2021

TalentPeak™ CorpAdmin Comprehensive Reference Guide

TalentPeak

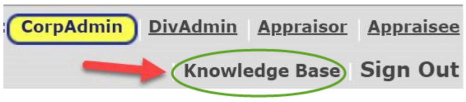
Insights For Performance LLC and

TalentPeak™

1/1/2021

PDF Guide Last Updated: 2019

The Online Searchable Knowledge Base is undergoing migration to new platform & will be relaunched 1st quarter of 2021 – it will be visible to you here by clicking on the "Knowledge Base" Button. *(Currently links to TP website hidden pages)*



The information in the **Primary CORPADMIN COMPREHENSIVE REFERENCE GUIDE** covers the TalentPeak™ core performance management system and **all** additional modules and systems.

To get the hyperlinks in this User Guide to work, you will need **Adobe Reader**
Download it for free from: **www.adobe.com**

For easier navigation, please use the Table of Contents with hyperlinks to navigate to specific topics when questions arrive. The Adobe View pane if enabled will keep the thumbnails open for easier viewing & navigation; and the built in Adobe "search" function, to obtain answers to your questions using key words search, or to quickly get to the desired referenced section.

(In Adobe, at the top left, Click on VIEW>>SHOW/ HIDE >>NAVIGATION PANE>>THUMBNAILS)

Fact Note: TalentPeak™ is written in International English Spelling to enable a globally acceptable format

TalentPeak™ Our Go Green Initiative
We are continuously improving!
Because of this commitment to our users, we undergo frequent system and feature updates.
The benefit is a more efficient TalentPeak™ and richer experience for you.
Our User Guides are in downloadable PDF format and are updated frequently with every new release.
Please save this as a PDF and carefully consider before deciding to print. Thank you!

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Please consider the environment before printing

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TalentPeak

TalentPeak™ No Cost Support Options

Contact Support - https://www.talent-peak.com/support/ (All Users)

TP Support Webpages

TalentPeak™ Primary CorpAdmin Role - https://www.talent-peak.com/hr-corp-admin/

TalentPeak™ Division Admin/Manager – Appraisor Role - https://www.talent-peak.com/appraisor/

TalentPeak™ Appraisee Role – https://www.talent-peak.com/appraisee/

Phone Support – Client assigned TalentPeak consultant for phone – 1-866-900-5172 (IFP#)

Email & Webinar Support (Primary Corp Admin & Designated System Admin *only*)

All Other Users Chat, Ticket & Email Support – talentpeaksupport@talent-peak.com or
from support webpages above that are linked to chat & email

Table of Contents

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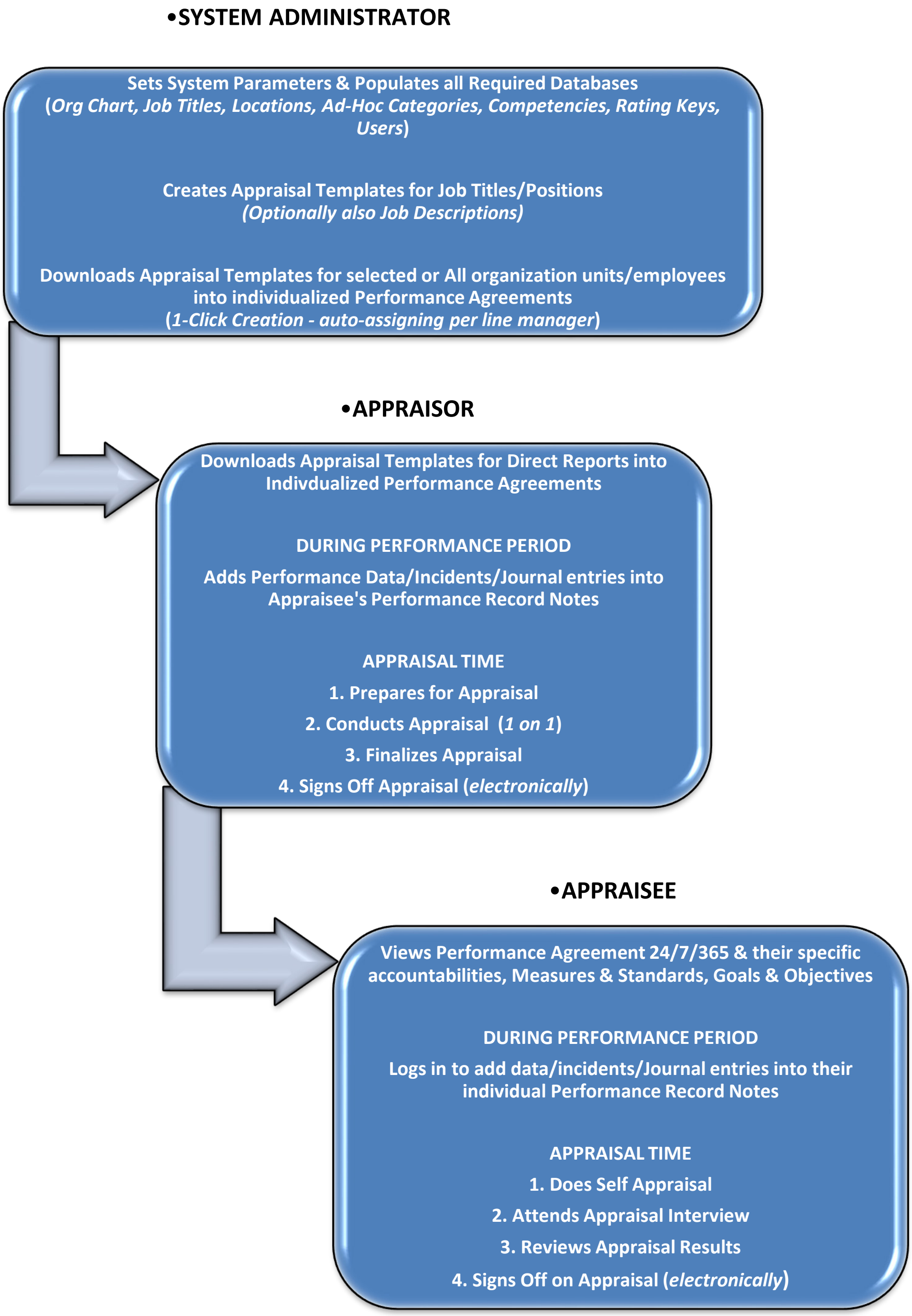
TALENTPEAK SYSTEM OVERVIEW

System Diagram

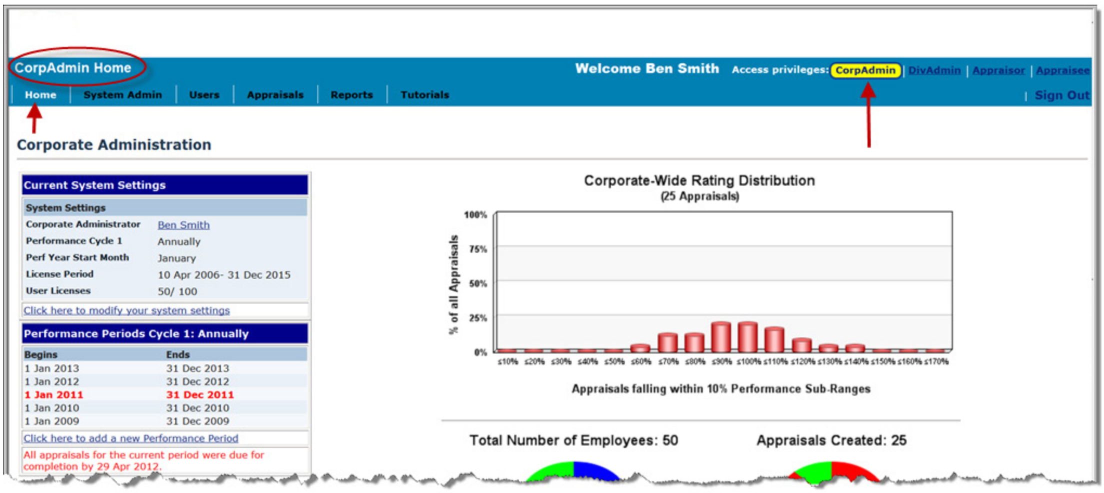
Below are three different system privilege levels and their respective roles.
1. System Administrator (CorpAdmin)
2. Appraisor
3. Appraisee



System Roles

Log In to TalentPeak™ with the information provided you from your advisor, or assigned consultant. You will need your ORG CODE, USER NAME & PASSWORD provided to you in an email with the site set up instructions.

