Sage 300 People

Technical Bulletin: Performance Reviews

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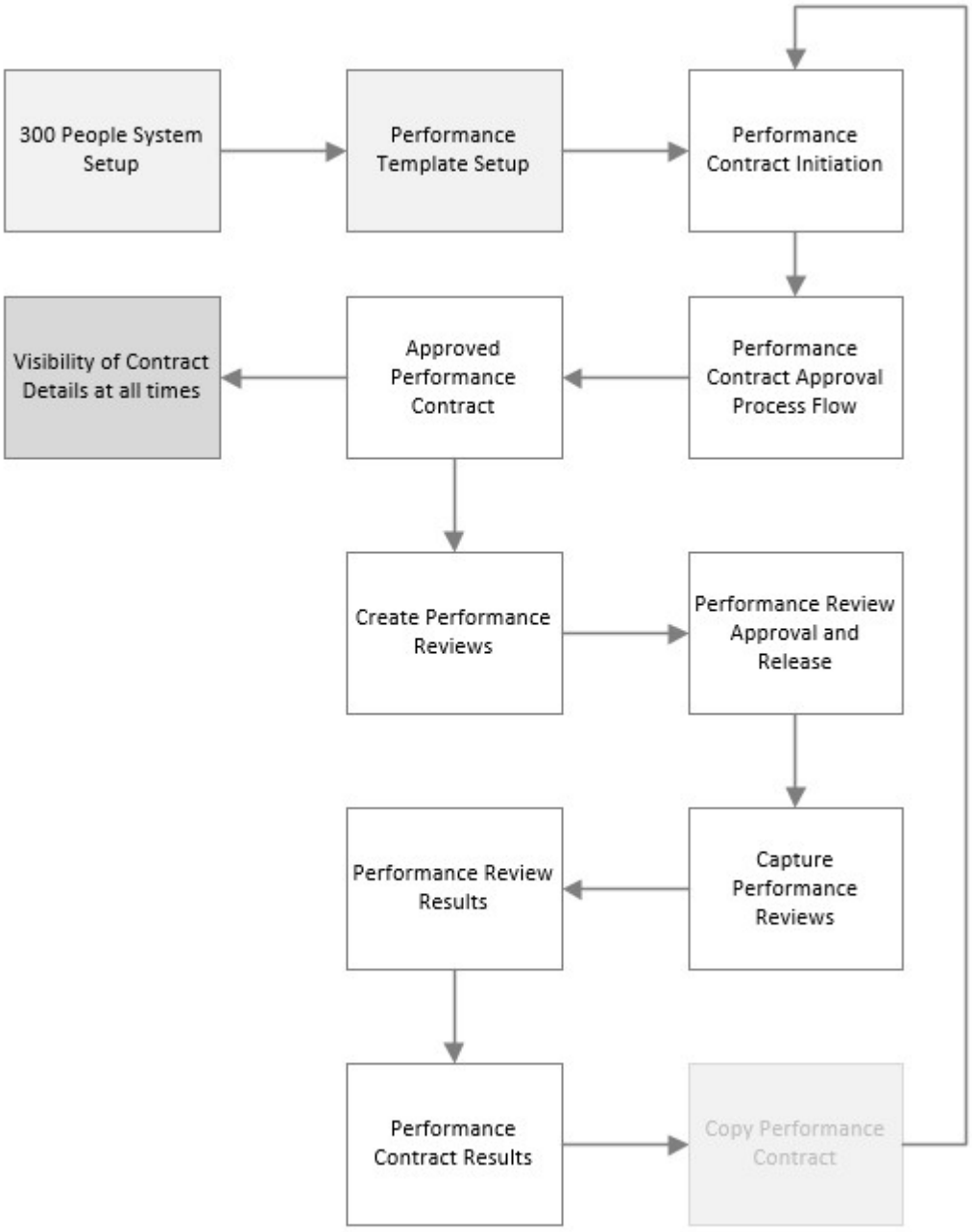
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1.0 Performance Management

1.1 300 People Performance Management Process



2.0 Performance Contracts

All Performance Reviews must be linked to a Performance Contract, an approved Performance Contract is required before any reviews can be released to the employee.

Refer to the Technical Bulletin for Release 18.3.3.0 for detailed information on the Performance Contract Process.

Performance Contract Setup Overview:

- Create the fields required on your Performance Contracts Layout
- Create the Setups for each of the different sections of the Performance Contract:
    - Competency Setup
    - Performance Setup
    - Value Setup
    - Free Text Setup
- Create the required Rating Scales to be used in the Performance Reviews
- Create the Process Definitions to be used for the approval process of the Performance Contracts
- Create the Performance Templates
    - Contract Setup
    - Available criteria
    - Setup Mandatory Reviews
    - Setup Probation Reviews
    - Contract Criteria
    - Documents and Policies
    - Notifications
- Initiate and release the Performance Contracts
- Initiator complete the Performance Contract criteria
- Approval Process Flow is followed
- Approved Performance Contract
- Contract Screen for view and edit on the Performance Contract

3.0 Creating Performance Reviews

Performance reviews can be created from multiple areas:

- Mandatory Reviews
- Probation Reviews
- Adhoc Reviews on ESS
- Adhoc Reviews on People Online
- Bulk Adhoc Reviews on People Online

3.1 Mandatory Reviews

During the Performance Template setup and the Contract Initiation process, mandatory reviews can be created to be released on a specific date.

Multiple mandatory reviews can be setup per contract. Once the date for the specific mandatory review is reached the system will automatically create the reviews for the employees and send to the Contract Owners Unapproved Reviews section on Self Service to approve/edit and release to the employees.

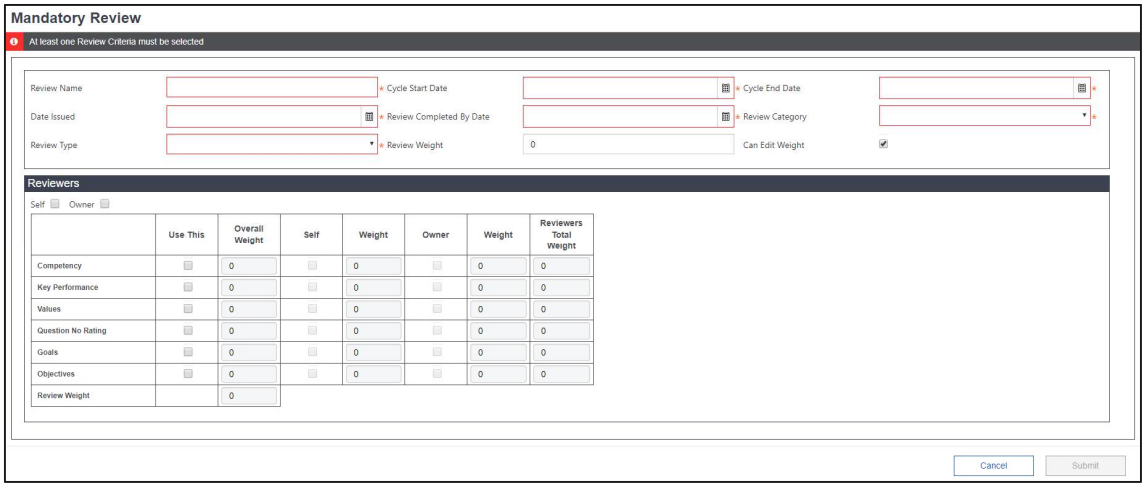
Notification will be sent to the Contract Owner that the review is ready for approval and release.

The following fields are captured on the mandatory review.

Field Name	Field Type	Description
Review Name	Input field	User defined name for the mandatory review.
Cycle Start Date	DD/MM	Indicate the review's cycle start date, cycle start date cannot be before the Template Cycle start date, validations will become active during the contract create step when the year is added.
Cycle End Date	DD/MM	Indicate the review's cycle end date, the cycle end date cannot be before the cycle start date and cannot be before or after the template start and end date, validations will become active during the contract create step when the year is added.
Date Issued	DD/MM	Indicate the day and month that the mandatory review must be released to the Contract Owner's Inbox. The Issue date cannot be before the cycle start

Field Name	Field Type	Description
		date. Validations will become active during the contract create step when the year is added.
Review Completed By Date	DD/MM	Indicate the day and month by when the review must be completed. This date will be used for notifications. Completed date cannot be before cycle start date or date issued. Validations will become active during the contract create step when the year is added.
Review Category	Selection	Select the Review Category, this field is setup in the system under Parameters.
Review Type	Selection	Select the Review Type, this field is setup in the system under Parameters.
Review Weight	Numeric input	Select the review weight %. Weights can be less than 100% but never more than 100%.
Can Edit Weight	Tick box	Indicate whether the reviews weight can be changed on the contract once all reviews for the year has been completed.
Reviewers - Self	Tick box	Select whether the employee must be a reviewer.
Reviewers - Owner	Tick box	Select whether the Contract Owner must be a reviewer.
Use This	Tick Box	Depending on the selections made on the Available Criteria tab the Criteria options will show to indicate which items must be reviewed during this mandatory review: • Competency • Performance • Values • Free Text 1(custom name) • Free Text 2(custom name) • Free Text 3(custom name) • Free Text 4(custom name)
Overall Weight	Numeric input	Indicate the weight % for each of the Criteria options selected to be reviewed. The weight for all selected Criteria must add to 100%. Criteria weight can be 0% but overall weight must be equal to 100%.
Self	Tick Box	Indicate which Criteria items the employee must review on, this will be used in the review calculations.

Field Name	Field Type	Description
Weight	Numeric input	Indicate the employees' weight for each criteria item.
Owner	Tick Box	Indicate which Criteria items the Contract Owner must review on, this will be used in the review calculations
Weight	Numeric input	Indicate the Contract Owners weight for each criteria item, this will be used in the review calculations
Reviewers Total Weight		All reviewers weight must add up to 100% per Criteria item.



3.2 Probation Reviews

During the Performance Template setup and the Contract Initiation process probation reviews can be created to be released at a specific number of days prior to the employees Probation End Date on the Employee Detail screen.

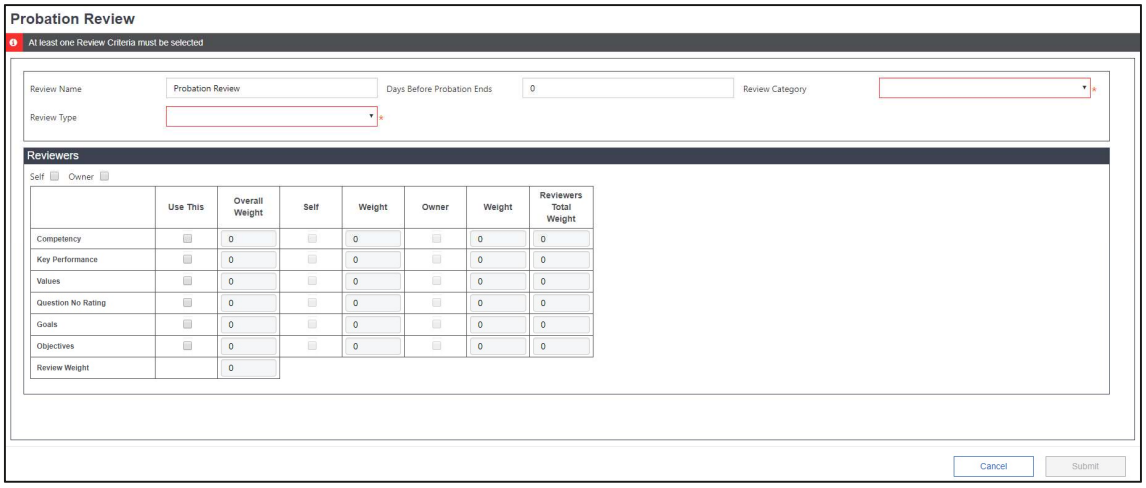
Multiple probation reviews can be set up on a Contract. Once the date for the specific Probation review is reached the system will automatically create the review for the employee and send it to the Contract Owners Unapproved Reviews section on Self Service to approve/edit and release to the employee.

Notification will be sent to the Contract Owner that the review is ready for approval and release.

The following fields are captured on the Probation Review

Field Name	Field Type	Description
Review Name	Input field	User defined name for the Probation Review – system default to Probation Review
Days Before Probation Ends	Numeric Input	Indicate how many actual days before the Probation End Date (on Employee Detail Screen) must the Probation review be created for the Contract Owner to approve.
Review Category	Selection	Select the Review Category, this field is setup in the system under Parameters.
Review Type	Selection	Select the Review Type, this field is setup in the system under Parameters.
Reviewers - Self	Tick box	Select whether the employee must be a reviewer.
Reviewers - Owner	Tick box	Select whether the Contract Owner must be a reviewer.
Use This	Tick Box	Depending on the selections made on the Available Criteria tab the Criteria options will show to indicate which items must be reviewed during this mandatory review: • Competency • Performance • Values • Free Text 1(custom name) • Free Text 2(custom name) • Free Text 3(custom name) • Free Text 4(custom name)
Overall Weight	Numeric input	Indicate the weight % for each of the Criteria options selected to be reviewed. The weight for all selected Criteria must add up to 100%. Criteria weight can be 0% but overall weight must be equal to 100%.
Self	Tick Box	Indicate which Criteria items the employee must review on.
Weight	Numeric input	Indicate the employees' weight for each criteria item.
Owner	Tick Box	Indicate which Criteria items the Contract Owner must review on, this will be used in the review calculations.
Weight	Numeric input	Indicate the Contract Owners weight for each criteria item, this will be used in the review calculations.

Field Name	Field Type	Description
Reviewers Total Weight		All reviewers weight must add up to 100% per criteria item.



3.3 Adhoc Review on Self Service

Adhoc reviews can be created on any approved contract, reviews cannot be created if the contract has not been approved by all approvers in the process flow. Adhoc reviews can be created by the Contract Owner for an employee or an employee can create his own review and select the required reviewers. All Adhoc reviews require the Contract Owners' approval on the Unapproved Review screen before being released to the reviewers.

To access the Adhoc reviews On Self Service:

Expand **Performance**
Click **Contracts**

On the Contract screen a list of contracts will be displayed, if the user is a Contract Owner on employees' Performance Contracts all these contracts will be displayed along with his own Performance Contract. The Performance Contract status is displayed in the Contract Status column.

