

E-Appraisal System

Appraisal System Guidelines

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<u>1</u> <u>New to the system</u>

Once logged in to e-Appraisal system you will be navigated to the 'Me' tab.

Me Action	5		Settings
	Appraisee To	est	View notifications (2)
	Name	Appraisee Test	
	Department / Institute / School	HUMAN RESOURCES	
Change	Job titles	TEST APPRAISEE	

If you are new to the system, go to the My Appraisals section at the bottom of the page to view who your appraiser is. If it is incorrect please click the "click here" link.

O My Appraisals		
Welcome to Appraisal This section allows you to complete your appraisal forms and track the progress of these forms with your appraiser	The appraisal area is ready for you to start using. Your appraiser is Appraiser Test. If this information is incorrect, please <u>click here</u> .	Enter Review

This will open up a Support window and you can update the box accordingly with the correct details. Once complete please click the "Submit" button and an email will be sent to the HR Systems Team.

Assuming the details are correct, please click on the "Enter Review" button to generate the Appraisal Form.

O My Appraisals		
Welcome to Appraisal This section allows you to complete your appraisal forms and track the progress of these forms with your appraiser	The appraisal area is ready for you to start using. Your appraiser is Admin User. If this information is incorrect, please <u>click here</u> .	Enter Review

The screen will change to the following format. Click on the Appraisal Form link.

If you have used the system previously you will be taken straight to the Appraisal form options as below.

My Appraisals				
Appraisal Title	Completion Deadline	Appraisers	Status	Next Step
Appraisal 2022	30/11/2022	Louise Reviewer Test	Not Started	Start Appraisal
				View previous Appraisals

Finalisation open from: -	Completion deadlin 30/11/2022	ne: Status: Not Started	
O Appraisers			
1. Louise Reviewer Test (default)			
Appraiser History			
Add			
8 Share		🥝 Save And Close	
You have not yet shared this Appraisal.		Your changes won't be shared when leaving the Appraisal.	
After answering one question, a button will a answers with other participants.	ppear allowing you to share	Save And Close	

You may now complete the Appraisal Form.

Move or scroll down to the next section of the web page and there are six tabs available. The first tab is titled "Introduction" and will display the Appraisal Process Summary wheel with some brief guidelines underneath the wheel of how to complete the form.

Appraisal is a continuing dialogue that takes place throughout the year, with the content summarised and recorded in a formal annual appraisal meeting. At the meeting you will review the past contribution with an eye on the future.

"Objectives" tab

Looking Back

Include previously agreed objectives and other significant pieces of work carried out	Link to strategy	Reflections and summary
Appraisee to complete	Appraisee to complete	Appraisee to complete
0 words		0 words
	Add	
Appraiser summary		View History
Appraiser(s) to complete		
		0 words

Include previously agreed objectives and other significant pieces of work carried out	Link to strategy	Reflections and summary
Appraisee to complete	Appraisee to complete	Appraisee to complete
0 mm/r		0t
0 words		0 words
	Add	
Appraiser summary		View History
Appraiser(s) to complete		
		0 words

This section is for reviewing objectives. If you finalised your last appraisal, some sections will be prepopulated.

*** Please note if your previous year's appraisal form was archived you will need to copy and paste the looking ahead data into your looking back section on your current form.

Looking forward

This section is for setting this year's objectives.

Appraisee proposed objectives for discussion

Record as much information as needed to make the outcome clear	Link to strategy
Appraisee to complete	Appraisee to complete
0 words	
	dd
Appraisee summary	View History
Appraisee to complete	
	0 words

For further help please go to <u>https://hr.qmul.ac.uk/procedures/appraisal/</u> for guides on completing your appraisal form.

Enter your Work Objectives and Link to Strategy, Comment and Agreed Summary boxes. The boxes are free text fields.

To add further Work Objectives, please click the "Add objective" under the boxes

Appraisee proposed objectives for discussion

Record as much information as needed to make the outcome clear	Link to strategy	
Appraisee to complete	Appraisee to complete	
0 words		
Add		

"Citizenship" tab

Enter your information in the "Looking back" and "Looking Forward Boxes.

Activity/Behaviour	View History
Appraisee to complete	
Comment (Describe what impact/specific contribution you have had? How can you evidence this?)	View History
Appraisee to complete	
	0 words
Add	U WOLUS
Looking Forward	
Activity/Behaviour	
Appraisee to complete	3
	0 words
Add	

To add further Activity/Behaviour, please click the "Add Activity/Behaviour" under the boxes

"Support and Enagagement" tab

This section is to agree actions between you and your appraiser.