To begin, Click on the **CorpAdmin** role link (it will be highlighted in yellow).



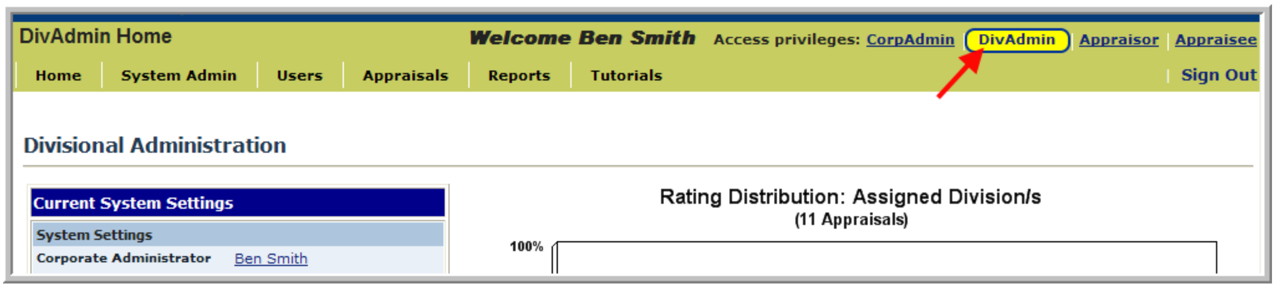
The system accommodates FIVE different roles:

- CorpAdmin
- UserAdmin
- DivAdmin
- Appraisor
- Appraisee

These roles are activated in each person's User File: See "System Access Privileges" in this Section

NOTE: Employees (at all levels) are called USERS in the system.

Each of the five roles can be accessed instantly by clicking on the **role links** in the top right-hand corner of your screen. The active one is highlighted in yellow (see **DivAdmin** below).



Let's look at these roles briefly:

TalentPeak™ Roles Defined

Corporate Administrator (CorpAdmin)	Sets up and manages the system for the organisation. Adds and edits the User Files of employees (users). Monitors the status of appraisals of all employees in the entire organisation (and "chases them down" if necessary). Can view all appraisal forms of everybody for training, coaching and quality moderation purposes. Can also run a variety of reports based on the performance of organisation-wide units and employees. There can only be one "primary" CorpAdmin for the organisation, but additional "secondary" CorpAdmins can also be assigned, e.g. you may also want to give your President/CEO (others?) secondary CorpAdmin status so that they can also view the appraisals of all employees in the organisation. Secondary CorpAdmins have all primary CorpAdmin access rights, except that they are not able to access the System Settings or Performance Periods pages (these, being very sensitive system pages, are strictly reserved for access by the primary CorpAdmin only). The primary CorpAdmin is selected in System Settings, and can be changed to a different person at any time (only the current primary CorpAdmin can select a new one).
Divisional Administrator (DivAdmin)	Views and monitors the status of appraisals of everybody in their assigned Divisions (or departments/regions/locations) and "chases them down" if necessary. Adds and edits the User Files of employees in these units. Can view all appraisal forms of everybody in their assigned units for training, coaching and quality moderation purposes. Can also run a variety of reports based on the performance of division-wide units and employees. DivAdmins assist the CorpAdmin in the above tasks, thereby ensuring that everything does not fall on the shoulders of the CorpAdmin. NOTE: The assigning of DivAdmins is not compulsory, but useful for larger and geographically widespread organisations, e.g. with offices in different countries, continents or time zones (where a local DivAdmin has more convenient access to employees during normal working hours). Any number of DivAdmins can be "assigned" in the system. NOTE: You can also assign the DivAdmin role to Divisional Directors, so they can see all the appraisals (and run reports) of their divisions.
User Admin (UserAdmin)	A User Administrator or System Administrator Assistant can be enabled to be provided with access to the system pages for maintaining User Files, or to assist with Appraisal Templates and Job Description setup/admin tasks.
Appraisor	Appraisors are line and project managers who are required to conduct Performance Appraisals/Reviews with Appraisees (normally direct reports/"subordinates"). Appraisors complete the appraisals of their direct reports, using the system, and monitor the status of their appraisals.
Appraisee	Everybody in the organisation is an Appraisee (by default). In this role, Appraisees can access their own Appraisal Forms.

Reference the System Admin User Setting in this Section of this Guide, Designating the Corp Admin & User Admin Settings.

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TALENTPEAK™ PERFORMANCE REVIEW PROCESS OVERVIEW

TalentPeak™ has **four key** forms used in the review process that you may not be familiar with and they are:

1. The employee agreement or **Agreement** form
2. The Appraisal Preparation Form or **Prep** form for short
3. The **Official Appraisal Form**
4. The Summary Performance Optimization Plan or **Summary POP**

TalentPeak™ Review Process and Role Each Form Plays

Step 1 The manager finalizes the employee's Agreement – Defined Below (What is expected and how he or she will be evaluated)
Step 2 The manager and employee each complete a separate draft appraisal in preparation for their face to face review meeting – Prep Forms – defined below
Step 3 Following the Face to Face review meeting the appraisor makes any necessary edits to the manager's Prep Form and with a single click transfers the contents of the updated appraisor prep form to the Official Appraisal Form
Step 4 Appraisor reviews and makes final edits to the **Official Appraisal Form** and with a single click transforms the entire contents of the **Official Appraisal Form** to the **Summary and Performance Optimization Plan Sign Off Form**

1. Agreement Definition

Definition:
The Agreement is the foundational document to the appraisal form. The Agreement document describes what is expected of the employee and how their performance will be measured.

Edits To The Agreement:
Changes to the agreement are automatically updated to the employee's appraisal forms (*Appraisal Prep Form and the Official Appraisal Form*). Edits to the Agreement form are permission based and controlled by the CorpAdmin. The editing permissions and restrictions range from being totally locked to partially locked or totally open for creation and editing by the appraisor. Managers and Division Administrators may be given editing permission for their employee's Agreements by the CorpAdmin.

Other Settings within the Agreement:
The Agreement is a foundational document because it is a platform for the following appraisal management actions:

- Change the review date from the one assigned by the system based on the default performance cycle settings
- Invite multi-raters to provide feedback on an employee's performance
- View the employee's previous review
- Add any special notes pertaining to this review
- Add or edit performance competencies, goals, objectives etc. if permission has been granted by the CorpAdmin.
- Release the agreement to the employee for editing their goals and objectives
- Remove employee's ability to edit the agreement
- Edit performance measure weightings if weightings have been turned on in system settings by the CorpAdmin
- Rearrange the order of performance measures as they appear in the appraisal form if not locked by the CorpAdmin
- Assign a different rating scale from the rating scale library if not locked by the CorpAdmin
- Customize the rating scale for a specific performance measure if not locked by the CorpAdmin

2. Appraisal Prep Form

Definition:
The Prep form or preparation form is the document used in preparation for the **employee/manager face to face meeting**. The Prep Form is typically used as a dynamic document for updating and recording performance throughout the year and not just at review time. So it stands to reason that there are two types of Prep Forms:

1. An **appraisee prep form or appraisee self-assessment throughout the year**, and
2. An **appraisor's prep form – the manager's assessment of the employee's performance** throughout the year

Appraisor and Appraisee Prep Form Functionality

The **Appraisor Prep Form's Embedded Links and Functions** provide a powerful easy to use tool for viewing and editing performance related information with a single click.