Action Buttons available:

Icon	Description	Function
	View	View the selected contract. View button will only be available if: • One contract is selected

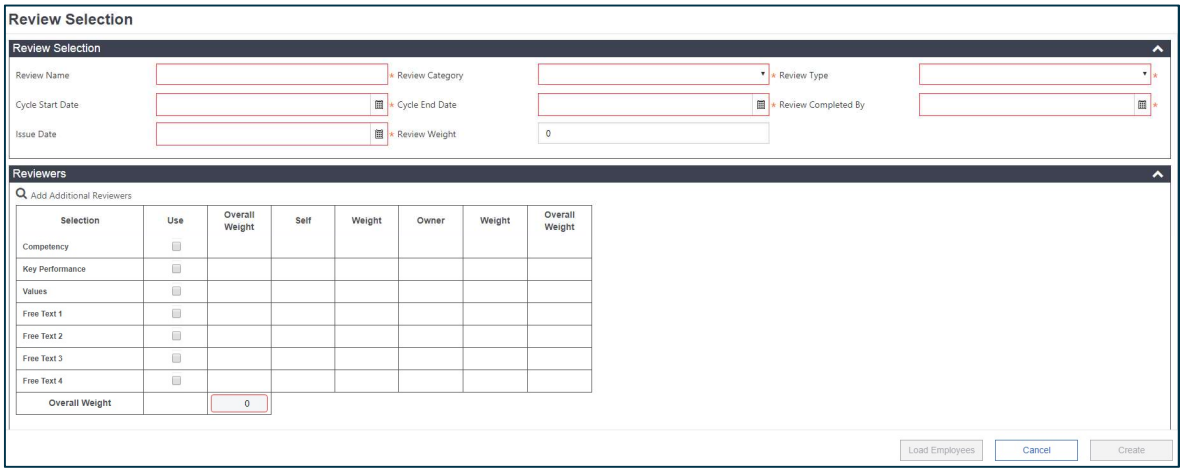
Icon	Description	Function
	Edit	Edit the selected contract. If the contract is edited the process flow will start again and the contract status will change to Initiated. Edit button will only be available if: • One contract is selected • Contract Type = Subordinate
	**Create Review**	Create Adhoc reviews on the specific Contract. Create Review will be available: • For approved contracts • Multiple contracts can be selected
	Close	Close an active contract, multiple contracts can be closed together. Reviews created on the contract will also be closed. Closed button will only be available if the selected contract/s status is: • Initiated • In Process • Approved
	Open	Open a closed contract, reviews will not be opened again when the contract is opened. Open button will only be available if the selected contract status is: • Closed
	Archive	Archive old or unused contracts. Archived button will be available if the selected contract status is: • Closed
	Refresh	Refresh the grid layout data.
	Print	Print the Contract Report for the selected contract.
	Export	Export the grid layout to excel.
	Column Chooser	Allow the user to include or exclude columns in the grid by dragging them into and out of the column chooser. The columns can also be moved around on the grid to allow the user to customise the layout for exports.

3.3.1 Create Review

The Review Selection screen will open when the Create Review action button is selected:

Field Name	Field Type	Description
Review Name	Input field	User defined name for the review.
Review Category	Selection	Select the Review Category, this field is setup in the system under Parameters.
Review Type	Selection	Select the Review Type, this field is setup in the system under Parameters.
Cycle Start Date	DD/MM	Indicate the review's cycle start date, the cycle start date cannot be before the contract cycle start date.
Cycle End Date	DD/MM	Indicate the review's cycle end date. The cycle end date cannot be before cycle start date and cannot be before or after the contract start and end date.
Review Completed By	DD/MM	Indicate the day and month by when the review must be completed. This date will be used for notifications. The completed date cannot be before the cycle start date or date issued.
Issued Date	DD/MM	Indicate the day and month the review must be released to the Contract Owner's Inbox. The Issue date cannot be before the cycle start date.
Review Weight	Numeric input	Select the review weight %. Weights can be less than 100% but never more than 100%.
Add Additional Reviewers	Search	The Standard Employee Search screen will open, select the additional reviewers to be included in the review. Unlimited number of additional reviewers can be added.
Use	Tick Box	All criteria will be displayed to select which criteria must be included in the review. The review can only include items available on the approved contract. Validations will be displayed with any errors after the employees have been loaded. • Competency • Performance • Values • Free Text 1 • Free Text 2

Field Name	Field Type	Description
		• Free Text 3 • Free Text 4
Overall Weight	Numeric input	Indicate the weight % for each of the criteria options selected to be reviewed. The weight for all selected criteria must add up to 100%. Criteria weight can be 0% but overall weight must be equal to 100%.
Self	Tick Box	Indicate which criteria items the employee must review.
Weight	Numeric input	Indicate the employees' weight for each criteria item selected to review, the weight will influence the review total. Weight can be 0%, however Overall Weight for all reviewers must equal 100%.
Owner	Tick Box	Indicate which criteria items the Contract Owner must review.
Weight	Numeric input	Indicate the employee's weight for each criteria item selected to review, the weight will influence the review total. Weight can be 0%, however Overall Weight for all reviewers must equal 100%.
Additional Reviewers		All additional reviewers will be displayed in separate columns with a column for their weight selection.
Overall Weight		All reviewers weight must add up to 100% per criteria item.



3.3.2 Load Employees

At the bottom of the Review Selection screen the following action buttons are available:

Field Name	Description
Load Employee	Select to load the employees. All employees whose contracts were selected on the Contract screen will be loaded. Review validations will be done on the criteria selected on the review against the criteria available on each contract.
Cancel	Select to cancel the review. All selections will be lost.
Create	Once the review detail per employee has been checked and confirmed the reviews can be created. Create will release the reviews to the Contract Owner on the Date Issued date.

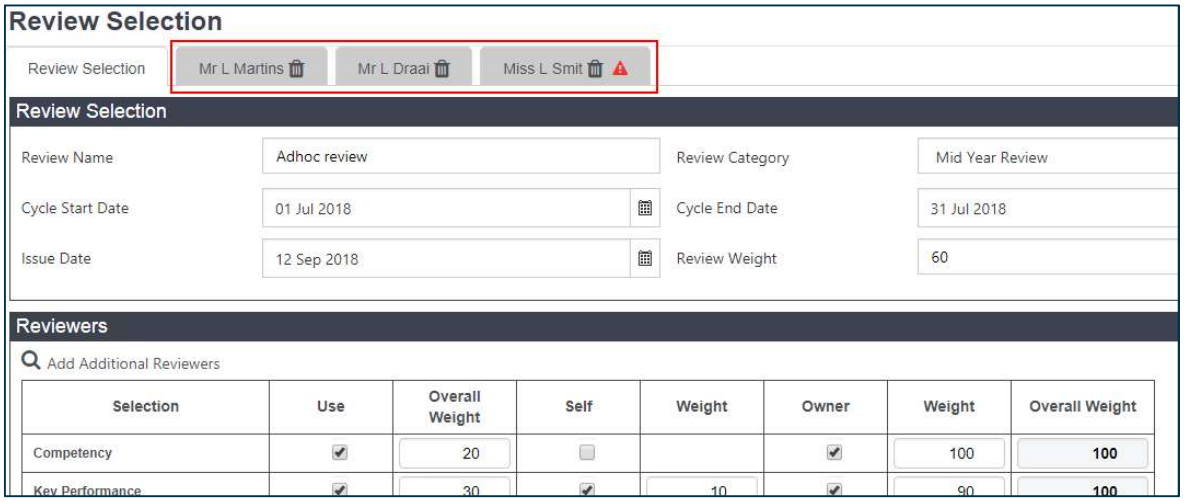


3.3.3 Confirm Review Details

Once the Load Employees selection was made additional tabs will appear at the top of the screen with all Employees selected on the Contract screen.

Icon	Description	Function
Employee Name	Employee Name	Indicate the specific employee for whom a review will be created.
	Delete	Delete a review from the process, the review will not be created, and all data will be deleted.
	Error	Error/s exist on the review and need to be corrected or acknowledged before the review can be created.

Select each employee to confirm that all review criteria are correct or to make any individual changes to the reviews.



The following review details will be displayed for each employee:

Field Name	Description
Review Selection	Indicate all review header selections. All fields can be edited.
Reviewers	Indicate all selected areas, reviewers and weights. All fields are editable and additional reviewers can be added or removed for this specific employee's review. It is important to confirm that the correct Free Text Criteria item is included in the review with the correct weight's allocations.
Reviewer Detail	Indicate the review criteria as per the approved contract which will form part of this review. Review detail cannot be edited as this was approved by all stakeholders during the Performance Contracting phase. Should review detail need to be changed the contract must be edited and approved again by all stakeholders.

3.3.4 Review Errors

All review errors will be displayed at the top of the screen and needs to be acknowledged for the error to be removed.

Multiple errors could occur, all errors must be acknowledged individually. Once all error messages were addressed the error icon will be removed and the Create button will become available.



Once all review errors have been corrected and all review details confirmed the Create action button can be selected to create the reviews.

All reviews will be released to the Contract Owners Self Service Inbox under the Unapproved Reviews section to be confirmed and released.

3.4 Adhoc Review on People Online

Adhoc reviews can be created on People Online by HR for any approved contract Reviews cannot be created if the contract has not been approved by all approvers in the process flow. All Adhoc reviews created from the Approved Contract requires the Contract Owners approval on the Unapproved Review screen before being released to the reviewers.

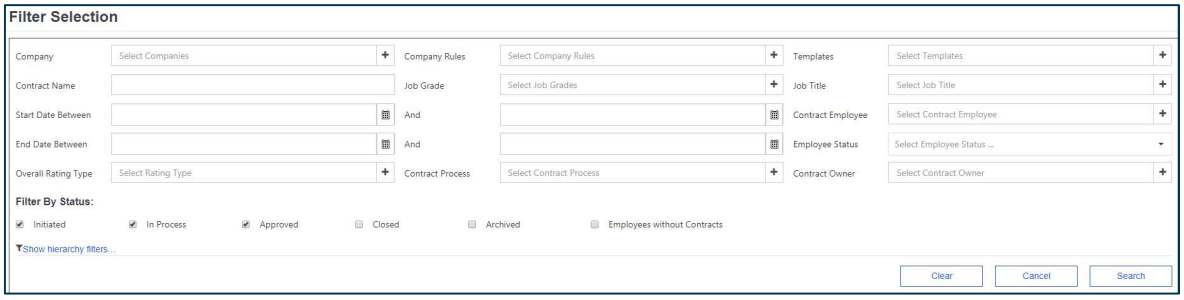
To access the Adhoc reviews on People Online:

Expand	**Performance**
Click	**Contracts**

Due to the potential number of contracts available, a filter screen will open to filter for the specific contracts required, it is always advised to use filters:

Field Name	Description
Company	Select to filter for employee contracts linked to specific companies.
Company Rules	Select to filter for employee contracts linked to specific company rules.
Templates	Select to filter for contracts linked to specific Performance Templates.
Contract Name	Select to filter for specific Contract Names.
Job Grade	Select to filter for employee contracts linked to specific Job Grades.
Job Title	Select to filter for employee contracts linked to specific Job Titles.
Start Date Between	Select to filter for employee contracts with a cycle start date from a specific date.
And	Select to filter for employee contracts with a cycle start date until a specific date.
Contract Employee	Select to filter for specific employees. Employee search screen will open.
End Date Between	Select to filter for employee contracts with a cycle end date from a specific date.
And	Select to filter for employee contracts with a cycle end date until a specific date.

Field Name	Description
Employee Status	Select to filter according to the employee status: • New • Active • Terminated • Re-instate New • Future • Archived
Overall Rating Type	Select to filter according to a specific rating type linked to the contracts.
Contract Process	Select to filter according to a specific contract process linked to the contracts.
Contract Owner	Select to filter according to a specific Contract Owner linked to the contracts.
Filter Status	• Initiated – selected by default • In Process – selected by default • Approved – selected by default • Closed • Archived • Employees without Contracts – allow the user to use the above filters to filter for specific employees without contracts.
Hierarchy	Select to filter for employee contracts linked to specific hierarchies.



Once the filters have been applied the search button can be selected to view the selected contracts.

On the Contract screen a list of contracts will be displayed, the Performance Contract status is displayed in the Contract Status column.

Action buttons available:

Icon	Description	Function
	View	View the selected contract. View button will only be available if: • One contract is selected

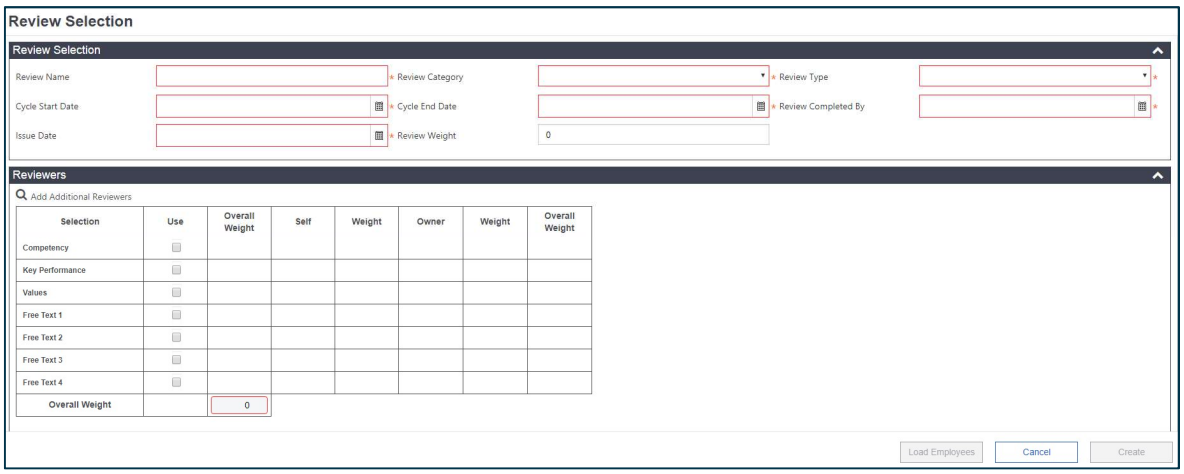
Icon	Description	Function
	Edit	Edit the selected contract. If the contract is edited the process flow will start again and the contract status will change to Initiated. Edit button will only be available if: • One contract is selected
	**Create Review**	Create adhoc reviews on the specific contract. Create review will be available: • For approved contracts • Multiple contracts can be selected
	Close	Close an active contract, multiple contracts can be closed together. Reviews created on the contract will also be closed. Closed button will only be available if the selected contract/s status is: • Initiated • In Process • Approved
	Open	Open a closed contract, reviews will not be opened again when the contract is opened. Open button will only be available if the selected contract status is: • Closed
	Archive	Archive old or unused contracts. Archived button will be available if the selected contract status is: • Closed
	Refresh	Refresh the grid layout data.
	Print	Print the Contract report for the selected contract.
	Export	Export the grid layout to excel.
	Column Chooser	Allow the user to include or exclude columns in the grid by dragging them into and out of the column chooser. The columns can also be moved around on the grid to allow the user to customise the layout for exports.

3.4.1 Create Review

The Review Selection screen will open when the Create Review action button is selected:

Field Name	Field Type	Description
Review Name	Input field	User defined name for the review.
Review Category	Selection	Select the Review Category, this field is setup in the system under Parameters.
Review Type	Selection	Select the Review Type, this field is setup in the system under Parameters.
Cycle Start Date	DD/MM	Indicate the review cycle start date. The cycle start date cannot be before the contract's cycle start date.
Cycle End Date	DD/MM	Indicate the review's cycle end date. The cycle end date cannot be before cycle start date and cannot be before or after the contract start and end date.
Review Completed By	DD/MM	Indicate the day and month by when the review must be completed, this date will be used for notifications. Completed date cannot be before cycle start date or date issued.
Issued Date	DD/MM	Indicate the day and month the review must be released to the Contract Owner's Inbox. The Issue date cannot be before the cycle start date.
Review Weight	Numeric input	Select the review weight %. Weights can be less than 100% but never more than 100%.
Add Additional Reviewers	Search	The Standard Employee Search screen will open. Select the additional reviewers to be included in the review. Unlimited number of additional reviewers can be added.
Use	Tick Box	All criteria will be displayed to select which criteria must be included in the review. The review can only include items available on the approved contract, validations will be displayed with any errors after the employees has been loaded: • Competency • Performance • Values • Free Text 1 • Free Text 2

Field Name	Field Type	Description
		• Free Text 3 • Free Text 4
Overall Weight	Numeric input	Indicate the weight % for each of the criteria options selected to be reviewed. The weight for all selected criteria must add up to 100%. Criteria weight can be 0% but overall weight must be equal to 100%.
Self	Tick Box	Indicate which criteria items the employee must review.
Weight	Numeric input	Indicate the employees' weight for each criteria item selected to review, the weight will influence the review total. Weight can be 0%, however Overall Weight for all reviewers must add up to 100%
Owner	Tick Box	Indicate which criteria items the Contract Owner must review.
Weight	Numeric input	Indicate the employees' weight for each criteria item selected to review, the weight will influence the review total. Weight can be 0%, however Overall Weight for all reviewers must equal 100%
Additional Reviewers		All additional reviewers will be displayed in separate columns with a column for their Weight selection.
Overall Weight		All reviewers weight must be equal to 100% per criteria item.



