can be changed by clicking the 'Edit' button.

The Employee is able to add and edit objectives however only the Manager can delete an objective.

Section 3: Development & Training

The Employee's Development & Training plan is completed by the Employee. The Manager and the Employee will then review and agree the plan for the upcoming year.

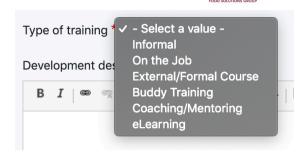
The 'Add Objective' button creates an objective for the Performance Plan with the following fields:

- Required objective
- Type of Training
- Development description
- Time frame
- Achieved



Type of Training is a dropdown menu and includes the values:

- Informal
- On the Job
- External/Formal Course
- Buddy Training
- Coaching/Mentoring
- eLearning



The objectives will be displayed in a table.

Objectives can be changed by clicking the 'Edit' button.

The 'Delete' button will remove the objective from the Performance Plan.

The Employee and Manager are able to add, edit and delete objectives.

Part 3: How do I complete my Mid-Year Review?

Performance Review

The example below shows that the Employee or Manager can create a review.





Section 1: Competency Ratings

As the Employee you need to enter a rating for both the Core competencies and Leadership/Functional competencies. You can also include comments. The ratings display the number value given and the colour that corresponds to that value.

To enter competency ratings:

• The Employee clicks the button labelled 'Edit Core Competencies'.



• Once clicked, the following screen will appear:



Each competency is listed, followed by a rating slider and comment field. The slider can be moved from 1-6 to show the assigned rating for each competency.

Enter your rating for each competency and any comments. Each Core Competency will be listed, showing your rating and comment. There is also an opportunity for your Manager to rate and comment on each Core competency. The Manager's rating and comments cannot be modified by the Employee.

Employees can complete all competencies and ratings at once or save their progress and make changes and edits at a later date.

Changes are saved by clicking on the **Save** button, located at the end of the page.





Section 1 (cont): Leadership & Functional Competencies

As the Employee you need to enter a rating for both the Leadership/Functional competencies. You can also include comments. The ratings display the number value given and the colour that corresponds to that value.

To enter competency ratings:

The Employee clicks the button labelled 'Edit Leadership/Functional Competencies'.



• Once clicked, the following screen will appear:



Enter your rating for each competency and any comments. Each competency will be listed, showing your rating and comment. There is also an opportunity for your Manager to rate and comment on each competency. The Manager's rating and comments cannot be modified by the Employee.

Users can complete all competencies and ratings at once or save their progress and make changes and edits at a later date.

Changes are saved by clicking on the 'Save' button, located at the end of the page.



Section 2: Performance Plan



The Employee should review his/her perception of progress on each objective set at the beginning of the year. Specifically the Employee and Manager should:

- Share your perception of progress
- Discuss similarities and differences in perception
- Provide recognition for on or above target performance results
- If any performance results are below target, develop specific steps for improving performance.

The Employee and Manager should determine if any objectives should be modified:

- Discuss any potential changes
- Agree on the changes
- Document any changes

Where objectives need to be altered, they can be changed by clicking the 'Edit' button.

The Employee is able to add and edit objectives however only the Manager can delete an objective.

When Section 2 is complete, the Employee clicks the 'Submit for Agreement' button, located at the end of the page.

Submit for Agreement

Section 3: Development & Training

The Employee should review his/her Development and Training plan to ensure that it is on track to be completed.

Where Development or Training needs to be altered, they can be changed by clicking the **'Edit'** button.

When Section 3 is complete, the Employee clicks the **'Submit for Agreement'** button, located at the end of the page.

Submit for Agreement

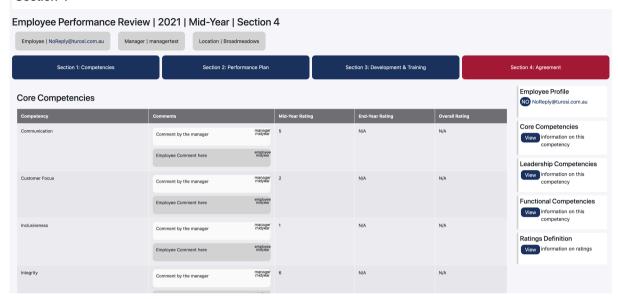


Section 4: Agreement

Agreement is the final section of the Performance Review. It can only be completed once Sections 1 to 3 have been submitted for agreement.