Appraisor's Prep Form Finger Tip Functionality:
- Displays the appraisee's **Agreement**
- Display/hide appraisee's and appraisor's **color coded** performance **record notes** under the appropriate performance measures
- View the appraisee's **previous appraisal**
- View the appraisee's **Prep Form or self-assessment** once the appraisee has released it to his or her Appraisor – see appraisee's **color coded** comments and self-rating
- View or hide the **multi-rater's color coded feedback** displayed under the appropriate performance measures
- **Print** the Prep Form
- **Convert the Prep Form** to other formats Word, PDF, Image
- View a **scaled down version** for printing
- Release the Appraisor's Prep Form to the Appraisor's **Manager or HR for approval prior** to the Review Meeting *(Appears only if part of the approval process)*
- **Transfer all comments and ratings to the Official Appraisal Form** following the face to face employee/manager meeting

Appraisee's Prep Form Finger Tip Functionality:

- View the appraisee's **Agreement**
- Display/hide appraisee's and appraisor's **color coded** performance **record notes** under the appropriate performance measures
- View the appraisee's **previous appraisal**
- Release the appraisee's **Prep Form or self-assessment** to his or her Appraisor
- **Print** the Prep Form
- **Convert the Prep Form** to other formats Word, PDF, Image.
- View a **scaled down version** for printing
- **Upload two related documents as attachments to the Prep Form**

3. Official Appraisal Form

Appraisor's Official Appraisal Form Finger Tip Functionality:
- Displays the appraisee's **Agreement**
- Display/hide appraisee's and appraisor's **color coded** performance **record notes** under the appropriate performance measures
- View the appraisee's **previous appraisal**
- View the appraisee's **Prep Form or self-assessment** once the appraisee has released it to his or her Appraisor – see appraisee's **color coded** comments and self-rating
- View or hide the **multi-rater's color coded feedback** displayed under the appropriate performance measures
- **Print** the Prep Form
- **Convert the Prep Form** to other formats Word, PDF, Image
- View a **scaled down version** for printing
- Release the Appraisor's Official Form to the Appraisor's **Manager or HR for approval prior** to the **signature process** *(only if part of the approval process)*
- Upload two attachments (Word, Excel, PDF, Email) such as scorecards etc.
- **Transfer scores** to the **Summary and Performance Optimization Plan** Form (***POP Form*** *- See definition below*)

4. Summary and Performance Optimization Plan (Summary POP)

The Appraisal Summary and Performance Optimization Plan (POP) Finger Tip Functionality:

- Appraisor **e-signature page** with time stamp
- Appraisor can un-sign the Summary Form by clicking on their signature *(prior to e-signature by others in the approval process)*
- Appraisor adds viewable summary comments above signature
- Appraisor views, edits confidential comments section viewable only to Higher Level Manager and HR
- The Summary displays scores, by measure with an **Overall Performance Score with bar graph**
- Provides **Performance Optimization Plan** including Training and Coaching Suggestions extracted from the appraisor, appraisee, and multi-rater feedback in the review
- Provides a link to the appraisee's **Personal Development Plan** within the Learning Management Module *(only if Learning Management is activated)*
- Link back to the Official Appraisal Form

TALENTPEAK™ DEFINITIONS

Definitions of Form Links

Job Description (if this feature is activated & has been released by CorpAdmin): Clicking this link shows the viewable version of the Appraisee's Job Description

Agreement: Opens the **Performance Agreement** to view or edit

Perf Record: Opens the page where Appraisor or Appraisee can View or Add **Performance Record Notes** to document good or poor work performance or behaviour throughout the performance period.

Appraisor Prep: Takes you to the **Appraisor Preparation (Draft) Form**. The Appraisor's PREP form cannot be viewed by the Appraisee, or anyone else; unless the feature to "allow its release" is activated in System Settings. (Appraisees have their own PREP Form, also called "Self-Appraisal").

Appraisal: Takes you to the **Official Appraisal Form** of the Appraisee (to be completed after the appraisal interview). The contents of the Appraisor Prep Form can be transferred into this form (individual measures, or the entire PREP Form contents in one step - see transfer links on the Appraisor Prep Form).

NOTE: The Official Appraisal Form cannot be viewed by the Appraisee from his/her login until such time as the Appraisor - and Higher Level Manager (HLM) if activated - signs off on the Appraisal (the HLM can e.g. be the Appraisor's boss or the Corp- or DivAdmin)

Summary/POP: Contains the Performance Percentage Calculations (or rating averages), **Performance Optimisation Plans**, and signoff links.

NOTE: The Summary/POP Form also cannot be viewed by the Appraisee from his/her login until such time as the Appraisor (and HLM if activated) signs off on the Appraisal.

Delete: Deletes an appraisal that has not been signed off yet

Other System Abbreviations and Definitions

HLM: Higher Level Manager

Apply Filter: Means to "sort" or "extract" by parameters from the database the on-screen view of report data or user data that you are trying to obtain

Clear Filter: Means to then "Delete" or "remove from view" the data sorted from the previous selected filter/or search parameters so a new search can be conducted. Note: without deleting or clearing the previously conducted search can result in not finding/incorrect/incomplete filtering of desired data or report view.

NRY: Means "not rated yet" (found on reports)

T: Means too early to assess (found on reports)

Appraisals started: Means Appraisor or Appraisee has started making entries on the Appraisal Forms (but nobody has signed off yet) (found on reports)

Appraisals not started yet: Means Appraisal has been created (e.g. Template downloaded), but no entries have yet been made on the Appraisal Forms by either the Appraisor or Appraisee (found on reports)

Perf Prd: Means the selected Performance Period (found on reports)

Yr Cum: Means Year Cumulative Average (relevant with 1-, 2-, 3-, 4-, or 6-monthly Appraisal Cycles) (found on reports)

Goal: Medium to long-term in focus (2 years plus), goals are formulated (starting with an action verb) as specific results/outcomes to attain by a certain date, e.g.: "Achieve 40% market share by Dec 31, 2010".

Objective: Short-term in focus (up to 2 years), Objectives are formulated as with Goals, e.g.: "Implement a new Accounting System by 'x' date". Additional Performance Standards are normally added to guide and measure jobholder performance. Objectives should be **SMART: S**pecific, **M**easurable, **A**ction-oriented, **R**esults-focused, **T**ime-bound.

KPI: Key Performance Indicators are OUTPUT MEASURES such as: Sales, Customer Satisfaction, Avg $ Value per Transaction, Staff Retention, ROI, Market Share, etc.

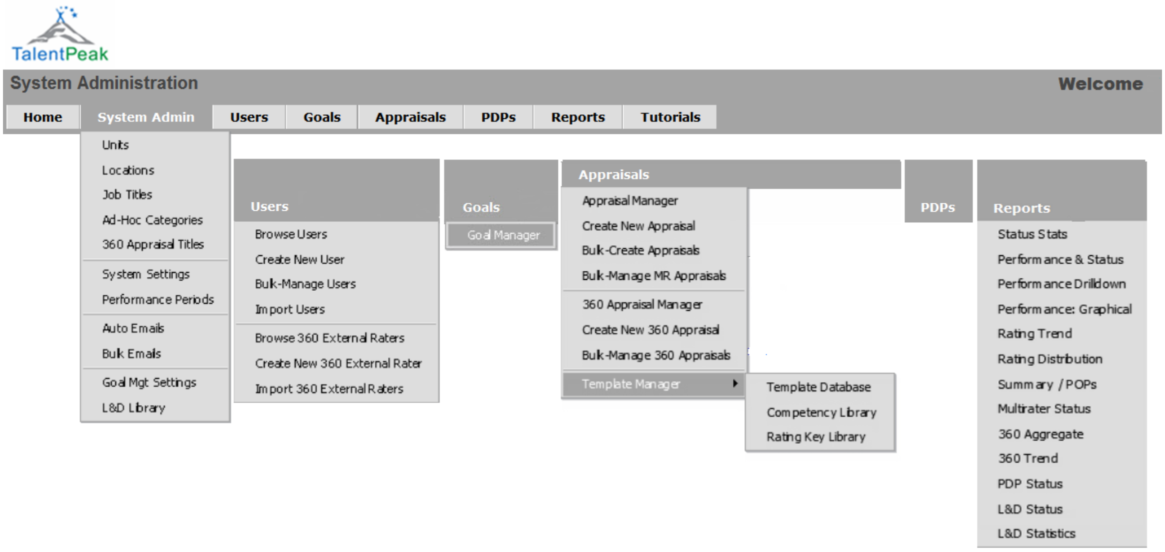
Competency: Job-critical skills, knowledge, abilities, characteristics, attributes, and attitudes that combine to produce outstanding performance in a specific position. Examples of Competencies are: Interpersonal Skills, Leadership, Teamwork, Accuracy, Creativity, Customer Focus, Integrity, Selling Skills, etc.