3.4.2 Load Employees

At the bottom of the Review Selection screen the following action buttons are available:

Field Name	Description
Load Employee	Select to load the employees. All employees whose contracts was selected on the Contract screen will be loaded. Review validations will be done on the criteria selected on the review against the criteria available on each contract.
Cancel	Select to cancel the review. All selections will be lost.
Create	Once the review detail per employee has been checked and confirmed the reviews can be created. Create will release the reviews to the Contract Owner on the Date Issued date.

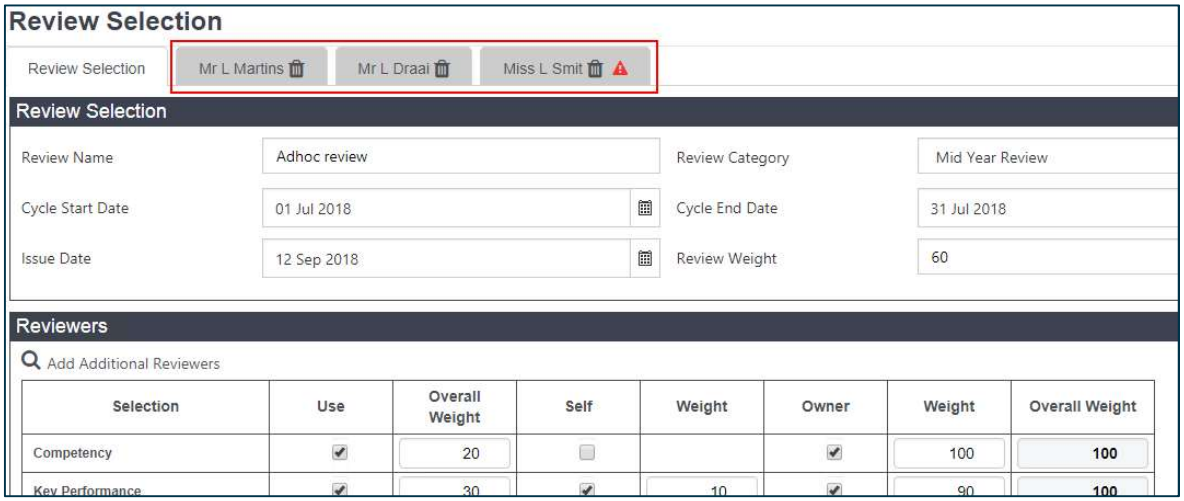


3.4.3 Confirm Review Details

Once the Load Employees selection was made additional tabs will appear at the top of the screen with all employees selected on the Contract screen.

Icon	Description	Function
Employee Name	Employee Name	Indicate the specific employee for whom a review will be created.
	Delete	Delete a review from the process, the review will not be created, and all data will be deleted.
	Error	Error/s exist on the review and need to be corrected or acknowledged before the review can be created.

Select each employee to confirm that all review criteria are correct or to make any individual changes to the reviews.



The following review details will be displayed for each employee:

Field Name	Description
Review Selection	Indicate all review header selections. All fields can be edited.
Reviewers	Indicate all selected areas, reviewers and weights. All fields are editable and additional reviewers can be added or removed for this specific employee's review. It is important to confirm that the correct Free Text Criteria item is included in the review with the correct weights allocations.
Reviewer Detail	Indicate the review criteria as per the approved contract which will form part of this review. Review detail cannot be edited as this was approved by all stakeholders during the Performance Contracting phase. Should review detail need to be changed the contract must be edited and the contract approved again by all stakeholders.

3.4.4 Review Errors

All review errors will be displayed at the top of the screen and needs to be acknowledged for the error to be removed.

Multiple errors could occur, all errors must be acknowledged individually. Once all error messages were addressed the error icon will be removed and the Create option will become available.



Once all reviews errors have been corrected and all review details confirmed the Create action button can be selected to create the reviews.

All reviews will be released to the Contract Owner's Self Service Inbox under the Unapproved Reviews section to be confirmed and released.

3.5 Bulk Adhoc Reviews on People Online

HR can create adhoc reviews for multiple employees in bulk on People Online.

To access the adhoc reviews on People Online:

Expand	**Performance**
Click	**Create Reviews**

The Adhoc Review Instances screen will open with the following action buttons:

Icon	Description	Function
	New	Create a new review instance.
	Edit	Edit the selected review instance. Edit will only be available for status: • Ready
	Cancel	Cancel the selected review instance. Cancel will only be available for status: • New • Ready
	Delete	Delete the selected review instance header: • Delete Header Only – This will only delete the instance line on this screen • Delete Instance with Reviews – This will delete all reviews linked to this instance with a status of New Delete will only be available for status: • Released • Cancelled
	Refresh	Refresh the screen for status updates.
	Export	Export the review list to excel.
	Release	Release the reviews in the specific selected instance to the reviewer's inboxes. Released will only be available for status: • Ready

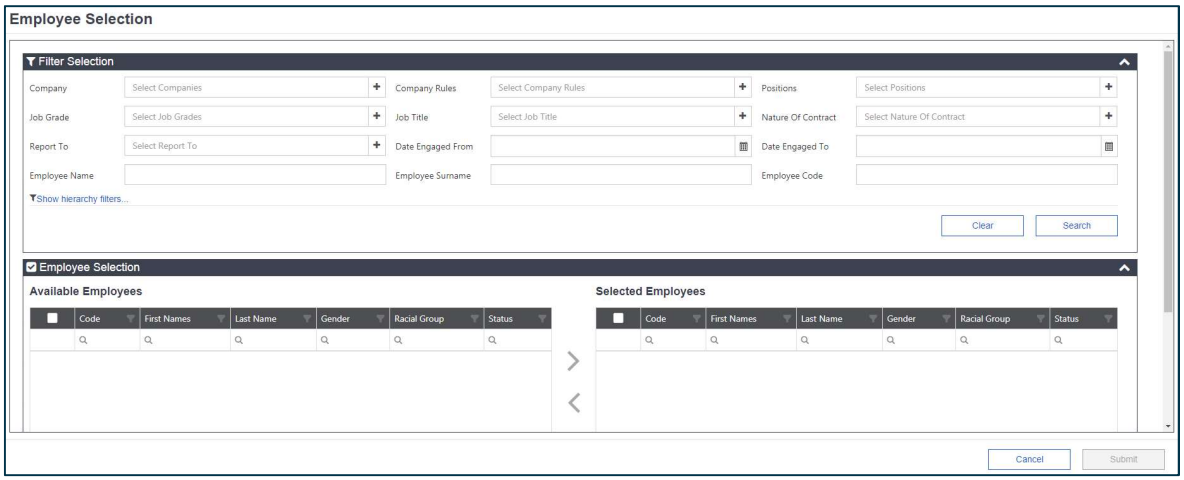
The Adhoc Review Instances screen layout:

Field Name	Description
Review Name	Display the different review instance names.
Cycle Start Date	Display the reviews cycle start date.
Cycle End Date	Display the review cycle end date.
Status	The following statuses are available: • New – after the instance was created the status will be new while the scheduler creates the review • Ready – once the reviews have been created by the scheduler the status will change to ready • Released – after the reviews were released to the reviewer's inboxes the status will change to "Released".
Progress	Indicate the progress of the reviews create by the scheduler, the status will change to "Ready" when the progress is 100%.
Review Count	Indicate the number of reviews selected to be created in the specific instance.
Created	Indicate the number of successful reviews created in the instance. Select the  icon to view the details of the employees for whom reviews was created: Reviews Created for screen: • Employee Code • Employee • Reports To Employee Code • Reports To Display Name • Contract Name The list of employees for whom reviews was created can be exported to excel by selecting the  icon.
Invalid Reviews	Indicate the number of reviews with errors on. Edit the review instance to view and correct all invalid reviews.
Failed	Indicate the number of failed reviews, these reviews have not been created by the scheduler and will not be released to the reviewers' inboxes. Select the  icon to view the details of the employees for whom reviews failed: Reviews Creation Failed for screen: • Employee Code • Employee • Reports To Employee Code

Field Name	Description
	• Reports To Display Name • Reason The list of employees for whom reviews were not created can be exported to excel by selecting the  icon.
Last Changed	Indicate the date the specific Review Instance was last edited.

3.5.1 Create Review

Once the New  icon was selected the Employee Selection screen will appear. It is advised to filter for the employees for whom reviews must be created to avoid loading all employees in the web which could cause speed issues.



Filter Selection:

Field Name	Description
Company	Select to filter for employees linked to specific companies. Security will apply, and you will only be able to view the companies and employees for whom you have access. Multiple companies can be selected.
Company Rules	Select to filter for employees linked to specific company rules. If a company has been selected only the company rules linked to that company will be displayed. Security will apply, and you will only be able to view the companies and employees for whom you have access. Multiple company rules can be selected.
Positions	Select to filter for employees linked to specific positions.

Field Name	Description
Job Grade	Select to filter for employees linked to specific Job Grades.
Job Title	Select to filter for employees linked to specific Job Titles.
Nature of Contract	Select to filter for employees linked to specific Nature of Contract.
Report To	Select to filter for employees linked to specific manager.
Date Engaged From	Select to filter for employees with a date engaged from a specific date.
Date Engaged To	Select to filter for employees with a date engaged until a specific date.
Employee Name	Select to filter for a specific employee on first name.
Employee Surname	Select to filter for a specific employee on surname.
Employee Code	Select to filter for a specific employee on employee code.
Hierarchy	Select to filter for employees linked to specific hierarchies.
Clear	Clear all filter selections, this action will not clear the employees selected at the bottom of the screen.
Search	Select to search for employees as per filters applied. If no filters have been applied all employees for whom the user has access to will be returned.

Employee Selection:

The Employees as per the filter selections will be displayed on the left of the screen under the “Available Employees” section. Additional grid filters are available on both the Available and Selected Employees grids.

Individual or multiple employees can be selected on the left and moved to the right by using the  button in the middle of the 2 sections. The selected employees will be moved to the right side of the screen under the “Selected Employees” section.

Employees selected incorrectly can be moved back to the “Available Employee” section by selecting the employee and using the  button.

The system will not allow the same employee to be added to the “Selected Employee” section multiple times.

Once the correct employees are displayed in the Selected Employees section the Submit button on the bottom right can be selected.

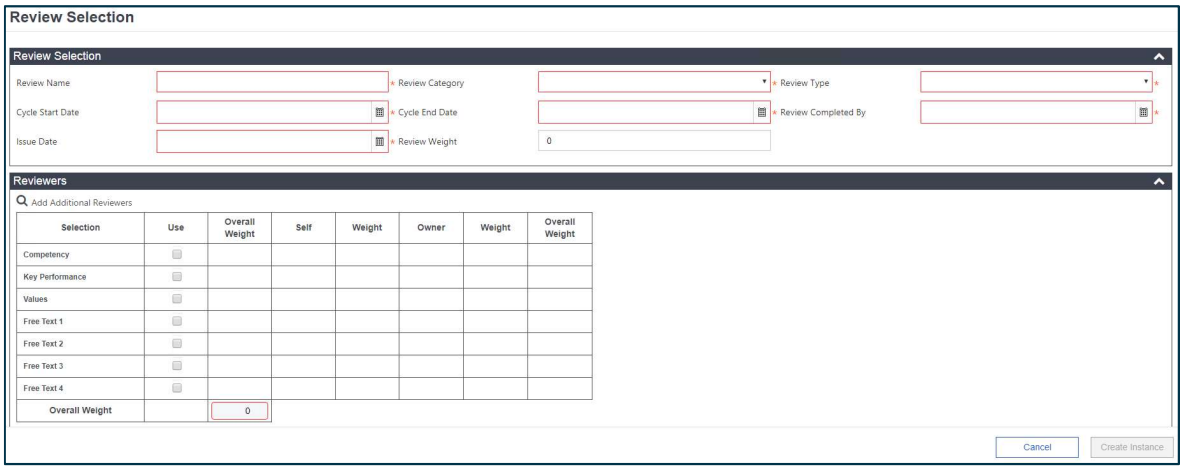
The Submit button will only become available if a minimum of one employee is selected.

Review Selection

The Review Selection screen will open when the Submit action button is selected:

Field Name	Field Type	Description
Review Name	Input field	User defined name for the review.
Review Category	Selection	Select the review category, this field is setup in the system under Parameters.
Review Type	Selection	Select the review type, this field is setup in the system under Parameters.
Cycle Start Date	DD/MM	Indicate the review's cycle start date. The cycle start date cannot be before the Contract cycle start date.
Cycle End Date	DD/MM	Indicate the review cycle end date. The cycle end date cannot be before the cycle start date and cannot be before or after the contract start and end date.
Review Completed By	DD/MM	Indicate the day and month by when the review must be completed, this date will be used for notifications. Completed date cannot be before cycle start date or date issued.
Issued Date	DD/MM	Indicate the day and month the review must be released to the Contract Owner's Inbox. The issue date cannot be before the cycle start date.
Review Weight	Numeric input	Select the review weight %. Weights can be less than 100% but never more than 100%.
Add Additional Reviewers	Search	The Standard Employee Search screen will open, select the additional reviewers to be included in the review. Unlimited number of additional reviewers can be added.
Use	Tick Box	All criteria will be displayed to select which criteria must be included in the review. The review can only include items available on the approved contract. Validations will be displayed with any errors after the employees have been loaded. • Competency • Performance • Values

Field Name	Field Type	Description
		• Free Text 1 • Free Text 2 • Free Text 3 • Free Text 4
Overall Weight	Numeric input	Indicate the weight % for each of the criteria options selected to be reviewed. The weight for all selected criteria must add up to 100%. Criteria weight can be 0% but overall weight must be equal to 100%.
Self	Tick Box	Indicate which criteria items the employee must review.
Weight	Numeric input	Indicate the employees' weight for each criteria item selected to review, the weight will influence the review total. Weight can be 0%, however Overall Weight for all reviewers must equal 100%.
Owner	Tick Box	Indicate which criteria items the Contract Owner must review.
Weight	Numeric input	Indicate the Contract Owners' weight for each criteria item selected to review, the weight will influence the review total. Weight can be 0%, however Overall Weight for all reviewers must be equal to 100%
Additional Reviewers		All additional reviewers will be displayed in separate columns with a column for their Weight selection.
Overall Weight		All reviewers' weight must be equal to 100% per criteria item.



Once all selections have been made the Create Instance option at the bottom will become available. The system will display an information message to confirm and return to the Adhoc Review Instances screen. The new instance will be available on the screen.



3.5.2 Edit Reviews

Once the review instance status has changed to “Ready” it is recommended to view the reviews and make any individual changes as required.

Select the Edit  option in the action bar, the Review Selection screen will open with a list of all the employees selected to create reviews for.