The Employee's Competencies will be displayed in a table, as shown in the image below:

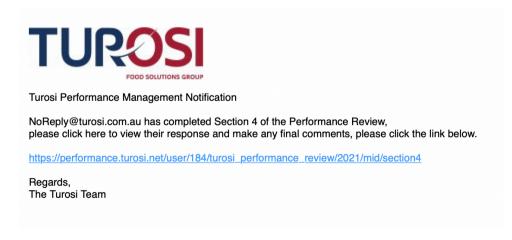
Section 4



Below the table is the Mid-Year overall rating and comment field.



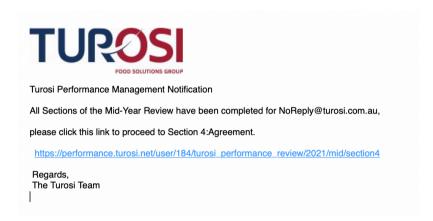
When the rating and comment have been entered by the Employee, the 'Save' button is clicked to complete the review. An email is sent to notify the Manager, as shown in the image below:



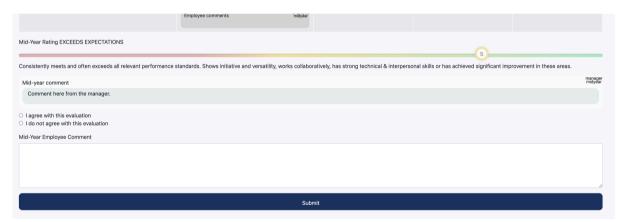


By clicking on the link in the email, the Manager can then review the Employee's Mid-Year overall rating and comments and can then make a final comment.

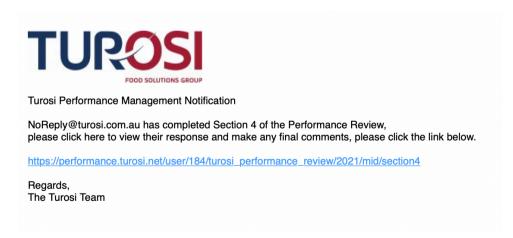
When the rating and comment have been entered by the Manager, the 'Save' button is clicked to complete the review. An email is sent to notify the Employee, as shown in the image below:



The email will contain a link that takes the Employee to Section 4: Agreement. The Employee has the option to 'Agree' or 'Disagree' with the Performance Review. There is an optional field for the Employee to enter a comment.

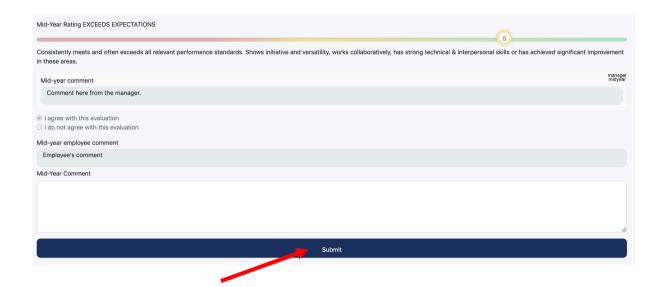


Once completed, the Employee clicks the **'Save'** button. An email is sent to notify the Manager, as shown in the image below:





The Manager then clicks 'Submit' finalises the Performance Review, and it is now considered complete.



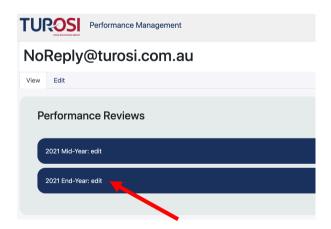
Part 4 – How do I complete my End-Year Review?

Visit Your User Profile

Once logged in, employees will be able to view their User Profile by clicking on the user icon in the top right hand corner.



The Performance Review Block will list the reviews to be viewed or edited. In the example below, the End-Year are now available to view by clicking in the relevant **edit** link.