Whereas Goals, Objectives, and KPIs have Performance Standards; Competencies and Values have Behavioral Indicators (these are prime behavior examples describing the Competency)

T-Lock: Means to Lock or unlock the template toggle

CORPADMIN REFERENCE GUIDE NAVIGATIONAL OVERVIEW

Navigational Guide Diagram

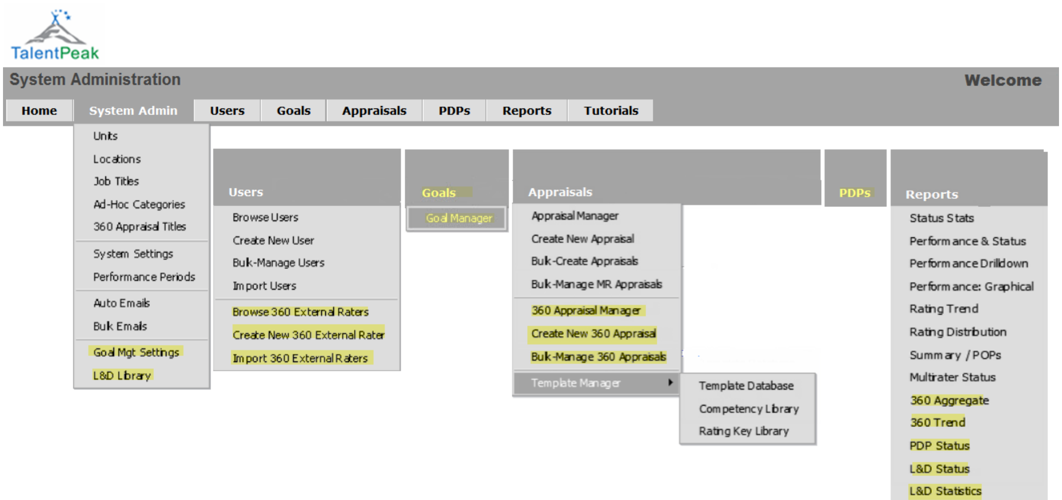


Instructions and Summary of Use

The first section of this comprehensive reference guide provides the CorpAdmin with detailed overview of what each navigational link or system setting means. This guide also includes **all** additional add-on system and module information for **CorpAdmins** contained in one central Reference Guide. (*Please refer to separate Guides for Appraisors & Apraisees for additional information.*)

The first section "System Admin" will review each of the settings needed (as seen above in the diagram) to set up your system; and should serve as a reference tool for when other features are enabled or when questions arise. Please use the Adobe Table of Contents with hyperlinks to navigate to specific topics or chapters for guided information. When questions arrive, using the built in Adobe "search" function, will help you to quickly obtain answers using a key word search function.

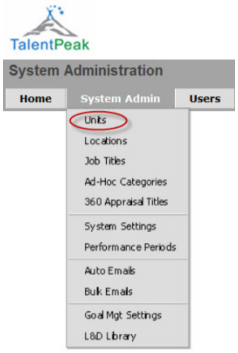
For initially using this guide, the suggested method would be to login to TalentPeak™ in your CorpAdmin role, and with this PDF open; follow this guide page by page to become familiar with each of the settings, views, and options. In the "navigation" you may see that you do not have visible some of the tabs as shown here in the guide (*see highlighted links in yellow below that are settings for optional modules*). Please refer to this guide to familiarize you with these options, and then skip to the next page of instructions. If you have any difficulties or find missing information from this guide, please don't hesitate to contact customerservice@insightsforperformance.com.



(Navigation links highlighted in above diagram in yellow refer to optional systems & may not be viewable in your organization's site)

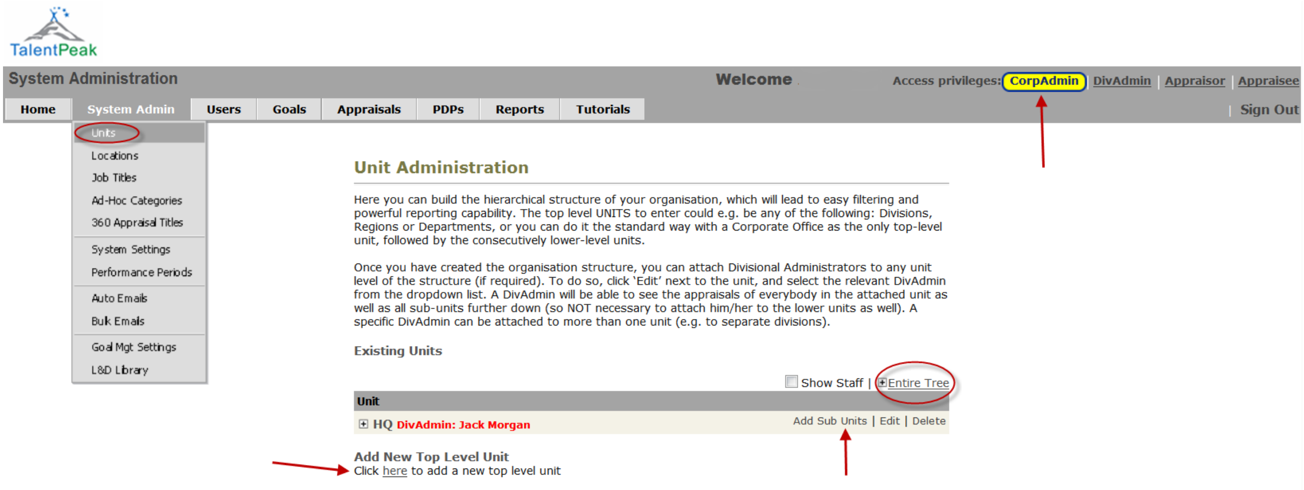
SYSTEM ADMINISTRATION

(Before proceeding, ensure that you are in the correct role as **CorpAdmin;** it will be highlighted in yellow.)



System Admin >> Units

Under System Admin, Select **Units**. On this page you set up the hierarchical structure (organisation chart) of your organisation. To begin, you will be adding your "Top Level Units" first.



Top Level Unit Definition Unit Administration Page

A top level unit (indicated in BLUE below) could e.g. be any of the following: Head or Corporate Office, Divisions, Regions, Departments, or Branches. Consider carefully how you want to set the system up.

If the organization is small (typically up to 100 employees), then enter one top level unit only (e.g. "HO" or "Corporate"), followed by the Divisions, Regions, Departments, or Branches on the next level. The result may look as follows:

HO / Corporate		
Marketing, Accounting, HR, Logistics	Branch A	Branch B

With larger organizations you may wish to add the Divisions as top-level units, and add a unit called "Executive" to which you can attach the company President or CEO. In this case the result may look as follows (large Corporate Office):

Executive	**Marketing**	**Accounting**	**HR**	**Operations**
(President/CEO)	Advertising, PR	Acc Rec, Acc Pay	Payr, Recr, Traing, Adm	Branches A to Z

Below is another possible variation (small Corporate Office):

Corporate	**Operations**	
Marketing, Accounting, HR	Warehousing	Branches A - Z

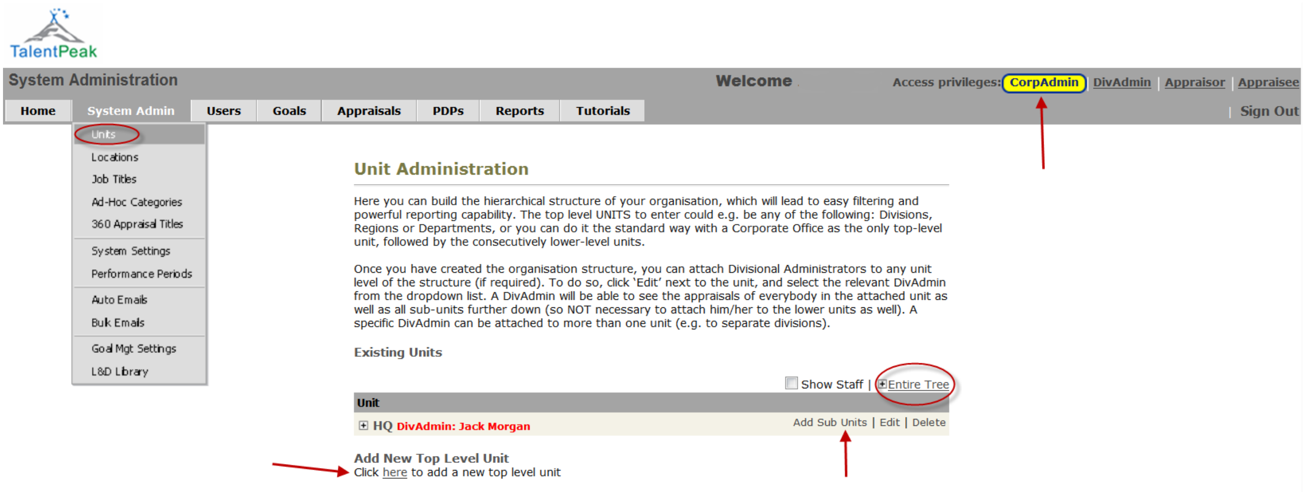
As mentioned previously, in this role you will be responsible for setting up and maintaining the system for your organisation.