The following action icons are available

Icon	Description	Function
	Edit	Edit the selected employees review, the selected employees review detail will appear on the second tab at the top
	Delete	Delete the selected employees’ review.
	Validation errors	By default, all employees for whom reviews were created will appear, select this icon to only show employees whose reviews have validation errors.
	Refresh	Refresh the review selection screen.

Review Selection Screen Layout

Field Name	Description
Selection Box	Select the review to view/edit.
Employee Code	Employee code of the employee for whom the review was created.

Field Name	Description
First Name	First name of the employee for whom the review was created.
Last Name	Last name of the employee for whom the review was created.
Contract Name	Contract that the review is linked to.
Failed Validation	Indicate the number of validation errors.

Select a review and then the edit option in the action bar or select the second tab with the employee details to open the review.

The following Review Details will be displayed for the review:

Field Name	Description
Review Selection	Indicate all review header selections. All fields can be edited.
Reviewers	Indicate all selected areas, reviewers and weights. All fields are editable and additional reviewers can be added or removed for this specific employee's review. It is important to confirm that the correct Free Text Criteria item is included in the review with the correct weights allocations.
Reviewer Detail	Indicate the Review Criteria as per the Approved Contract which will form part of this Review. Review detail cannot be edited as this was approved by all stakeholders during the Performance Contracting phase. Should review detail need to be changed the contract must be edited and the contract approved again by all stakeholders.

3.5.3 Review Errors

All review errors will be displayed at the top of the screen and needs to be acknowledged for the error to be removed.

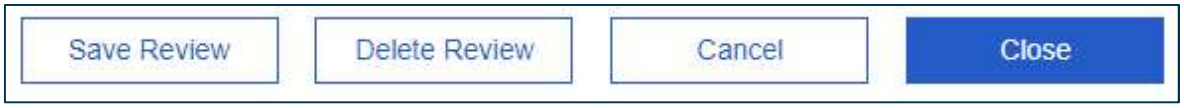
Multiple errors could occur, all errors must be acknowledged individually. Once all error messages were addressed the error icon will be removed and the Create button will become available.



3.5.4 Save and Release Reviews

Once all review detail has been confirmed and error corrected the user has the following options available:

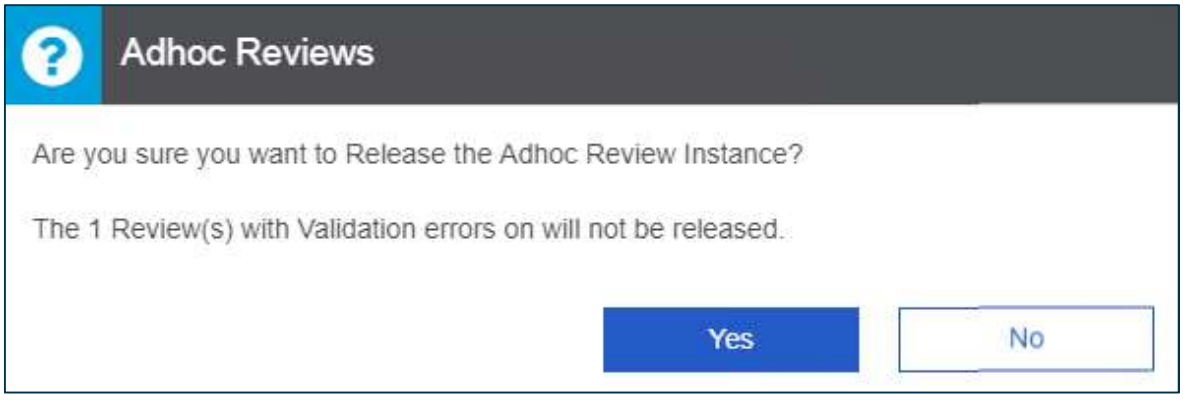
Field Name	Description
Save Review	Save any changes made on the review. This option will only become available once all errors have been acknowledged.
Delete Review	Delete the selected review from the Review Instance.
Cancel	Cancel all changes made.
Close	Close the current screen, if changes were made to errors which was not saved these changes will be lost.



Once all validation errors have been corrected and the “Invalid Reviews” column has been cleared the review instance can be released.

Select the specific Review Instance and select the Release  icon in the action bar. All reviews will be released directly to the reviewer’s inboxes. HR created reviews do not require the Contract Owner to accept and release the reviews.

If a review instance with Invalid Reviews is selected to be released the user will receive a warning that these reviews will not be created. The invalid reviews will be discarded and cannot be corrected at a later stage to be released.



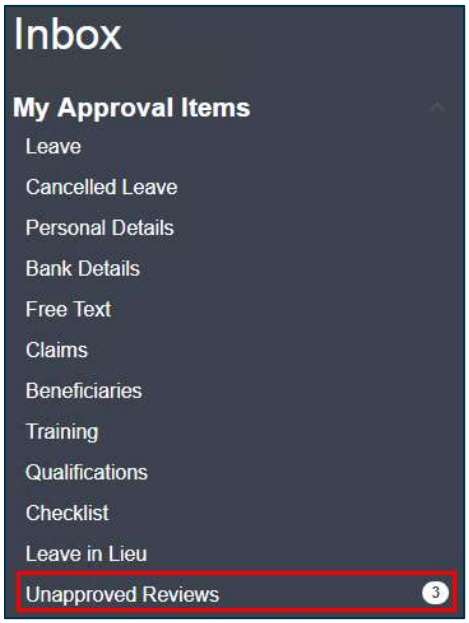
3.6 Unapproved Reviews

All reviews created by any of the below methods will be created on the Contract Owners “Unapproved Reviews” section in the Self-Service Inbox, this is to ensure the review is still valid and the correct reviewers has been selected.

- Mandatory Reviews
- Probation Reviews
- Adhoc Reviews created on Self Service
- Adhoc Reviews created on People Online

To access the unapproved reviews on Self Service:

Select **Inbox**
Select **Unapproved Reviews**



A list of the unapproved reviews for the Contract Owner to approve will be displayed.

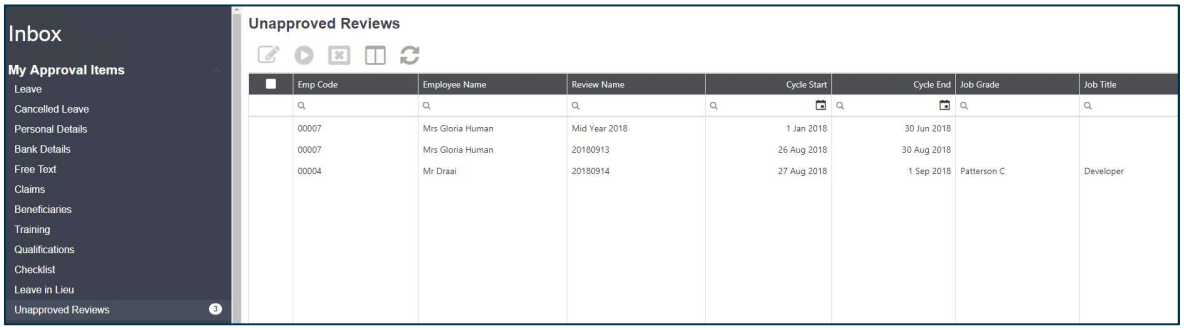
The following action icons are available on the Unapproved Reviews screen:

Icon	Description	Function
	Edit	Edit the selected Review. Edit will only be available if one review only is selected.
	Release	Release the reviews to the reviewers Inbox. Multiple reviews can be released at the same time.

Icon	Description	Function
	Close	Close the review, the review status will change to closed and will not be released to the reviewers' Inbox.
	Column Chooser	Select to add or remove columns from the layout of the Unapproved Reviews screen.
	Refresh	Refresh the current screen.

Unapproved Review screen Layout:

Field Name	Description
Selection Box	Select the review/s to action.
Emp Code	Display the employee code for the employee selected to be reviewed.
Employee Name	Display the Employee Display Name for the Employee selected to be reviewed.
Review Name	Name of the review.
Cycle Start	Review cycle start date.
Cycle End	Review cycle end date.
Job Grade	Job Grade for the Employee selected to be reviewed.
Job Title	Job Title for the Employee selected to be reviewed.
Additional Columns	The following additional columns are available in the Column chooser: • Approver Entity ID • Contract Header ID • Employee First Name • Employee Entity ID • Employee Last Name • Employee Known As Name • Employee ID • Job Title ID • Job Grade ID



It is the Contract Owner's responsibility to ensure that all review details are correct before releasing the review to the reviewers.

Field Name	Description
Review Selection	Indicate all review header selections. All fields can be edited.
Reviewers	Indicate all selected areas, reviewers and weights. All fields are editable and additional reviewers can be added or removed for this specific employee's review. It is important to confirm that the correct criteria items are included in the review with the correct weights allocations.
Reviewer Detail	Indicate the review criteria as per the approved contract which will form part of this review. Review detail cannot be edited as this was approved by all stakeholders during the Performance Contracting phase. Should review detail need to be changed the contract must be edited and the contract approved again by all stakeholders.

The following options are available after the review was reviewed or any amendments made:

Field Name	Description
Cancel	Cancel any changes made to the review.
Save	Save any changes made to the review.
Save & Close	Save any changes made to the review and close the screen.
Save & Release	Save any changes made to the review and Release the review to the reviewer's inboxes.



4.0 Complete Performance Reviews

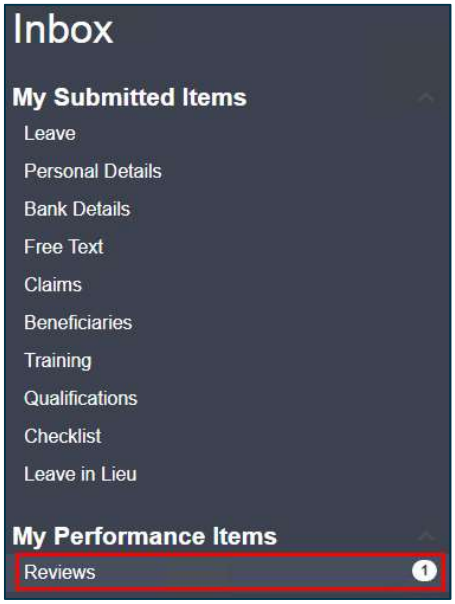
4.1 Self Service Inbox Review

Once the reviews have been released it will be available on each individual reviewers Self Service Inbox under the My Performance Items and Reviews section.

To access the Reviews on Self Service:

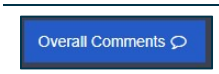
Select **Inbox**

Select **Reviews**

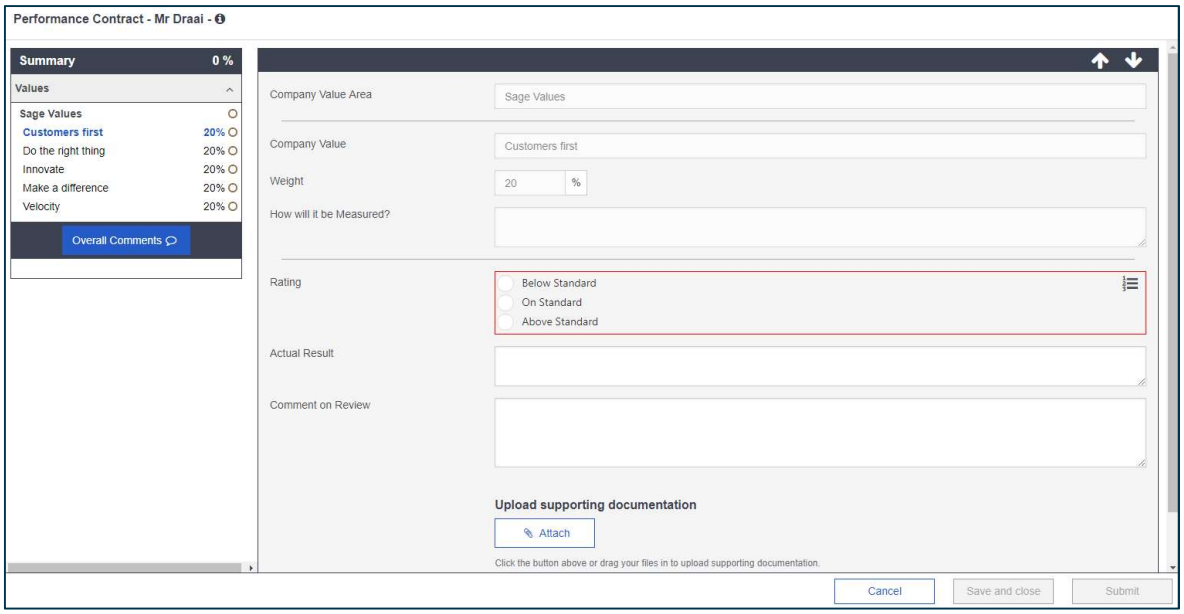


A list of all reviews to be completed will be displayed. The user selects the review to be completed.

The review will be displayed in the same format as the Contract Criteria on the Performance Contract. Navigation and display functionality are available on the review screen.

Icon	Description	Function
	Employee Information	Select to view the details of the employee who is being reviewed.
	Review Percentage	Indicate the percentage of the review already completed.
	Complete Status	Indication of the completion status of each item
	Navigation	Navigate between review items.
	Overall Comments	Select to complete the overall comments on the review.

All details will be “View only” except for the Rating, Actual Result, Comment on Review, Attachments and Overall Comments.