Hyperlinks are provided to help you if required.

"Career and Development" tab

Looking back

Guidance notes can be accessed via the hyperlink

Development Objective	Progress Review
Appraisee to complete	Appraisee to complete
0 words	0 words
Ad	id

To add Objectives, please click the "Add Activity/Behaviour" under the boxes

Looking forward

This section is for you and your manager to explore your aspirations, how you'd like to progress in your role, and what you need to do to achieve your objectives.

Career and Personal ambition.	View History
Appraisee to complete	
	1
	0 words
Any additional suggestions for progression	View History
Appraiser(s) to complete	
	0 words

To add Looking forward development objectives, please click the "Add Looking forward development objectives" under the boxes

Your Development Objective	What development activities would help?	Category^ (Please select from drop down below)
Appraisee to complete	Appraisee to complete	Appraisee to complete
0 words	0 words	
\langle	Add	>

"Summary" tab

The Appraisee box is for Appraisee is only editable by the Appraisee and cannot be edited by the Appraiser. Similarly, the Appraiser box can only be edited by the Appraiser and not the Appraisee.

Appraisee

This section is only editable by the Appraisee. The text will be visible to the Appraiser once the form has been shared.

Consider any common themes across your objectives, feedback you've had, your strength, any learning, what you need to focus on in the coming year.	View History
Appraisee to complete	
	0 words
Appraiser	
This section is only editable by the Appraiser. The text will be visible to the Appraisee once the form has been shared.	
Consider any comments themes across the objectives e.g. strengths, learning, aspects, the appraisee needs to focus on in the coming year.	View History
Appraiser(s) to complete	

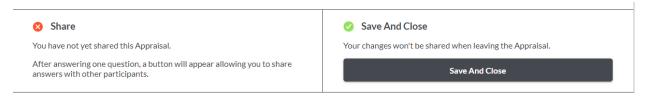
To save the form at any time click the "Save" or "Save and Close" icon at the top of the Appraisal form. This will Save the form and you can return to the Me page. This option will save the form in <u>DRAFT</u> format only.

Share	Save And Close
You have not yet shared this Appraisal.	Your changes won't be shared when leaving the Appraisal.
After answering one question, a button will appear allowing you to share answers with other participants.	Save And Close

0 words

2 Share and close the Form

Upon completion of the form click "Share" at the top the page. This will create a notification to your Appraiser and enable them to view <u>all</u> form content.



<u>3</u> <u>Finalising the Appraisal Form</u>

Either the Appraisee or the Appraiser can initiate the Finalisation process.

In this example the Appraiser has sent a Finalise action to the Appraisee. If you as the Appraisee agree with the final content you may click the Approve button. Only click Approve if you are in agreement with the final content, as the form will lock from further editing.

Finalisation Once you have ticked this box you will not be able to make any further changes to this review. Other users on this review will be notified that you wish to finalise it. This Appraisal will complete automatically once all parties have submitted for finalisation. View History	 APPRAISEE TEST - I agree to the finalisation of this appraisal Louise Reviewer Test - I agree to the finalisation of this appraisal

On finalisation, the appraisal form will move into the finalised appraisal section on the "Me" page.

L My Appraisals					
Appraisal Title	Completion Deadline	Appraisers	Status	Next Step	Actions
No active Appraisals to display.				<u>View pre</u>	vious Appraisals

4 <u>Print Friendly PDF</u>

_

	✓ Options, Attachments (1), & Printable PDF		
<	Generate Printable PDF	View & Manage Attachments 🔳	Keyboard Shortcuts

5 Add attachment

This will be useful for Appraisers whose staff do not have access to PC's/Laptops.

Click on Add Attachment, then click Choose File to select a file, then click Upload, allow the File to upload.

V Options, Attachments (1), & P	rintable PDF	ttachments 1	Keyboard Shortcut	ts
				x
Any files added to the	Appraisal will be shared w	rith all participants in	nmediately.	
File Choose File No file	chosen			
	Close		Upload	

Once the File has Uploaded then click upload to close the screen

From the apprasial form screen the Add Attachment link has changed to the following where you can then click into the View/Edit to see the attachment that you saved.

✓ Options, Attachments, & Prin	table PDF			
Generate Printable PDF	Add Attachment	View & Manage Attachments	Keyboard Shortcuts	>

<u>6</u> <u>Notes</u>

At the bottom of the Me tab, there is a Notes section where you may record feedback relating to your work. My Notes.