FAQ: Is it compulsory to add the organization hierarchical structure?

ANSWER: No, but through the organization structure (and by "attaching" employees to their relevant units), the system links everybody together.

Other benefits of having the organization structure in place:

- Enables you to search for (filter) users and their appraisals according to units or sub-units.
- DivAdmins can be attached to top-level units (the use of DivAdmins, a hugely beneficial feature of the AS System, would become obsolete without an organization hierarchical structure been set up).
- Enables line managers to view the appraisal forms/docs of their "indirect" reports as well, i.e. those two levels and further down (in addition to their direct reports).
- Enables reporting of appraisal results (Reports Filter) by unit or sub-unit.
- Enables the bulk-creation of appraisals



On this page you set up the hierarchical structure (organisation chart) of your organisation.

Step 1: Click on "Click here to Add New Top Level Unit", and then add all your organisation's top level units in the field provided. Such "top level" units would normally be the different divisions of the organisation, but could also be regions or branches, etc. - whatever will be suitable in order to see the various major units of your organisation best and make them easily manageable within the system. Add a top-level unit "Executive" for your CEO/President and his/her PA (see FAQ 1 above for examples of unit setups).

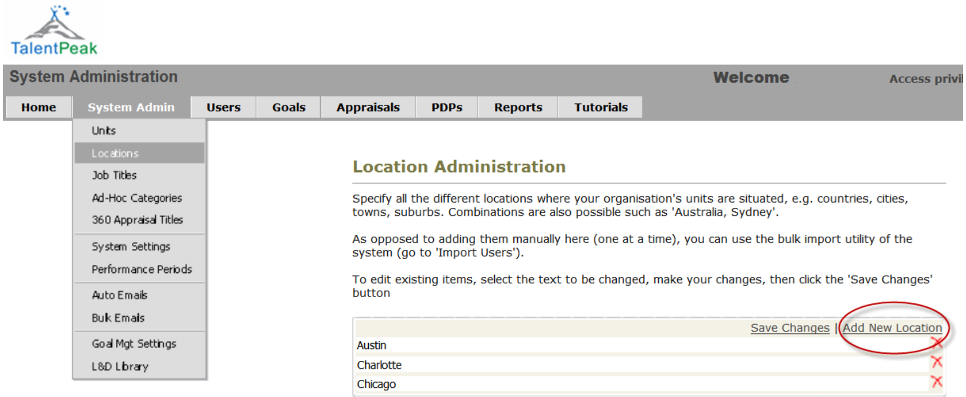
Step 2: Click "Add Sub Units" to add consecutively lower unit levels. The system accommodates up to 10 vertical levels.

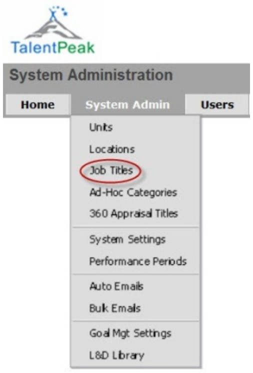
(NOTE: Your TalentPeak™ Advisor/Consultant will review these settings with you in your orientation webinar.)

Sample Hierarchical Structure

System Admin >> Locations

Please follow the instructions provided on this TalentPeak™ Locations page, see sample below:

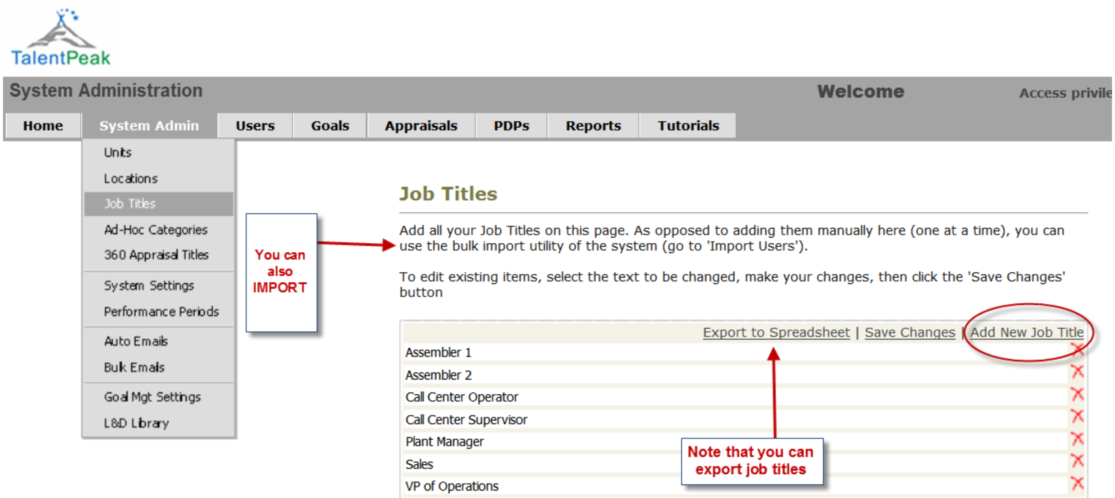


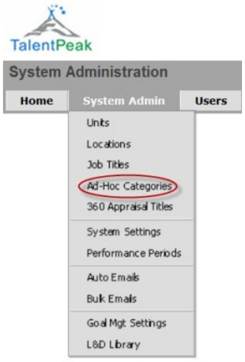


System Admin >> Job Titles

Please follow the instructions provided on this TalentPeak™ page, see sample below:

IMPORTANT: Abbreviate Job Titles longer than three words so they can show fully in system dropdown filters. MAXIMUM 18 characters including spaces.





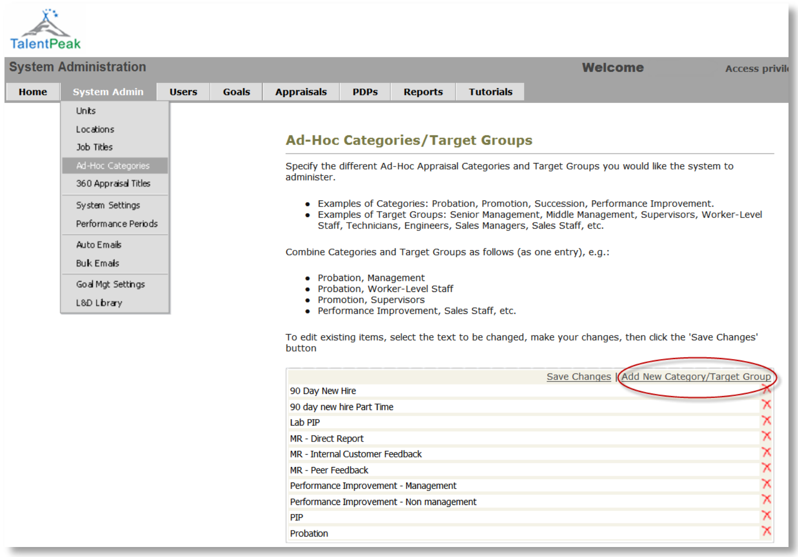
System Admin >> Ad-Hoc Categories

Ad-Hoc Appraisals

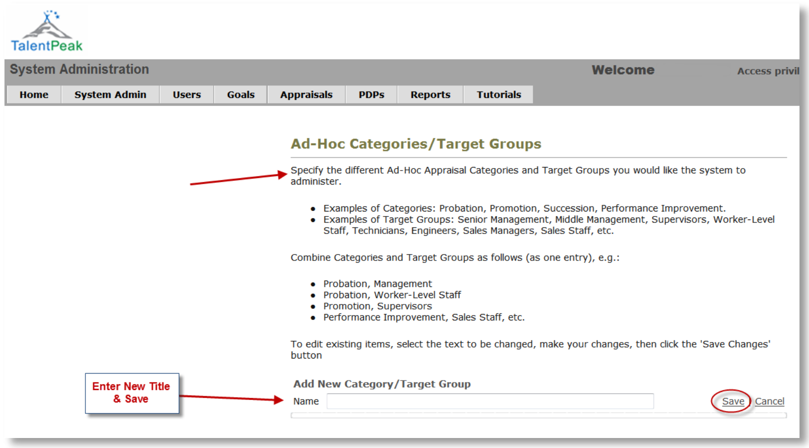
- Employee Appraisals that can be done at any time ("outside" the regular cycle) as and when required (e.g. for Probation, Promotion, Succession, Performance Improvement, etc.).
- Any number and type of Ad-Hoc Appraisals can be done per individual employee per Performance Period.
- Every Ad-Hoc Appraisal is "unique" or "standalone" in that there is no "carry-over" or "connection" between them or with Regular Appraisals in any way.