4.1.1 Ratings

Depending on the rating scale selected on the Performance Contract the rating scale can be displayed in any of the formats below:

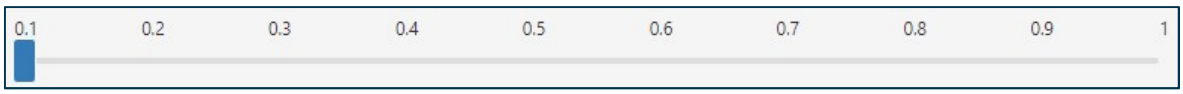
- Descriptions



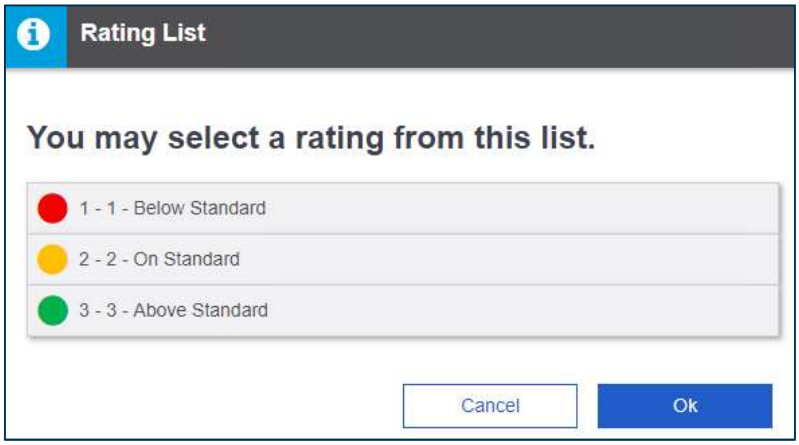
- Images



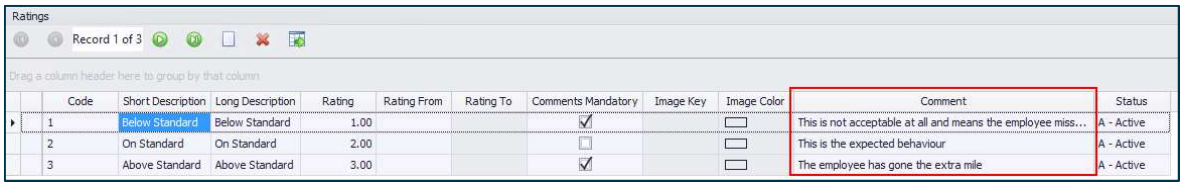
- Sliding bar

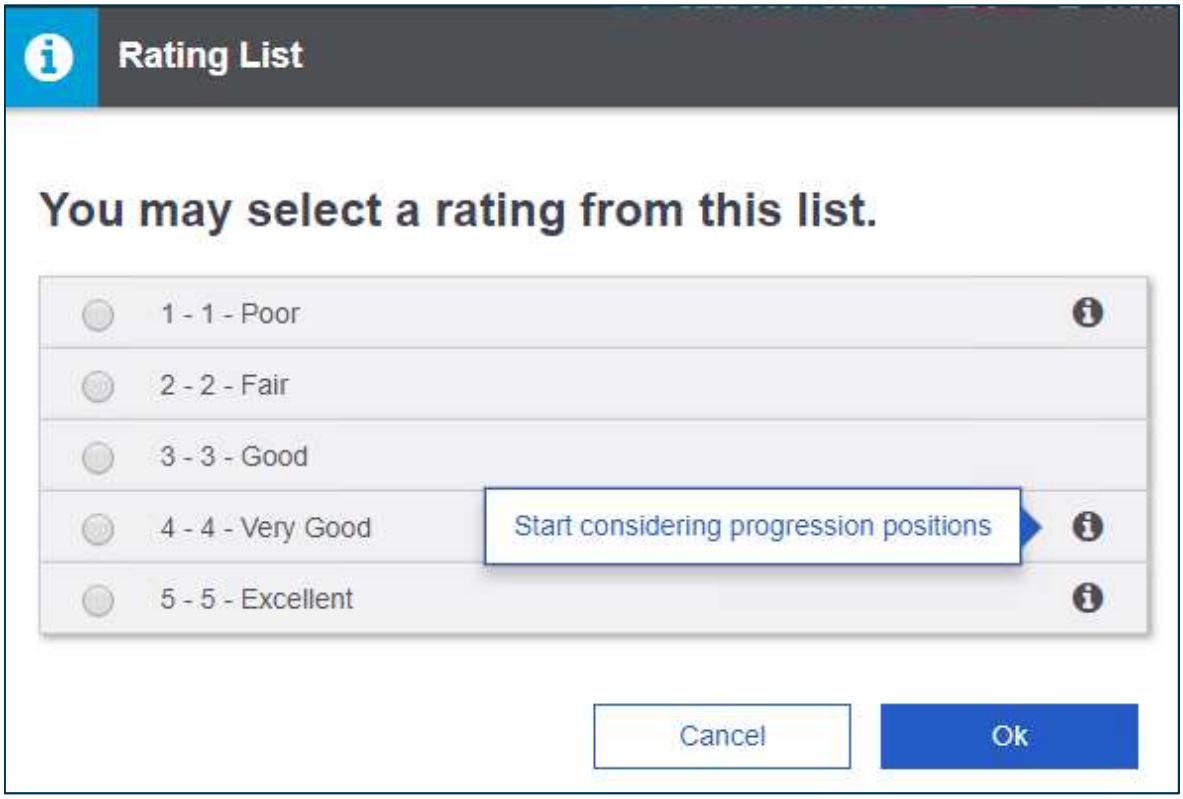


- List – Select the  icon on the right of the rating field



- Rating Scale comments - The comments captured on the Rating scale on 300 People will be visible when selecting the icon and then selecting the icon.





4.1.2 Actual Result

The Actual Result is a text field for the reviewer to complete the actual results for the specific review item.

4.1.3 Comment on Review

The comment available on reviews is a text field for the reviewer to give comments for the specific review item.

Depending on the rating scale and the selected rating the comment field could become mandatory.

4.1.4 Attachment

The reviewer can upload multiple documents on each review item.

Once the reviewer is satisfied with the detail on the review the following options are available:

Field Name	Description
Cancel	Cancel any ratings, actual results and comments completed on the review.
Save & Close	Save any ratings, actual results and comments completed on the review and close the screen. The reviewer will have the ability to open and edit the review again.
Submit	Save all ratings, actual results and comments for this review and submit to the Contract Owner. The review will be removed from the reviewer's Inbox.



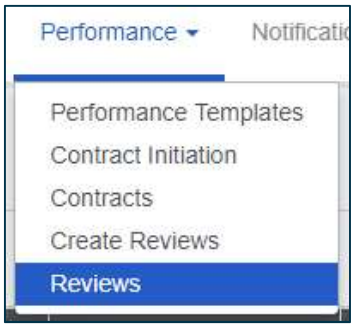
4.2 People Online Review

HR can view, edit and complete a review on behalf of a reviewer on People Online.

To access the reviews on People Online:

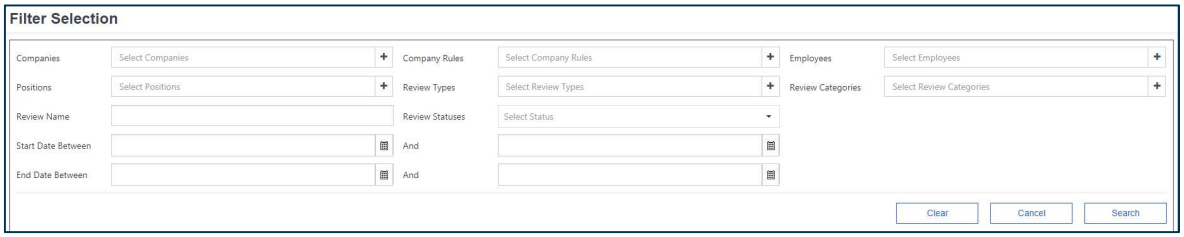
Navigate **Performance**

Select **Reviews**



A filter screen will open, it is advised to filter for the employees for whom reviews must be viewed or completed to avoid loading unnecessary data over your internet line which could slow down.

Field Name	Description
Companies	Select to filter for employees linked to specific companies. Security will apply, and you will only be able to view the companies and employees for whom you have access. Multiple companies can be selected.
Company Rules	Select to filter for employees linked to specific company rules. If a company has been selected only the company rules linked to that company will be displayed. Security will apply, and you will only be able to view the companies and employees for whom you have access. Multiple company rules can be selected.
Employees	Select to filter for specific employees, the standard employee search will open.
Positions	Select to filter for employees linked to specific positions.
Review Types	Select to filter for reviews linked to a specific review type.
Review Categories	Select to filter for reviews linked to a specific review category.
Review Name	Select to filter for reviews with a specific name.
Review Statuses	Select to filter for reviews in specific statuses.
Start Date Between	Select to filter for reviews with a cycle start date from a specific date.
And	Select to filter for reviews with a cycle start date until a specific date.
End Date Between	Select to filter for reviews with a cycle end date from a specific date.
And	Select to filter for reviews with a cycle end date until a specific date.
Clear	Clear all filter selections.
Cancel	Cancel the search, the filter screen will close and return to the previous state of the Review screen.
Search	Apply filters and search for specific reviews.

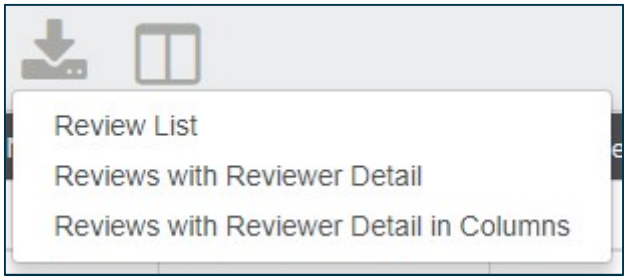


4.2.1 People Online Review Screen

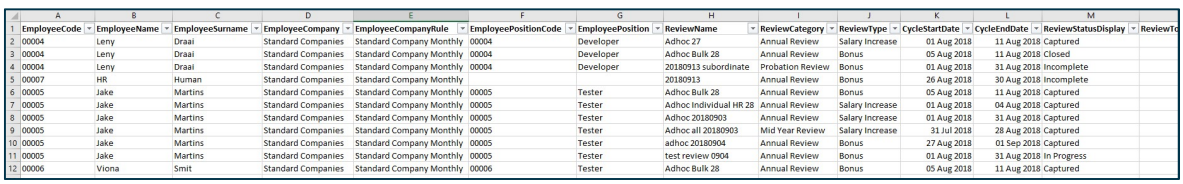
The Reviews screen will open with the following action icons at the top:

Icon	Description	Function
	Filter	Open the Filter screen and will allow for new filters to be applied.
	Refresh	Refresh the current layout and update any information.
	Export	Export the review list with all columns. Multiple export options are available as per below description.
	Column Chooser	Allow to include or exclude grid columns as per the user's requirements.

The review Export Action Icon allows the user to export the review details in 3 different layouts:



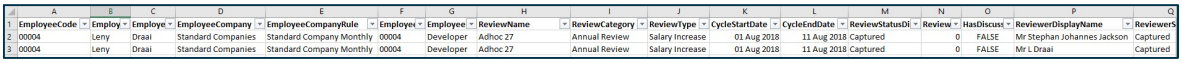
- Review List – Export a list of all reviews on screen in similar format than on the screen



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	EmployeeCode	EmployeeName	EmployeeSurname	EmployeeCompany	EmployeeCompanyRule	EmployeePositionCode	EmployeePosition	ReviewName	ReviewCategory	ReviewType	CycleStartDate	CycleEndDate	ReviewStatusDisplay
2	00004	Leny	Draai	Standard Companies	Standard Company Monthly	00004	Developer	Adhoc 27	Annual Review	Salary Increase	01 Aug 2018	11 Aug 2018	Captured
3	00004	Leny	Draai	Standard Companies	Standard Company Monthly	00004	Developer	Adhoc Bulk 28	Annual Review	Bonus	05 Aug 2018	11 Aug 2018	Closed
4	00004	Leny	Draai	Standard Companies	Standard Company Monthly	00004	Developer	20180913 subordinate	Probation Review	Bonus	01 Aug 2018	31 Aug 2018	Incomplete
5	00007	HR	Human	Standard Companies	Standard Company Monthly			20180913	Annual Review	Bonus	26 Aug 2018	30 Aug 2018	Incomplete
6	00005	Jake	Martins	Standard Companies	Standard Company Monthly	00005	Tester	Adhoc Bulk 28	Annual Review	Bonus	05 Aug 2018	11 Aug 2018	Captured
7	00005	Jake	Martins	Standard Companies	Standard Company Monthly	00005	Tester	Adhoc Individual HR 28	Annual Review	Salary Increase	01 Aug 2018	04 Aug 2018	Captured
8	00005	Jake	Martins	Standard Companies	Standard Company Monthly	00005	Tester	Adhoc 20180903	Annual Review	Salary Increase	01 Aug 2018	31 Aug 2018	Captured
9	00005	Jake	Martins	Standard Companies	Standard Company Monthly	00005	Tester	Adhoc all 20180903	Mid Year Review	Salary Increase	31 Jul 2018	28 Aug 2018	Captured
10	00005	Jake	Martins	Standard Companies	Standard Company Monthly	00005	Tester	adhoc 20180904	Annual Review	Bonus	27 Aug 2018	01 Sep 2018	Captured
11	00005	Jake	Martins	Standard Companies	Standard Company Monthly	00005	Tester	test review 0904	Annual Review	Bonus	01 Aug 2018	31 Aug 2018	In Progress
12	00006	Viona	Smit	Standard Companies	Standard Company Monthly	00006	Tester	Adhoc Bulk 28	Annual Review	Bonus	05 Aug 2018	11 Aug 2018	Captured

- Reviews with Reviewer Detail – Export a list of all reviews on screen with the details of each reviewer on each specific review in rows.

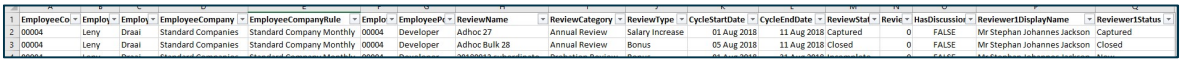
Example:
Review for Mr Kim
Reviewer 1 = Mr Kim
Reviewer 2 = Ms Dino
Reviewer 3 = Mr Francis
The export will show 3 rows for the same review for Mr Kim with the details of each separate reviewer in each row.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	EmployeeCode	Employ	Employe	EmployeeCompany	EmployeeCompanyRule	Employe	Employee	ReviewName	ReviewCategory	ReviewType	CycleStartDate	CycleEndDate	ReviewStatusDi	Review	HasDiscuss	ReviewerDisplayName	ReviewerS
2	00004	Leny	Draai	Standard Companies	Standard Company Monthly	00004	Developer	Adhoc 27	Annual Review	Salary Increase	01 Aug 2018	11 Aug 2018	Captured	0	FALSE	Mr Stephan Johannes Jackson	Captured
3	00004	Leny	Draai	Standard Companies	Standard Company Monthly	00004	Developer	Adhoc 27	Annual Review	Salary Increase	01 Aug 2018	11 Aug 2018	Captured	0	FALSE	Mr L Draai	Captured

- Reviews with Reviewer Detail in Columns – Export a list of all reviews on screen with the details of each reviewer in columns next to each other.

  Example:
  Review for Mr Kim
  Reviewer 1 = Mr Kim
  Reviewer 2 = Ms Dino
  Reviewer 3 = Mr Francis
  The export will show 1 row for the review for Mr Kim with the details of each separate reviewer in columns next to each other.

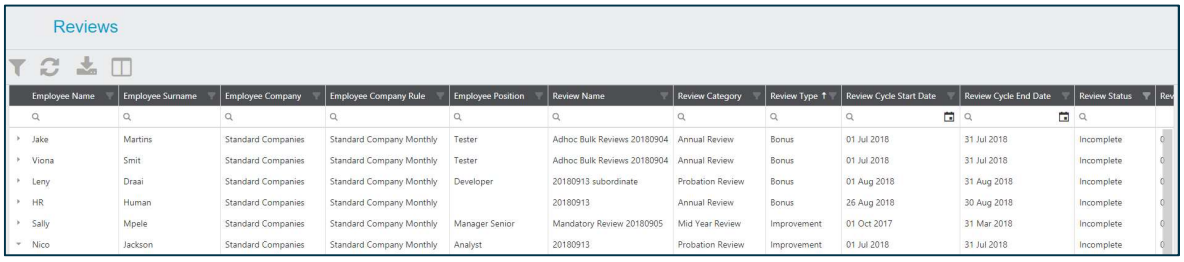


	EmployeeCo	Employ	Employ	EmployeeCompany	EmployeeCompanyRule	Employ	EmployeePc	ReviewName	ReviewCategory	ReviewType	CycleStartDate	CycleEndDate	ReviewStat	Revie	HasDiscussio	Reviewer1DisplayName	Reviewer1Status
2	00004	Leny	Draai	Standard Companies	Standard Company Monthly	00004	Developer	Adhoc 27	Annual Review	Salary Increase	01 Aug 2018	11 Aug 2018	Captured	0	FALSE	Mr Stephan Johannes Jackson	Captured
3	00004	Leny	Draai	Standard Companies	Standard Company Monthly	00004	Developer	Adhoc Bulk 28	Annual Review	Bonus	05 Aug 2018	11 Aug 2018	Closed	0	FALSE	Mr Stephan Johannes Jackson	Closed

The Review screen layout:

Field Name	Description
Expand 	Expand the review for the specific employee to see all reviewers on this review
Employee Name	Display the reviewee's name.
Employee Surname	Display the reviewee's surname.
Employee Company	Display the reviewee's company.
Employee Company Rule	Display the reviewee's company rule.
Employee Position	Display the reviewee's position.
Review Name	Display the specific review name.
Review Category	Display the Review Category linked to the review.
Review Type	Display the Review Type linked to the review.
Review Cycle Start Date	Display the review's cycle start date.
Review Cycle End Date	Display the review's cycle end date.