				😵 My Notes
Add note	Shared	Created By	Date Added	Note Title Dat
	-			You have no notes.
a	View			

Click Create new Note to record your feedback. You can also tick the Share With tick box to share your feedback with your Appraiser.

Click Save when finished

🤣 New note				×
Note title				
Description *	B Z U ⊟ ∰ ∰ ∰ ♥ № ∞ 炎 ┉ X 🗈 ใ 🕼			
	his note is currently private. Select users in the list below if yo	euwich to choro		
Share with:				
Add attachments Filename		Size	Chabura	
Fliename		Size	Status	*
	Drag files here.			
+ Add files 🕈 Start	upload	0 b	0%	Ť
	upload g gif png txt doc docx xls xlsx pdf ppt pps odt ods odp xps mht .	0 b	0%	*
		0 Ь	0%	ave

Please note that both the Appraisee and the Appraiser can share notes in this section, both being able to share the note with each other.

7 New Form Generation

After finalising your current appraisal, the new form will automatically appear for next year.

Include previously agreed objectives and other significant pieces of work carried out	Link to strategy	Reflections and summary
Appraisee to complete	Appraisee to complete	Appraisee to complete
0 words		0 words
	Add	
Appraiser summary		View History
Appraiser(s) to complete		
		0 words

Your looking forward data will transfer to the looking back section on your objectives tab.

Appraiser Process

<u>1</u> My Team

As an Appraiser the screens you access are the same as an Appraisee, with the exception of having an extra Tab on your profile called My Team.

From the My Team tab you can select the Appraisees you are responsible for Appraising.

When an Appraisee updates their Appraisal Form you will receive Actions and/or Notifications from them. These Actions will be displayed on the Me tab or on the Appraisal Form itself.

You can also click on the Action tab in green or you can go to the My Team tab and select the Appraisee from there to view the Appraisal Form.

Ме Му Те	am Actions		<u>Reports</u> <u>Settings</u>
Appraiser Test			<u>View notifications (1)</u>
	Name	Appraiser Test	
	Department / Institute / School	HUMAN RESOURCES	
Change	Job titles	TEST APPRAISER	

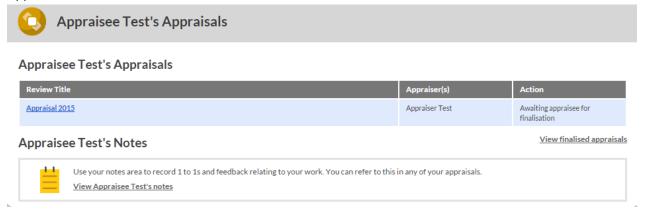
To view an Appraisal Form for your Appraisee click on the My Team tab.

Me My Team Actions <u>Reports</u> <u>Settings</u>					
Appraiser Test			<u>View notifications (1)</u>		
	Name	Appraiser Test			
-	Department / Institute / School	HUMAN RESOURCES			
Change	Job titles	TEST APPRAISER			

Then select an Appraisee, you can view their appraisal form or their profile.

y Team						
> Filte	ers					
		н	◄ ►	M		
Name	Job Role	<u>Department/institute/school</u> ↓ ^a	Appraisal	<u>Appraisal</u> <u>Status</u>	Next Step	My Actions
Test User1	ADMIN ASSISTANT	MYHRADMIN	Appraisal 2022 test	Started	Share Appraisal	View Profile View Appraisal
		И	•	Н		

The available Appraisal Forms will be displayed in the Appraisals section, please click on the relevant Appraisal Period



Once the Appraisee has updated the content of the Appraisal Form and clicked Share and Close, the Appraiser will receive a Notification requesting the Appraiser view the form.

You will now be able to add content and then Share and Close to enable the Appraisee to view the content you have updated.

Once the Appraisee and the Appraiser have shared and closed the form, this back and forward process may continue until such time that both parties will agree on the final content.

Once agreed the content of the Appraisal Form can be Finalised, click the Finalise option

Finalisation Once you have ticked this box you will not be able to make any further changes to this review. Other users on this review will be notified that you wish to finalise it.	APPRAISEE TEST - I agree to the finalisation of this appraisal		
This Appraisal will complete automatically once all parties have submitted for finalisation.	 Louise Reviewer Test - I agree to the finalisation of this appraisal 		

A Window will appear confirming if you wish to finalise, tick the box to Confirm to send an Action back to the Appraisee.

This returned action by the Appraiser will allow the Finalisation process to be activated and either an Appraisee or an Appraiser can finalise the form.

Once the finalisation process has been initiated by one party, the process will require the other party to Finalise to complete the process.

The Finalisation process should only be completed towards the end of the Appraisal Cycle.