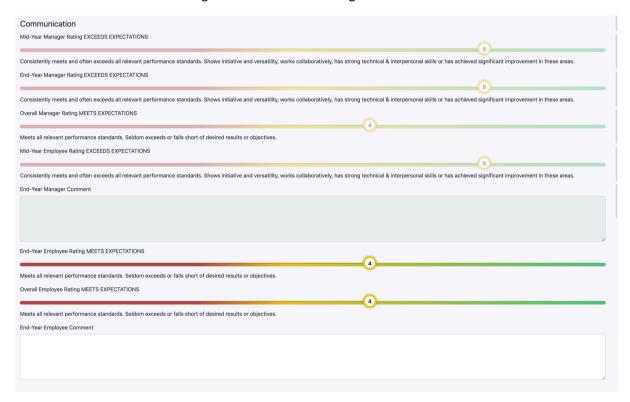




Section 1: Competencies

The Employee can now complete the End-Year Review in the same way as the Mid-Year Review. Clicking the 'Edit Core Competencies' button will now display the ratings and comments for Mid-Year from both Manager and Employee.

There is also has the extra rating slider for 'Overall Rating'.



Changes are saved by clicking on the **Save** button, located at the end of the page.



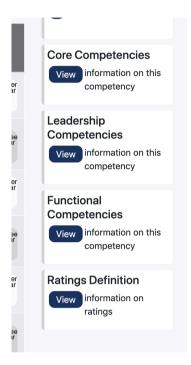
Section 2, 3 and 4

These sections will be completed in the same way as the Mid-Year Review (see Part 3 for details).



Additional Features

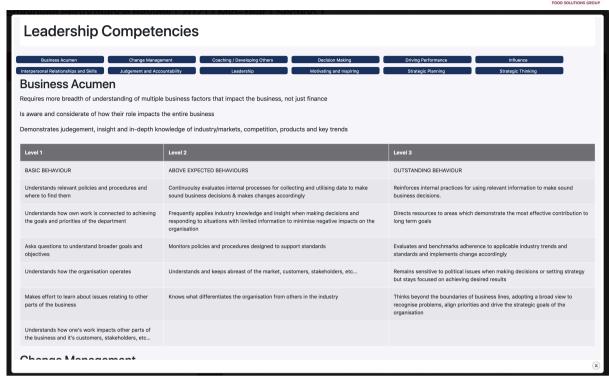
Detailed information about the Competencies and Rating Definitions can be viewed by clicking on the relevant **'View'** button in the menu on the right side of the screen.



Additional Features - Competencies

When the 'View' button for Competencies is clicked, a popup window appears, showing the corresponding Competency information.





The popup window is closed by clicking on the 'x' in the right bottom corner of the popup.



Additional Features – Ratings Definitions

When the 'View' button for Ratings Definitions is clicked, a popup window appears, showing the information.





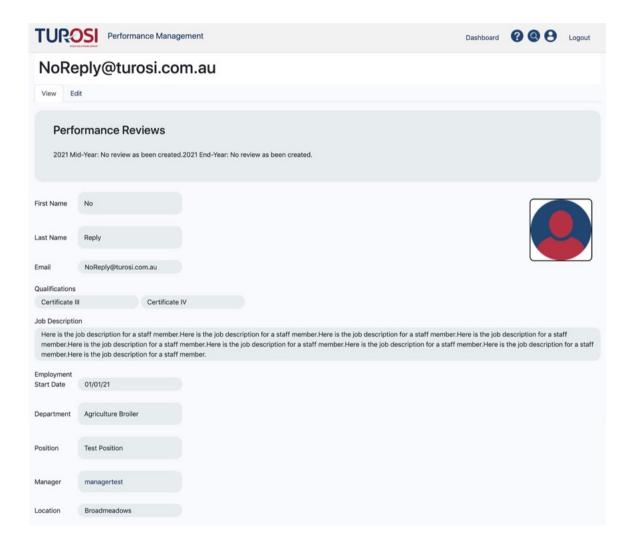
User Profile

Viewing a User Profile

Once logged in, employees will be able to view their User Profile by clicking on the user icon in the top right hand corner.



This will display the individual's User Profile. The User Profile contains the user's details including name, qualifications, department and manager – see example below.





Editing a User Profile

An employee can edit their profile by clicking on the **Edit** tab located above the first name field.



Changes are saved by clicking on the **Save** button, located at the end of the page.