Field Name	Description
Review Status	Display the Review Status, the following statuses are available: • Incomplete – The reviews have not yet been released to the reviewer's inboxes or none of the reviewers has started the review process • In Progress – some of the reviewers has started the review process on this specific review • Captured – all reviewers have completed the review process and submitted the reviews • Closed – The Review has been closed and thus removed from all reviewers' inboxes
Review Total Actual	Display the total actual for the review once the results have been finalized.



4.2.2 Individual Reviewers Screen

HR can expand the reviews by selecting the expand icon  next to the Employee Name field to view more details of the reviewers on each review as well as to action the following per reviewer:

Icon	Description	Function
	View	View the review details, ratings, actual results and comments made by the specific reviewer on this review.
	Edit	Edit the ratings, actual results and comments on behalf of the specific reviewer. Edit will not be available on any review once a discussion and/or calibration rating has been completed on the Review Result screen. Closed reviews can be edited and submitted, this allows for HR to correct any mistakes.
	Close	Close the review for the specific reviewer, the review will be removed from the reviewer's inbox.

Icon	Description	Function
		If the reviewer had any weights allocated to his rating the review will be calculated at a lower percentage.

Reviewers screen layout:

Field Name	Description
Selection box	Select the reviewer to view, edit or close.
Reviewer Name	The name of the specific reviewer.
Review Name	The name of the review.
Review Cycle Start Date	Cycle start date for the review.
Review Cycle End Date	Cycle end date for the review.
Review Status	Status of this reviewers review of this specific review: • New – the review has not been started at all and is still available in the reviewers Inbox • In Progress – the reviewer has started the review but has not submit yet • Captured – the review has been completed and submitted

4.2.3 Capture Review on People Online

The HR user select the specific review and reviewer and select to edit the review. The review will open in the same format as on the reviewers Self Service Inbox. HR will complete the review on behalf of the reviewers. All ratings and comments captured by HR while the review status is New or In Progress will reflect on the review in the reviewers Self Service Inbox. The review will only be removed from the reviewer's inbox once the submit action is selected.

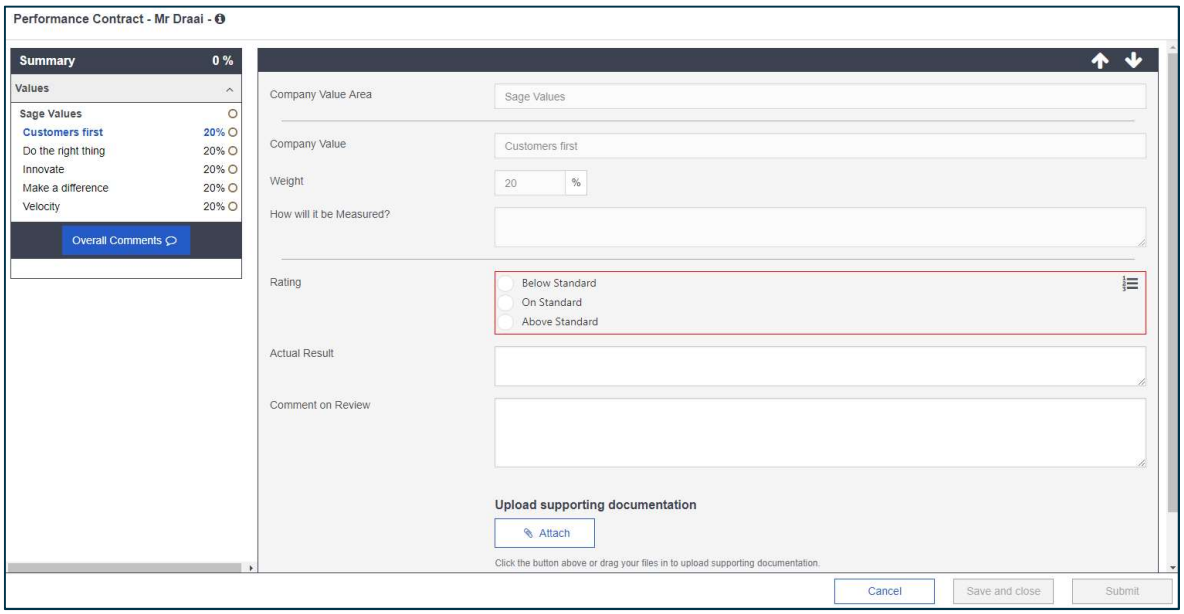
Navigation and display functionality are available on the review screen.

Icon	Description	Function
	Employee Information	Select to view the details of the employee who is being reviewed.
	Review Percentage	Indicate the percentage of the review already completed.
	Complete Status	Indication of the completion status of each item.
	Navigation	Navigate between review items.

Icon	Description	Function
Overall Comments	Overall Comments	Select to complete the overall comments on the review.

All details will be view only except for the Rating, Actual Result, Comment on Review, Attachments and Overall Comments.

HR can capture the Rating, Actual Results, Comments and Attachments and Save or Submit once completed. As soon as Submit is selected the review will be removed from the reviewers Self Service and Inbox and the review status changed to Captured.



5.0 Review Results

The review results for each individual review will be available on the individual Performance Contract.

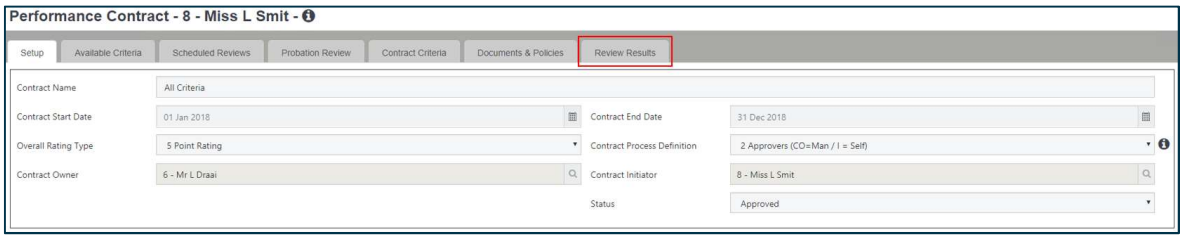
The Performance Review Results can be accessed from different areas

To access the Performance Review Results as a **Manager**:

Open	**Self Service**
Navigate to	**Performance**
Select	**Contracts**
Select	**Specific Performance Contract (Edit or View)**
Select	**Review Results Tab**

To access the Performance Review Results as a **HR user**:

Open	**People Online**
Navigate to	**Performance**
Select	**Contracts**
Select	**Specific Performance Contract (Edit or View)**
Select	**Review Results Tab**



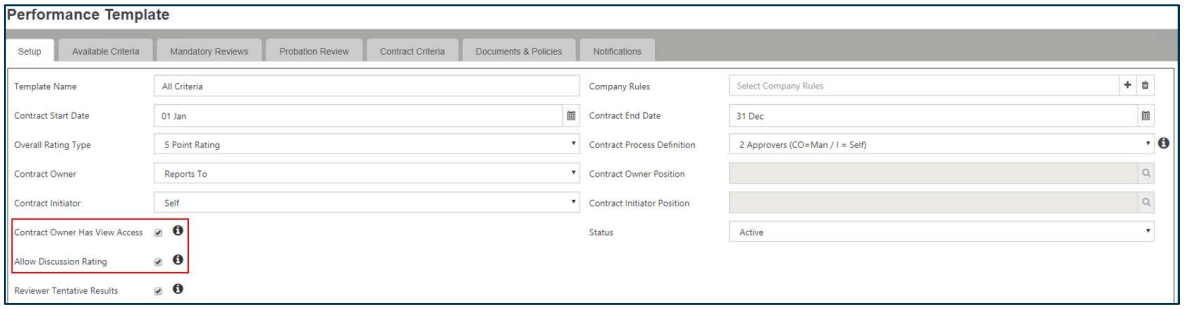
Multiple reviews can be done on the same performance contract during the performance contract cycle as there could be monthly reviews, mid-year reviews, annual reviews and any other customer specific reviews during the performance contract period. All the reviews results will be displayed on the Review Results tab on the Performance Contract.

5.1.1 Performance Contract Selections

The following initial Performance Contract selections will have an impact on the Review Results tab functionality:

1. **Contract Owner Has View Access** – If this option was selected on the Performance Template and contract then the Contract Owner will have the ability to view ratings and comments made by the reviewers before all reviewers have completed the reviews. If this was not selected the Contract Owner will only be able to view the ratings and comments once all reviewers have completed the reviews of the employee.

2. **Allow Discussion Rating** – If this option was selected on the Performance Template and contract then the Contract Owner will have the ability to add an additional rating and comment on the Review Results screen which will have a 100% weight for the specific item. This functionality allows the Contract Owner to amend the ratings on an individual item level should the employee be able to prove that they require a different rating during the performance discussion. If this was not selected the Discussion Rating and Comment will not be visible on the Review Result tab and the ratings will be calculated as per the original weight allocation on the different reviewers.



5.2 Review Results

A list of all reviews created on the specific Performance Contract will be displayed, the reviews can all be at different stages of completion depending on the company review release and completion cycles.

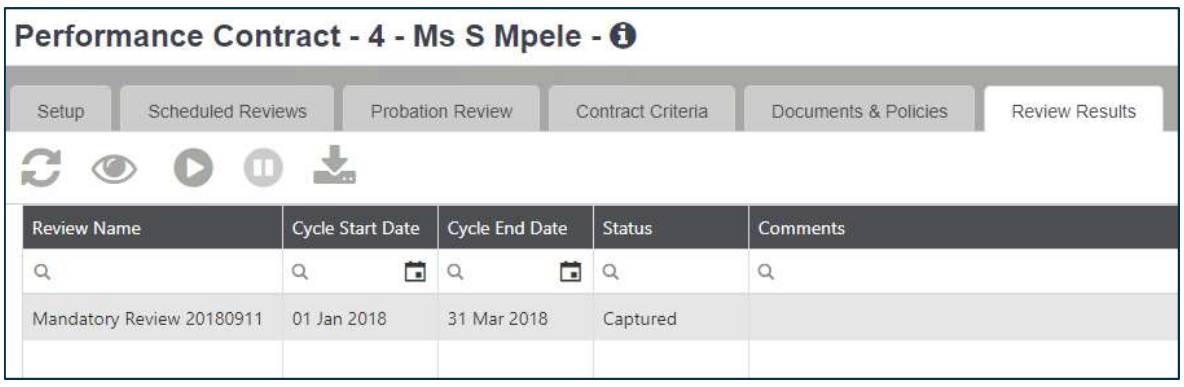
The following Action Icons are available on the Review Results screen:

Icon	Description	Function
	View	View the selected review detailed results and edit selected fields.
	Release	Release the selected review results to the employee for acknowledgement.
	Recall	Recall the selected review results from the employees Inbox should additional changes be required.
	Refresh	Refresh the review result screen.

Icon	Description	Function
	Export	Export the selected review results to excel.

The Review Results screen layout:

Field Name	Description
Review Name	Names of the individual reviews.
Cycle Start Date	Review's cycle start date.
Cycle End Date	Review's cycle end date.
Status	The Review status • Incomplete – no ratings have been captured yet • In Progress – some reviewers have captured ratings • Captured – all ratings have been captured • Closed – the review was closed from either People Online or the contract to which the review was linked, has been closed. • Awaiting Acknowledgement – Results have been released to the employees Inbox • Acknowledged • Disputed
Comments	Comments on the acknowledgement of the review by the employee



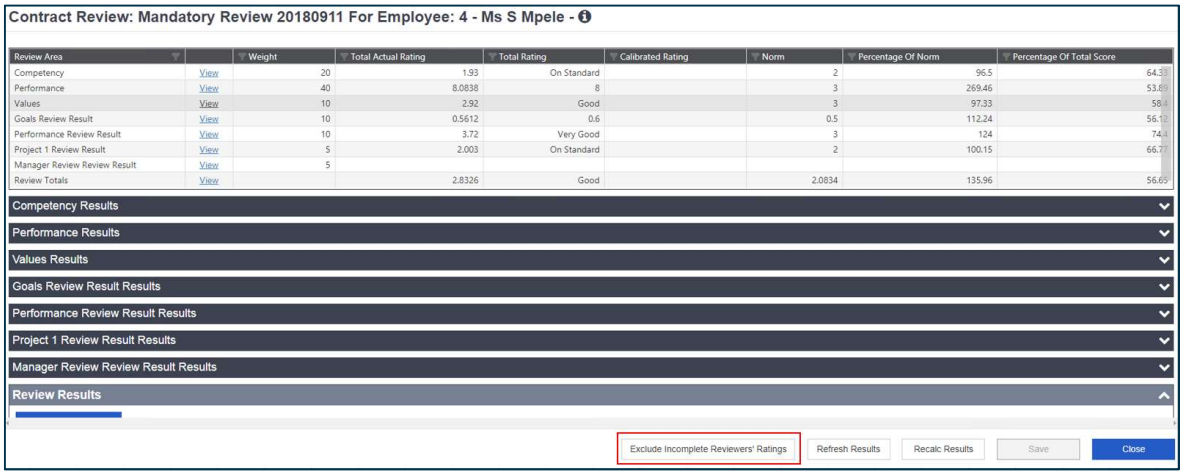
5.2.1 Exclude Incomplete Reviewers

The Contract Owner can exclude reviewers who have not completed the review to calculate and finalise the review results. Once a reviewer has been excluded from the review it will be removed from his inbox and his review status will change to "Closed".

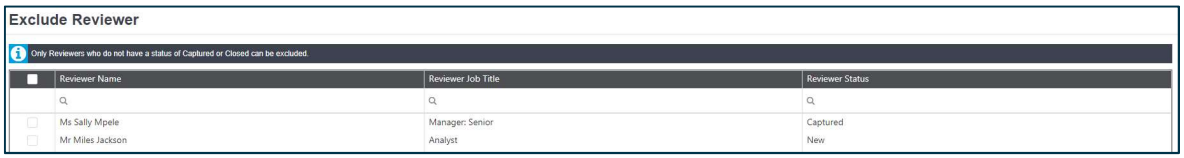
The review total weight will be reduced by any weight % allocated to the excluded reviewer(s).