Add your relevant Ad-Hoc Appraisal Titles on this page. *(Ad-Hoc Titles need to be created prior to adding an Ad-Hoc Appraisal template in the system):*

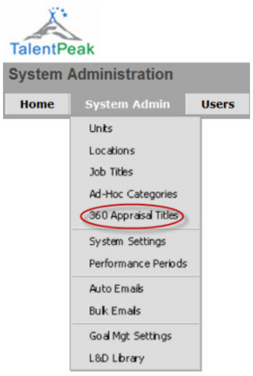
Step 1:



Step 2:



Consult the separate Ad-Hoc Appraisal User Guide, or section in APPRAISORS User Guide & for use. ([Refer to Ad-HOC Appraisals in Knowledgebase)]

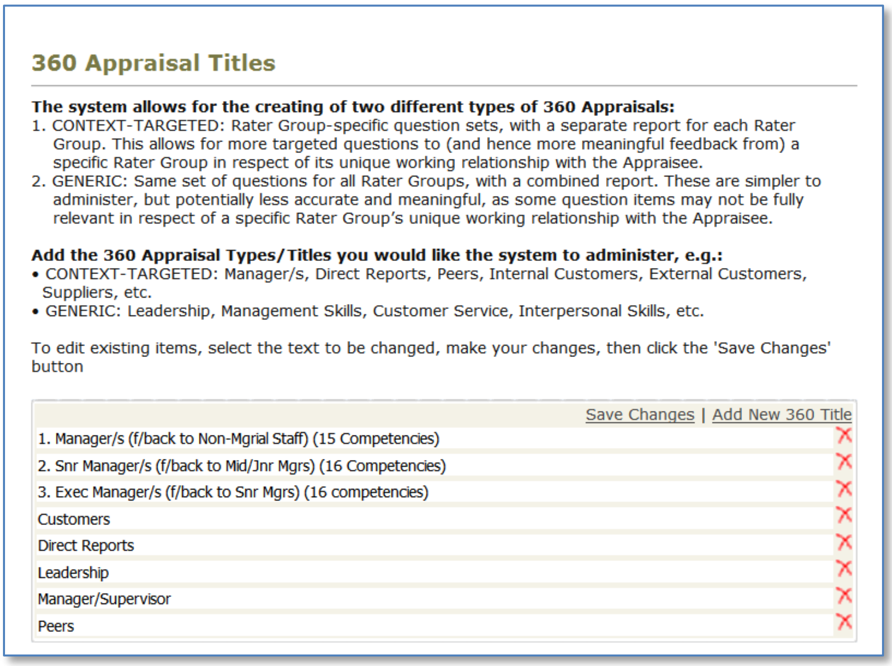


System Admin >> 360 Appraisal Titles

Cross Reference System Admin>>System Settings for additional settings Compass360

Add the 360 Appraisal Titles (Questionnaire names) you want to use (see examples in screenshot below):
- "CT" = Context-Targeted
- "G" = Generic

There is no requirement to add these abbreviations as 360 questionnaire titles such as **Managers**, **Investment Team**, **Leadership**, etc. will be perfectly fine – whatever titles you deem appropriate to differentiate between your various questionnaires and the target groups they aim at.



360 Appraisal Titles

The system allows for the creating of two different types of 360 Appraisals:
1. CONTEXT-TARGETED: Rater Group-specific question sets, with a separate report for each Rater Group. This allows for more targeted questions to (and hence more meaningful feedback from) a specific Rater Group in respect of its unique working relationship with the Appraisee.
2. GENERIC: Same set of questions for all Rater Groups, with a combined report. These are simpler to administer, but potentially less accurate and meaningful, as some question items may not be fully relevant in respect of a specific Rater Group's unique working relationship with the Appraisee.

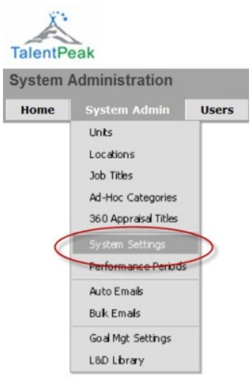
Add the 360 Appraisal Types/Titles you would like the system to administer, e.g.:
- CONTEXT-TARGETED: Manager/s, Direct Reports, Peers, Internal Customers, External Customers, Suppliers, etc.
- GENERIC: Leadership, Management Skills, Customer Service, Interpersonal Skills, etc.

To edit existing items, select the text to be changed, make your changes, then click the 'Save Changes' button

Save Changes | Add New 360 Title

1. Manager/s (f/back to Non-Mgrial Staff) (15 Competencies)
2. Snr Manager/s (f/back to Mid/Jnr Mgrs) (16 Competencies)
3. Exec Manager/s (f/back to Snr Mgrs) (16 competencies)
Customers
Direct Reports
Leadership
Manager/Supervisor
Peers

Refer to TalentPeak Compass360 in this Guide for complete information (click here)

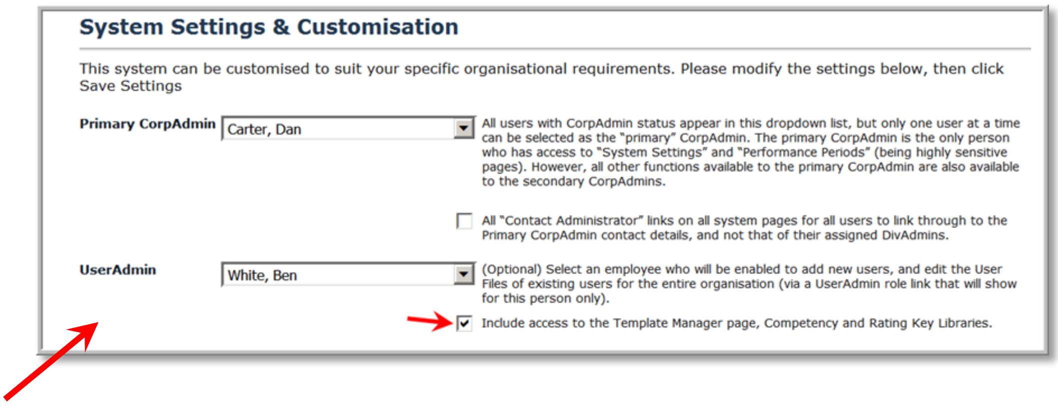


System Admin >> System Settings

Make your selections by following the instructions provided on the page and with your TalentPeak™ advisor/consultant. Please ask us to assist you with this important task to make sure that the system is tailored and optimised for your needs. The System Settings will cover many features to edit such as Access Rights, Creating Appraisal Page Options, Removing Rating Keys, Disabling Weightings, Forced Comment Features, Higher Level Manager Signoff, Form Release & Approval Settings, Job Description Activation, Employee User File & Photo settings, Appraisee & Appraisor Home Page Instructions, & Spell Checker. Also See Multirater Module and Options.

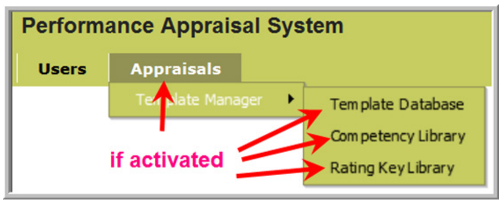
Designating CorpAdmin & UserAdmin

A User Administrator or System Administrator Assistant can be enabled to be provided with access to the system pages for maintaining User Files. With additional permission granted, the User can assist with Appraisal Templates, Competency and Rating Key Libraries, and Job Description setup/admin tasks.



With the selected employee designated as "UserAdmin", the following Access Privilege & User Icon will be enabled within their login:

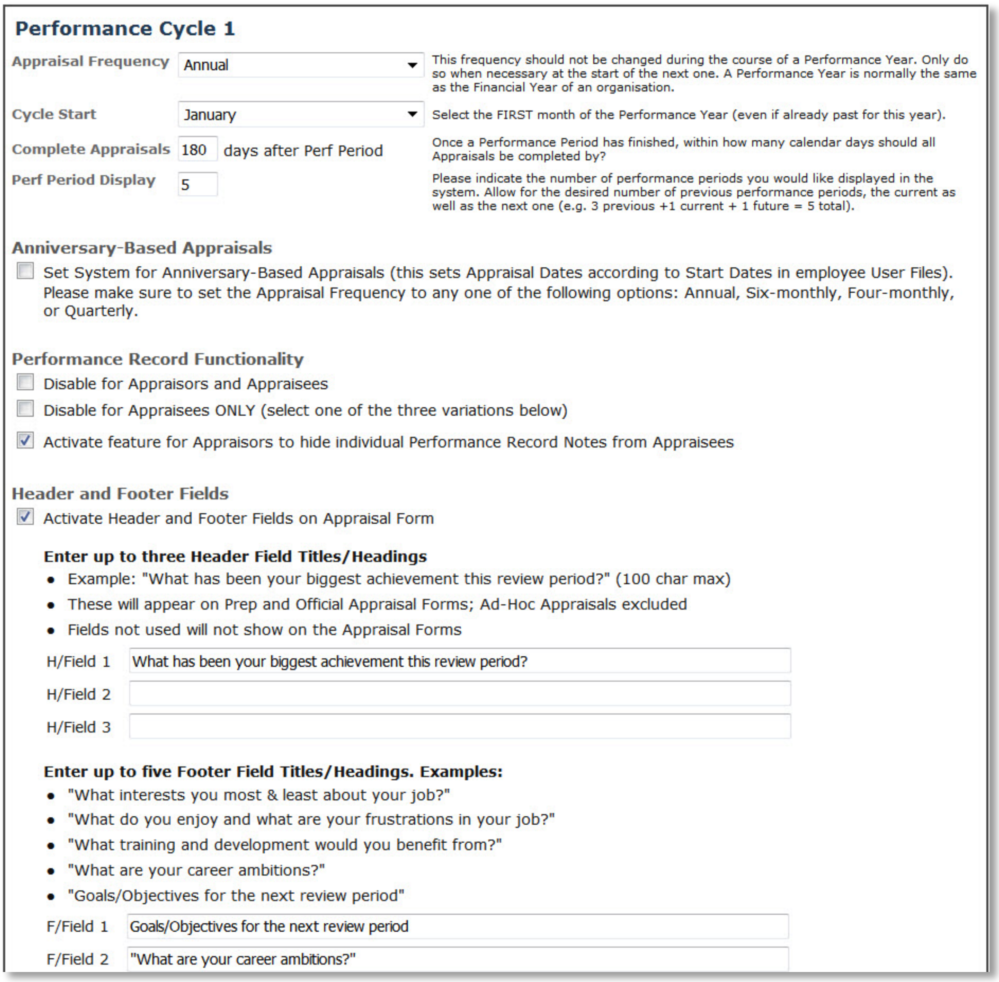
The following additional system pages will be accessible:



NOTE: If Compass360™ is enabled on your system, please refer to this Section **Compass360™** for additional settings and for the enablement of a 360 "UserAdmin" for survey set up and monitoring purposes.

Performance Cycle & Anniversary Based Settings

Please refer to your TalentPeak™ Advisor/Consultant before making changes to performance cycles; we will be reviewing these settings with you in your initial site set up webinars. Performance Periods are created according to your settings in the previous step. Any number of periods can be created, but you will just need the current one, and the next one.



Performance Cycle 1

Appraisal Frequency	Annual	This frequency should not be changed during the course of a Performance Year. Only do so when necessary at the start of the next one. A Performance Year is normally the same as the Financial Year of an organisation.
Cycle Start	January	Select the FIRST month of the Performance Year (even if already past for this year).
Complete Appraisals	180 days after Perf Period	Once a Performance Period has finished, within how many calendar days should all Appraisals be completed by?
Perf Period Display	5	Please indicate the number of performance periods you would like displayed in the system. Allow for the desired number of previous performance periods, the current as well as the next one (e.g. 3 previous +1 current + 1 future = 5 total).

Anniversary-Based Appraisals

☐ Set System for Anniversary-Based Appraisals (this sets Appraisal Dates according to Start Dates in employee User Files). Please make sure to set the Appraisal Frequency to any one of the following options: Annual, Six-monthly, Four-monthly, or Quarterly.

Performance Record Functionality

☐ Disable for Appraisors and Appraisees

☐ Disable for Appraisees ONLY (select one of the three variations below)

☑ Activate feature for Appraisors to hide individual Performance Record Notes from Appraisees

Header and Footer Fields

☑ Activate Header and Footer Fields on Appraisal Form

Enter up to three Header Field Titles/Headings

- Example: "What has been your biggest achievement this review period?" (100 char max)
- These will appear on Prep and Official Appraisal Forms; Ad-Hoc Appraisals excluded
- Fields not used will not show on the Appraisal Forms

H/Field 1 What has been your biggest achievement this review period?

H/Field 2

H/Field 3

Enter up to five Footer Field Titles/Headings. Examples:

- "What interests you most & least about your job?"
- "What do you enjoy and what are your frustrations in your job?"
- "What training and development would you benefit from?"
- "What are your career ambitions?"
- "Goals/Objectives for the next review period"

F/Field 1 Goals/Objectives for the next review period

F/Field 2 "What are your career ambitions?"

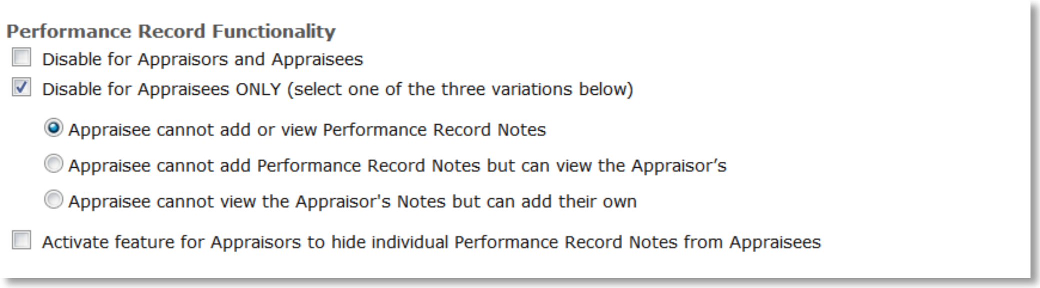
Knowledgebase FAQ - Performance Period

TalentPeak™ divides a Performance Year into evenly-spaced Performance Periods (or Cycles), each ending with Performance Appraisals for all employees. For example, Quarterly Appraisals translate into four, three-monthly Performance Periods. The Corporate System Administrator can set TalentPeak™ at any of 1, 2, 3, 4, 6, or 12-monthly Performance Appraisals on the System Settings Page.

Performance Periods are set for the entire organization, and not individual employees. This way TalentPeak™ can logically cluster all appraisals together that take place during the same Performance Period. TalentPeak™ accommodates two different Performance Cycles, e.g. exempt employees on an annual cycle, and non-exempt on a quarterly cycle. ***(Please see instructions on Systems Settings webpage for Performance Cycle 2 enablement.)***

Performance Record Functionality

Performance Record Note functionality can be disabled (is on or enabled by default); see various settings available:



Performance Record Functionality

☐ Disable for Appraisors and Appraisees

☑ Disable for Appraisees ONLY (select one of the three variations below)

◉ Appraisee cannot add or view Performance Record Notes

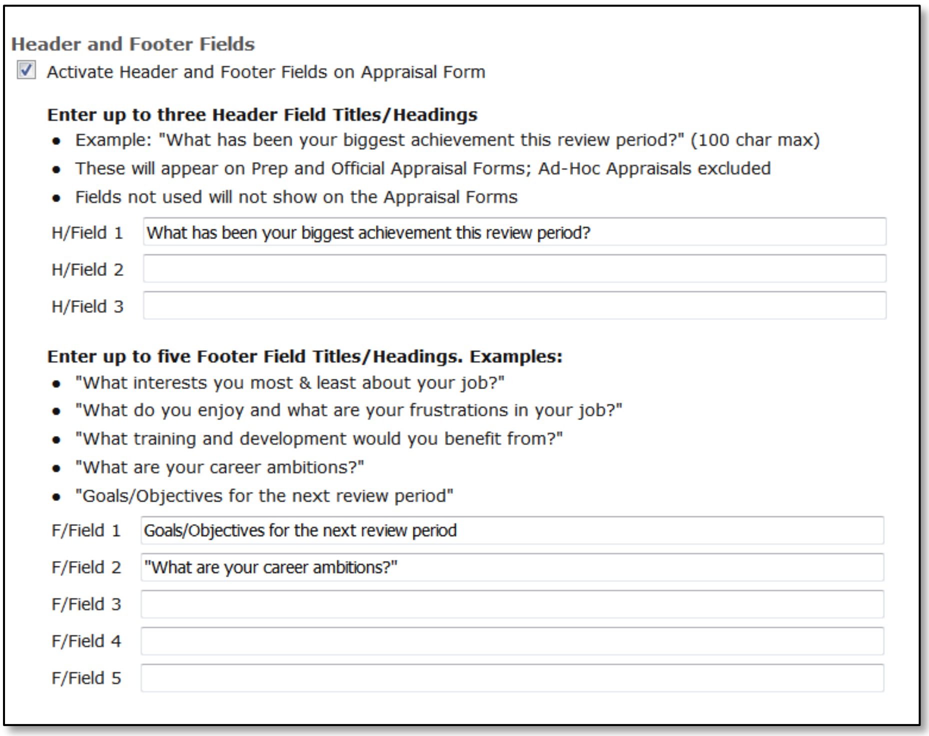
○ Appraisee cannot add Performance Record Notes but can view the Appraisor's

○ Appraisee cannot view the Appraisor's Notes but can add their own

☐ Activate feature for Appraisors to hide individual Performance Record Notes from Appraisees

Header & Footer Fields

Activate Header & Footer Fields on Appraisal Form – is viewable on all employees, default is “off”.