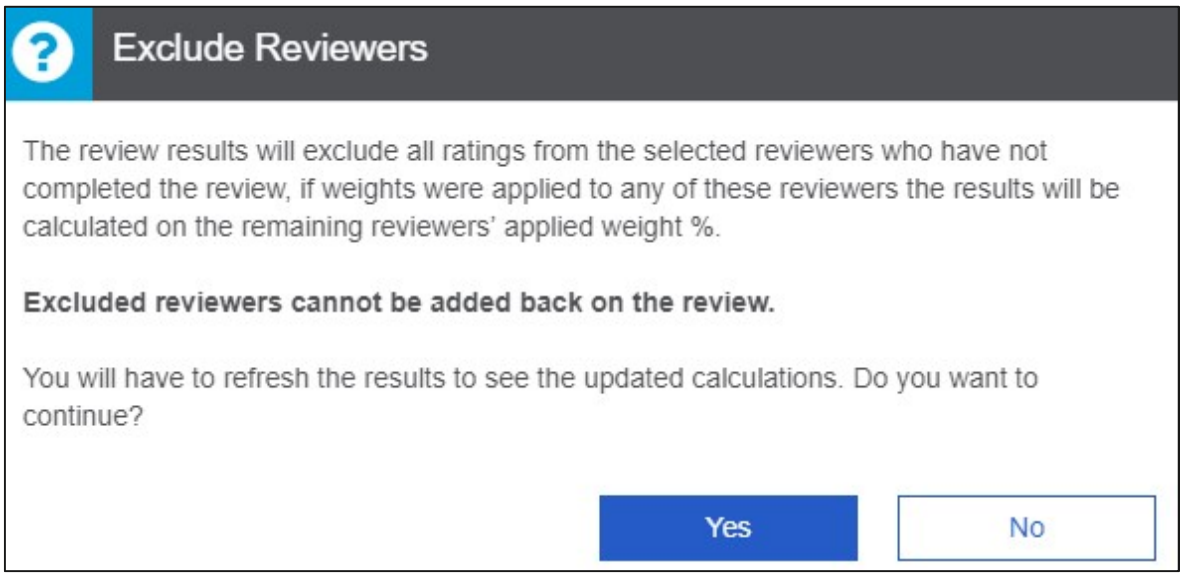
Only HR will have the ability to include the excluded reviewer/s in the review results again from the reviews screen on People Online, however as soon as a discussion or calibration rating has been captured on the review result, then it will no longer be possible to include excluded reviewers again as the system assumes that a discussion with the employee has commenced.

At the bottom of the Review Results select the option “Exclude Incomplete Reviewers Ratings”



A new screen will open with the list of reviewers on this review. Only reviewer(s) with a status other than Captured or Closed can be excluded. Select the reviewer(s) and select the “Exclude Selected” option at the bottom of the screen.





All reviewers who has been excluded will be indicated in red and with a strikethrough on the Review Results:



Key Performance Area	Weight	Key Performance Indicator	Weight	Norm	Ms S Mpele (60%)	Mr Stephan Johannes Jackson (40%)	Reviewers' Row Total	Discussion
Client							Rating: 1.8	
		Load Client KPI Here	20	7	Rating: 7		Rating: 7	

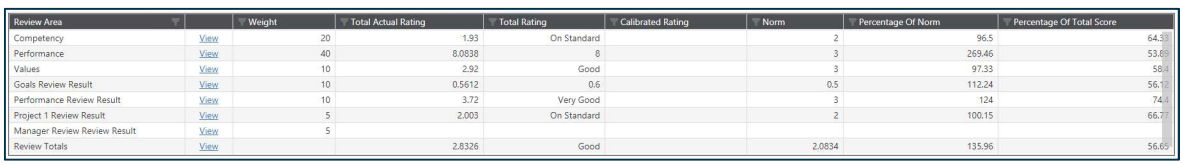
5.2.2 View Review Results

Select the specific review by highlighting it and then select the View  icon. The review detail will open with a summary and the different detailed areas.

5.2.1.1 Review Rating Summary

All details displayed on the review summary is defaulted from the detailed sections, review rating summary layout:

Field Name	Description
Review Area	All areas included in the review will be displayed here. Example: If the review was done on Competencies, Values and one Free Text named “Goals” then only these 3 areas will be displayed with the Review Totals.
View	Quick link for easy navigation to the specific area. The user can select on the specific area name to expand the details as well.
Weight	The weight allocated to each area during the review setup. This weight will be used in the results calculation.
Total Actual Rating	Total Actual Rating for each specific area.
Total Rating	Total Rating on the rating scale for each specific area, different ratings scales could have been used for different sections and thus the description could be different here depending on the scale used.
Calibrated Rating	Calibrated rating for each area, calibrated ratings are not compulsory, this column could be blank or only populated at a later stage.
Norm	The Norm rating for the specific area.
Percentage of Norm	Percentage of the Norm achieved for the specific area.
Percentage of Total Score	Percentage of the Total Score achieved for the specific area.



Review Area		Weight	Total Actual Rating	Total Rating	Calibrated Rating	Norm	Percentage Of Norm	Percentage Of Total Score
Competency	View	20	1.93	On Standard		2	96.5	64.3
Performance	View	40	8.0838	8		3	269.46	53.8
Values	View	10	2.92	Good		3	97.33	58.4
Goals Review Result	View	10	0.5612	0.6		0.5	112.24	56.1
Performance Review Result	View	10	3.72	Very Good		3	124	74.4
Project 1 Review Result	View	5	2.003	On Standard		2	100.15	66.7
Manager Review Review Result	View	5						
Review Totals	View		2.8326	Good		2.0834	135.96	56.65

5.2.1.2 Detailed Areas Results

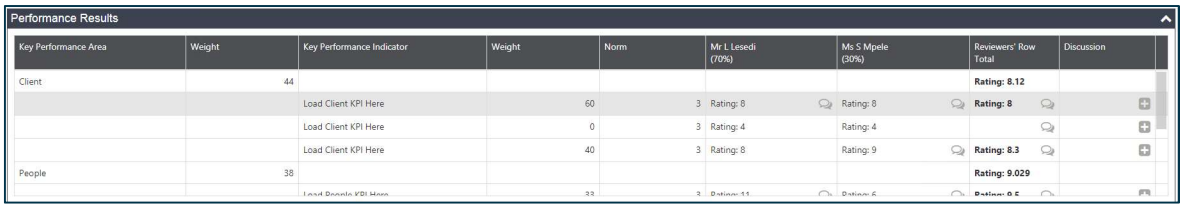
Depending on the areas included in the review there could be up to seven detailed areas displayed.

To expand each area, click on the area header or use the expand icons on the left corner of each area header. The detailed areas can also be expanded by selecting the “View” link in the summary section at the top.

The layout of the different areas will be similar except for the levels used on each area:

Field Name	Description
Level 1	Depending on the setup used and could be either of the following: • Competency Area • Key Performance Area • Value Area • Free Text Item Description
Level 1 Weight	Depending on the setup and whether weights are used on this Level the weight allocated to the item could be displayed.
Level 2	Depending on the setup used and could be either of the following: • Competency • Key Performance Indicator • Value
Level 2 Weight	Depending on the setup and whether weights are used on this level the weight allocated to the item could be displayed.
Level 3	Depending on the setup used and could be either of the following: • Sub-Competency • Sub-Key Performance Indicator
Level 3 Weight	Depending on the setup and whether weights are used on this level the weight allocated to the item could be displayed.
Norm	Indicate the norm on the selected level as per the setup
Reviewer 1	Indicate the name and weight % of the first reviewer. Ratings: Display the reviewers rating per item. Comments and Actual Results: Display comments made by the reviewer per item with the  icon. Select this icon to view the details.
Reviewer 2	Indicate the name and weight % of the second reviewer. Ratings: Display the reviewers rating per item. Comments and Actual Results: Display comments made by the reviewer per item with the  icon. Select this icon to view the details.

Field Name	Description
Additional Reviewers	Depending on the number of reviewers selected additional columns will be displayed with each reviewer name and weights % as well as their ratings and comments.
Reviewers Row Total	Calculate the row total using the reviewer ratings and weights. For multiple levels the calculation will include the item weight in the calculations.
Discussion	Only available if Discussion was selected to be available on the Performance Contracts. Allow the user to add  an additional rating and comment per item. The discussion rating is not linked to an entity/employee and will be allocated 100% weight for the item if used. Example: Reviewer 1 = 45% (Rating = 3 thus 1.35) Reviewer 2 = 40% (Rating = 2 thus 0.8) Reviewer 3 = 15% (Rating = 2 thus 0.3) Reviewers Row Total for this item = **2.45** During the performance discussion the manager and employee agree that the employee's rating is actually a **3** and was marked down due to external factors. The manager can now add a discussion rating of 3 and add a comment for the reason of this amendment. The discussion rating weight will now be 100% and the weights on the three reviewers will no longer be used in the calculation of this item. The row total for this item will now be **3**.



5.2.1.2.1 Area Review Results

The Area Review Totals will be displayed at the bottom of the detailed results for each area. If a discussion rating is captured the result totals will clear and the user will need to "Recalc Results" at the bottom of the screen. The "Recalc Results" button will turn blue to prompt the user that a recalculation is required.

Field Name	Description
Total Actual Rating	Total Actual Rating for the specific area based on the Row Totals and Level weights.
Total Rating	Total rating on the Rating scale used on the area.
Norm Rating Specified	The Norm rating for the specific area.
Total Norm Rating	The Norm rating on the Rating Scale used on the area.
Percentage of Norm	Percentage of the Norm achieved for the specific area.
Percentage of Total Score	Percentage of the Total Score achieved for the specific area.



5.2.1.2.2 Area Result Calibration

The Area Result Calibration section will be displayed under the Area Review Results. This is where the manager can add a calibration rating should further calibration be required.

If a calibration rating was captured, then this rating will be used as the final rating for the Area.

Field Name	Description
Total Calibrated	Enter or select the calibrated rating from the Rating Scale.
Total Calibrated Rating	Total Calibrated Rating on the Rating scale used on the area.
Calibration Approved By	It is mandatory to select the entity who approved the calibration score.
Percentage of Norm	Percentage of the Norm achieved for the specific area based on the calibrated score.
Percentage of Total Score	Percentage of the Total Score achieved for the specific area based on the calibrated score.



5.2.1.3 Overall Review Results

The last section will always be the Overall Review Results which will be calculated as per the weight allocations for each area as well as the total ratings or calibration ratings per area.

The Overall Comments made by each reviewer will be displayed when selecting the “Overall Comments” button below the “Review Results” header.



5.2.1.3.1 Review Result

Field Name	Description
Total Actual Rating	Total Actual Rating for the review based on the weights allocated to each area and the total area rating.
Total Rating	Total Rating on the Overall Rating scale indicated on the Performance Contract setup.
Norm Rating Specified	The Norm rating for the specific area.
Total Norm Rating	The Norm rating on the Rating Scale indicated on the Performance Contract setup.
Percentage of Norm	Percentage of the Norm achieved for the review based on the Overall Rating scale indicated on the Performance Contract setup.
Percentage of Total Score	Percentage of the Total Score achieved based on the Overall Rating scale indicated on the Performance Contract setup.



5.2.1.3.2 Review Result Calibration

If a calibration result is captured here this will be used as the result for the full review.

Field Name	Description
Total Calibrated	Enter or select the calibrated rating from the Overall Rating Scale.
Total Calibrated Rating	Total Calibrated Rating on the Overall Rating scale used on the Performance Contract Setup.
Calibration Approved By	It is mandatory to select the entity who approved the calibration score.

Field Name	Description
Percentage of Norm	Percentage of the Norm achieved for the review based on the calibrated score using the Overall Rating scale indicated on the Performance Contract setup.
Percentage of Total Score	Percentage of the Total Score achieved for the review based on the calibrated score using the Overall Rating scale indicated on the Performance Contract setup.
Summary of strenghts	Text field to capture the strengths of the employee discussed during the Performance Discussion
Summary of Focus Areas	Text field to capture the focus areas of the employee discussed during the Performance Discussion



5.2.3 Release Reviews

After the performance discussion and once all performance review ratings have been checked or corrected on the Review Result screen the results are ready to be released to the employee.

Select the review to be released and select the “Release”  icon. There are three options available to release the results:

- Release All – **Caution!** This option will release the review results as well as all reviewers’ ratings and comments, thus the employee will see what other reviewers rated and commented on each item.
- Release Limited - This option will only release the employees own ratings and comments as well as the Contract Owners ratings and comments and any Discussion ratings and comments.
- Release Results Only – This option will only release the final and calibrated ratings per reviews area. No individual ratings and comments will be displayed.



Once the review results has been released to the employee the Review Status will change to “Awaiting Acknowledgement” and the results cannot be edited any longer.

5.2.4 Recall Reviews

Should the Contract Owner realise that the results were incorrect and must be corrected, the Review Results can be removed from the employee's inbox to be able to edit again before the Review Results is released again to the employee.

Select the relevant review and select the "Recall" icon. The icon will only be available to select if the results has already been released. Once the "Recall" is selected the results will be removed from the employee's inbox and he will be sent a notification to inform that the results has been recalled.

The Contract Owner will now have the ability to make changes to the results as required and release again when ready.

5.2.5 Export Review Results

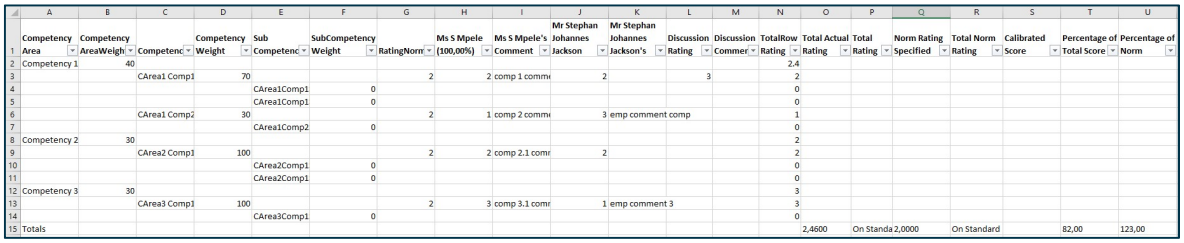
An excel export with all review results data for reporting purposes is available on the Review Result Tab on the Contract. Select the specific review and the Export  icon.

The Review results will be exported in the following format to excel:

Sheet 1: Summary of the Review and results

	A	B	C	D	E	F	G
1	**Employee Details**						
2	Employee Code						
3	Employee Name						
4	Employee Surname						
5	Review Name						
6	Review Cycle Start						
7	Review Cycle End						
8	Position or Job Title						
9	Review Category						
10	Review Type						
11	Reviewer 1						
12	Reviewer 2						
13							
14	**Consolidated Results**						
15	Review Type	Actual Score	Calibrated Total	Weight	Percentage of Norm	Percentage of Total Score	Overall Review Total
16	Competency						
17	Performance						
18	Review Total						
19							
20	**Summary of Strengths**						
21							
22							
23	**Summary of Focus Areas**						
24							
25							
26	**Overall Summary**						
27	**Ms Sally Mpele :**						
28							
29	**Mr Miles Jackson :**						
30							

Sheet 2 – 8: Depending on the Areas Included in the review a new sheet will be created for each area (Competency, Performance, Values, Free Text) with all review details, reviewer ratings and comments as well as overall results.



	Competency Area	Competency AreaWeigh	Competenc	Competency Weight	Sub Competenc	SubCompetency Weight	RatingNorm	Ms S Mpele (100,00%)	Ms S Mpele's Comment	Mr Stephan Johannes Jackson	Mr Stephan Johannes Jackson's	Discussion Rating	Discussion Commer	TotalRow Rating	Total Actual Rating	Total Rating	Norm Rating Specified	Total Norm Rating	Calibrated Score	Percentage of Total Score	Percentage of Norm
2	Competency 1	40												2.4							
3			CArea1 Comp1	70			2	2	comp 1 comm	2		3		2							
4					CArea1Comp1	0								0							
5					CArea1Comp1	0								0							
6			CArea1 Comp2	30			2	1	comp 2 comm	3	emp comment comp			1							
7					CArea1Comp2	0								0							
8	Competency 2	30												2							
9			CArea2 Comp1	100			2	2	comp 2.1 comr	2				2							
10					CArea2Comp1	0								0							
11					CArea2Comp1	0								0							
12	Competency 3	30												3							
13			CArea3 Comp1	100			2	3	comp 3.1 comr	1	emp comment 3			3							
14					CArea3Comp1	0								0							
15	Totals														2,4600	On Standa	2,0000	On Standard		82,00	123,00

5.3 Acknowledge Results on Self Service

Depending on the format selection made during the release the employee will have visibility of his Performance Review Results in his Self Service Inbox.

To access the Performance Review Results on the Inbox:

Open	**Self Service**
Navigate to	**Inbox**
Select	**My Performance Items**
Select	**Review Results**

The Review Results screen will open with a list of all review results. The current list will display all previously acknowledged results as well for reference.

The following action icons are available

Icon	Description	Function
	View	View the selected Review detailed results
	Column chooser	Select to add or remove columns in the grid
	Refresh	Refresh the Review Result screen.

The screen layout:

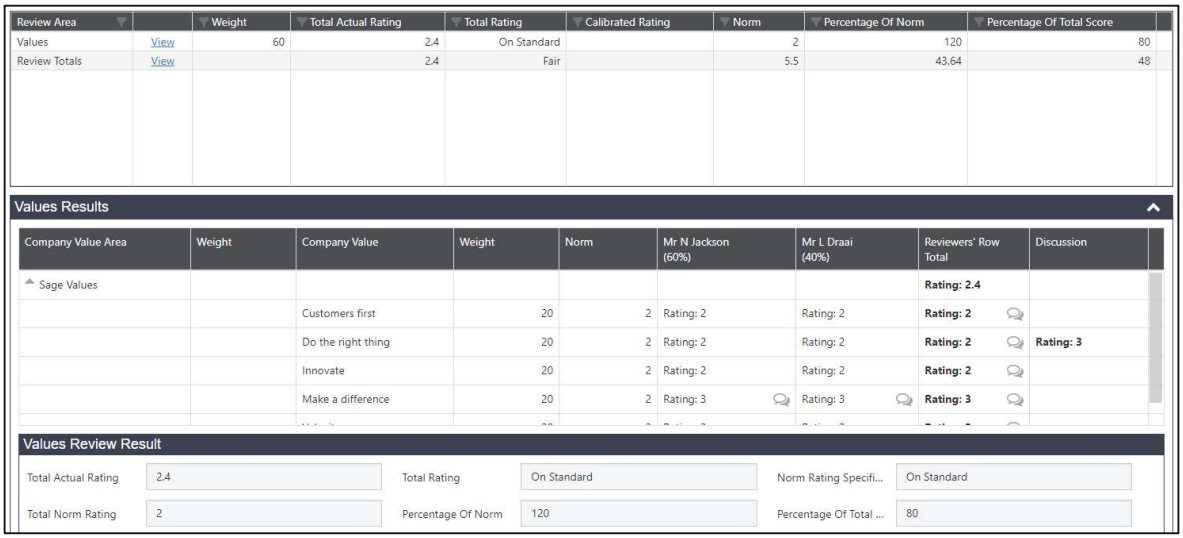
Field Name	Description
Selection	Selection box.
Review Name	The name of the specific review.
Contract Name	The name of the Performance Contract the specific review is linked to.
Cycle Start	The review's cycle start date.
Cycle End	The review's cycle end date.

Field Name	Description
Review Status	The current status of the review, the following statuses are available: • Awaiting Acknowledgement • Acknowledged • Disputed

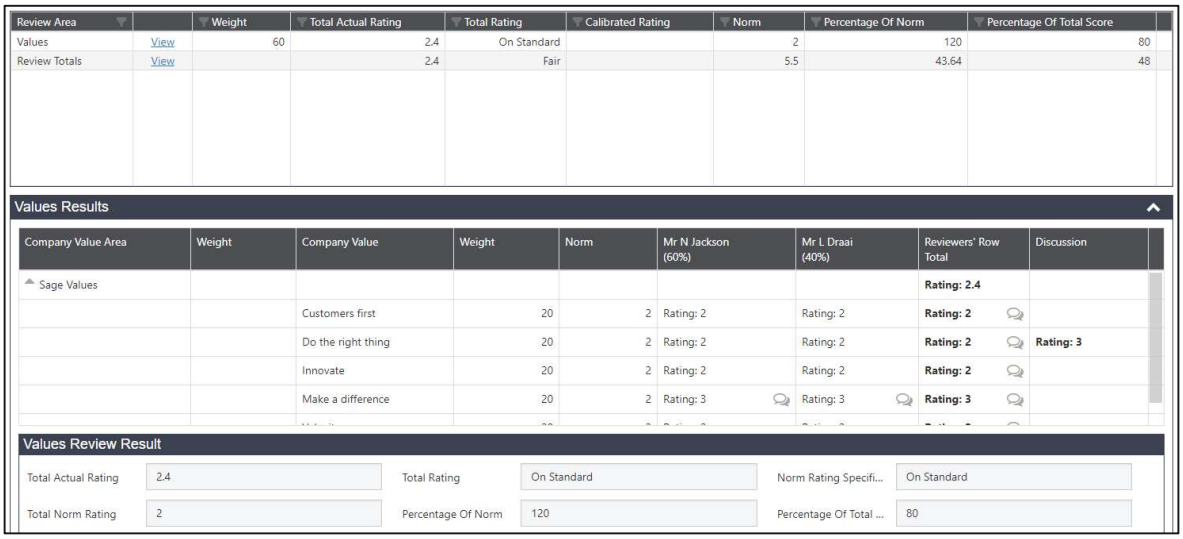
5.3.1 View Results

Select the specific review and select the view icon to display the review results in the specific format selected to release.

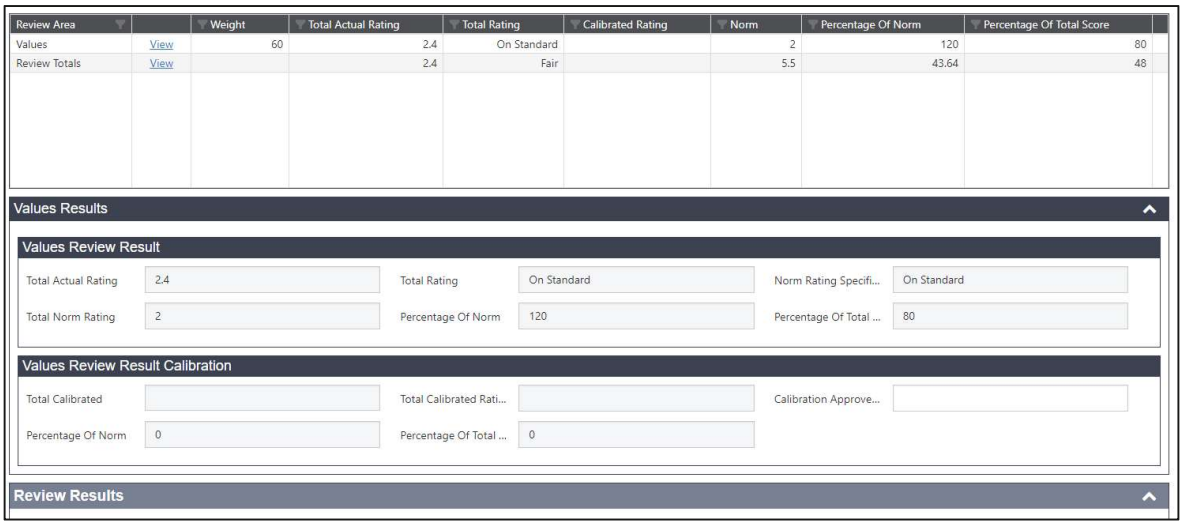
- Release All – **Caution!** This option will display the review results as well as all reviewers' ratings and comments, thus the employee will see what other reviewers rated and commented on each item.



- Release Limited - This option will display the employees own ratings and comments as well as the Contract Owners ratings and comments and any Discussion ratings and comments.



- Release Results Only – This option will display only the final and calibrated ratings per review Area. No individual ratings and comments will be displayed.



5.3.2 Acknowledge Results

At the bottom of the screen the following options are available.

Field Name	Description
Cancel	Close the screen.
Acknowledge & Agree	Select this option to acknowledge the results if agreeing. The status of the review will change to “Acknowledged”.
Acknowledge & Dispute	Select this option to acknowledge the results but indicating the results are disputed. A comment block will open for the employee to note the reasons for the dispute, these comments will be available for the Contract Owner to read on the Review Results screen on the contract. The status of the review will change to “Disputed”.

A notification will be sent to the Contract Owner once the review has been acknowledged to confirm the status on the Review Results tab on the Performance Contract.

6.0 Contract Results

At the end of the contract cycle the final contract results can be calculated before the contract is closed for the period. All information on the contract result screen is view only expect for the weights.

To access the Performance Contract Results as a **Manager**:

Open	**Self Service**
Navigate to	**Performance**
Select	**Contracts**
Select	**Specific Performance Contract (Edit or View)**
Select	**Contract Results Tab**

To access the Performance Contract Results as a **HR user**:

Open	**People Online**
Navigate to	**Performance**
Select	**Contracts**
Select	**Specific Performance Contract (Edit or View)**
Select	**Contract Results Tab**

Example: Organisation has a performance contract period which runs concurrent with their financial year and bonusses are paid according to yearly performance results.

Performance Contract cycle: 1 Oct – 30 Sep

Within the year they have 4 Performance Reviews:

1. Quarter 1 review (1 Oct – 31 Dec): 10%
2. Mid-Year review (1 Jan – 31 Mar): 30%
3. Quarter 3 review (1 Apr – 30 Jun): 10%
4. Annual review (1 Jul – 30 Sep): 40%

At the end of the performance contract the results of all 4 reviews must be calculated together as per the individual weights allocated to get an overall performance contract result for the bonus calculation. The Contract Results screen will address this requirement.

6.1 Review Weights

The weights for each review are indicated on the review during the review creation, the option to “Can Edit Weights” is also displayed during the review creation. This is to allow HR to fix the weight percentages for specific reviews, however if the option is selected the

Contract Owner will have the ability to edit the weights of the reviews on the Contract Result screen.

If the “Can Edit Weights” option was not selected, and the weights do require changing, HR will always have the ability to edit the weights regardless of the selection made.

To edit the weight, select the “Edit”  icon in the relevant review line.



6.2 Contract Result Screen

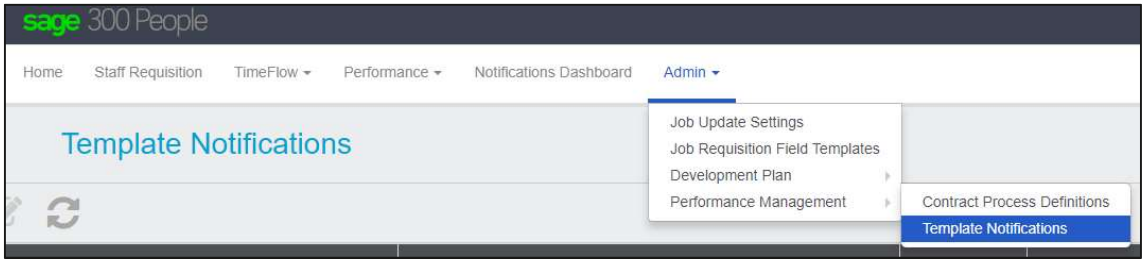
The contract result screen layout:

Field Name	Description
Review Name	Indicate the name of the reviews linked on this Performance Contract.
Review Cycle Start	Indicate the specific review cycle start date.
Review Cycle End	Indicate the specific review cycle end date.
Review Status	Indicate the status of the review, only reviews with the following statuses will be displayed on the Contract Results: • Captured • Awaiting Acknowledgement • Acknowledged • Disputed
Overall Review Total	Indicate the specific reviews final overall result.
Review Weight	Indicate the current weight % allocated to the review, depending on the review setup the Contract Owner will have the ability to change the weight. HR will always be able to edit the weight of a review on People Online.
Review Contract Total	Calculated review total based on the weight % for the specific review.
Contract Total	The overall Contract Total based on all the reviews and their weights.
Contract Final Result	The final result on the Overall Rating Scale.

7.0 Notifications

On People Online:

Expand	**Admin**
Select	**Performance Management**
Click	**Template Notification**

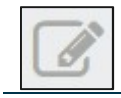


Several standard notification has been created on the system, these notifications can be customised by the HR user, if the standard notifications are changed the new changes will default through to all reviews set to use the default notifications.

Review standard Notifications:

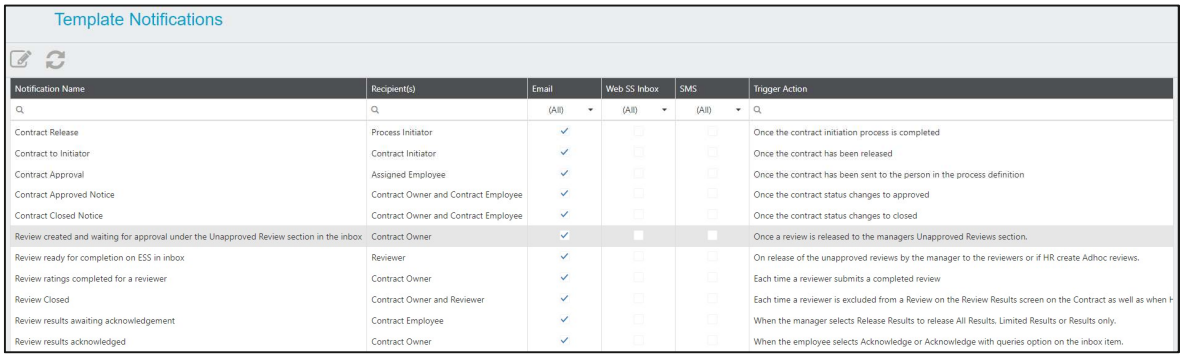
- Reviews waiting to be released
- Performance Review to be completed
- Review captured
- Review Closed
- Acknowledge review results
- Results Acknowledged by Employee

7.1 Action Buttons Available:

Icon	Description	Function
	Edit	Open the selected notification and allow the user to edit the detail.
	Refresh	Refresh the detail in the table.

7.2 Notification screen layout:

Field Name	Description
Notification Name	The name of the specific notification.
Recipient(s)	Indicate who the default recipients of the notification will be.
Email	Indicate whether the notification will be released on email.
Web SS Inbox	Indicate whether the notification will be released on the Web Self Service Inbox.
SMS	Indicate whether the notification will be released on SMS.
Trigger Action	Indicate when the notification will be actioned.



7.3 Edit Notification

Only one notification can be edited at a time. Select the  to view the trigger details when this notification will be actioned.

The notification will open with the following fields to customise:

Field Name	Description
Drag and drop text fields	The available fields which can be dragged in to the subject, header, body and footer of the notification.
Subject	Indicate the subject details of the notification here.
Header	Indicate the header details of the notification here.
Body	Indicate the body detail of the notification here.
Footer	Indicate the footer details of the notification here.

Field Name	Description
Recipients	Indicate who and how the notification needs to be send and received by selecting the relevant boxes, if the notification must NOT be send out all boxes must be unticked. • Notify Affected Employee • Notify Contract Owner • Notify Contract Employee • Send Email • Send to Web SS Inbox • Send SMS (SMS bundles required)