Header and Footer Fields
Activate Header and Footer Fields on Appraisal Form

Enter up to three Header Field Titles/Headings
- Example: "What has been your biggest achievement this review period?" (100 char max)
- These will appear on Prep and Official Appraisal Forms; Ad-Hoc Appraisals excluded
- Fields not used will not show on the Appraisal Forms

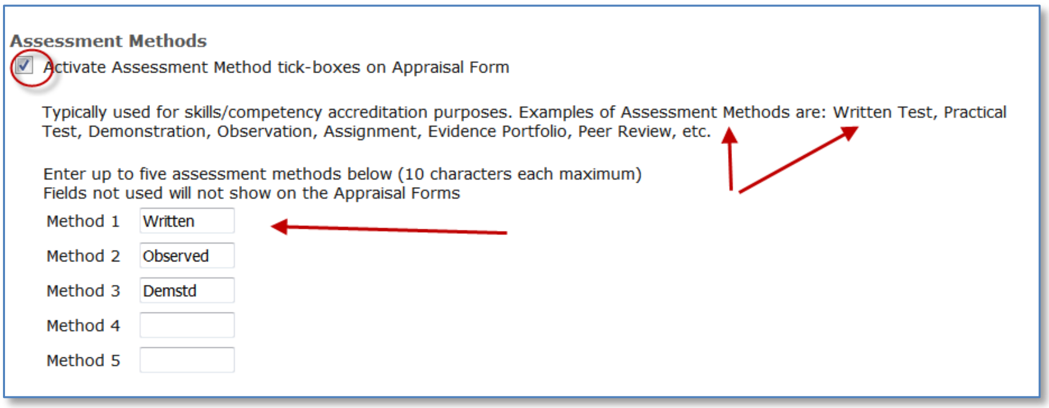
H/Field 1 What has been your biggest achievement this review period?
H/Field 2
H/Field 3

Enter up to five Footer Field Titles/Headings. Examples:
- "What interests you most & least about your job?"
- "What do you enjoy and what are your frustrations in your job?"
- "What training and development would you benefit from?"
- "What are your career ambitions?"
- "Goals/Objectives for the next review period"

F/Field 1 Goals/Objectives for the next review period
F/Field 2 "What are your career ambitions?"
F/Field 3
F/Field 4
F/Field 5

Assessment Methods

Activate Assessment Method tick-boxes on Appraisal Form


Assessment Methods
Activate Assessment Method tick-boxes on Appraisal Form

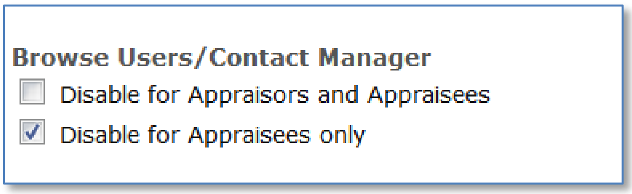
Typically used for skills/competency accreditation purposes. Examples of Assessment Methods are: Written Test, Practical Test, Demonstration, Observation, Assignment, Evidence Portfolio, Peer Review, etc.

Enter up to five assessment methods below (10 characters each maximum)
Fields not used will not show on the Appraisal Forms

Method 1 Written
Method 2 Observed
Method 3 Demstd
Method 4
Method 5

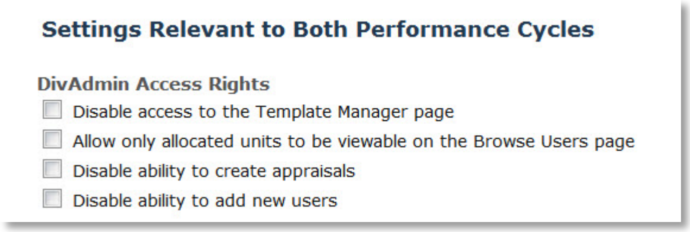
Browse Users/Contact Manager Settings

Disable or Enable Users to Search for other Users


Browse Users/Contact Manager
Disable for Appraisors and Appraisees
Disable for Appraisees only

Settings Relevant to Both Performance Cycles

DivAdmin Access Rights Settings

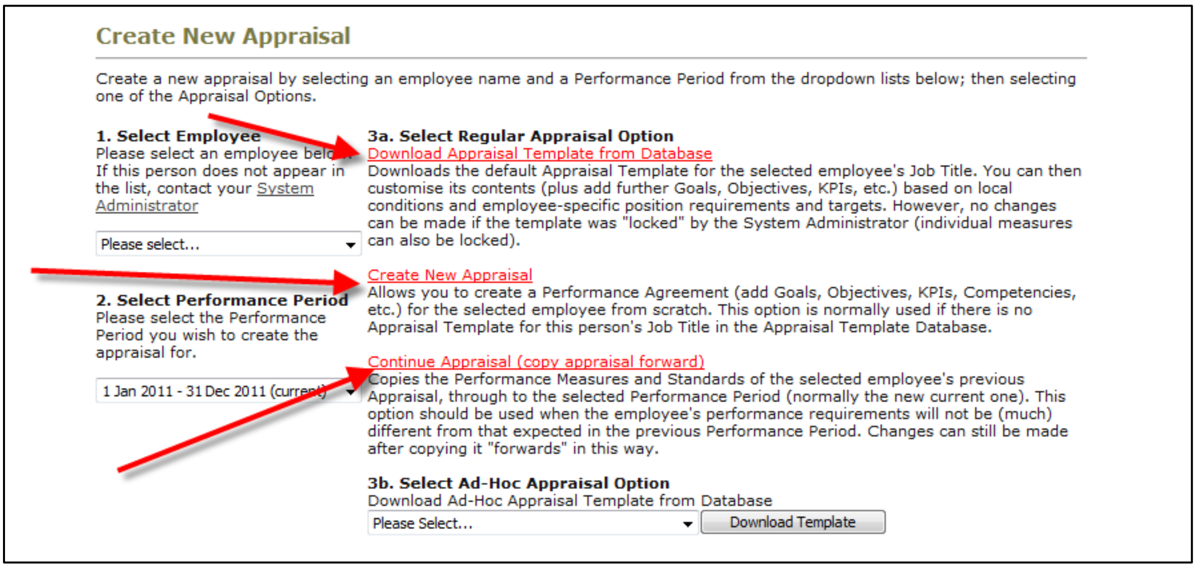


Appraisor Create New Appraisal Page Options

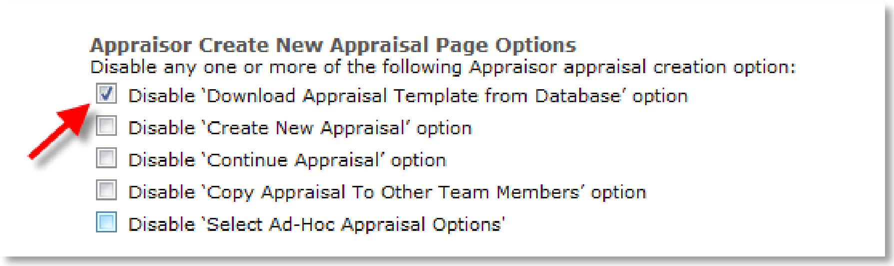
As each option is disabled only those options that are enabled appear in the Create New Appraisal page. See Below Images & Options:

View 1 – No selections

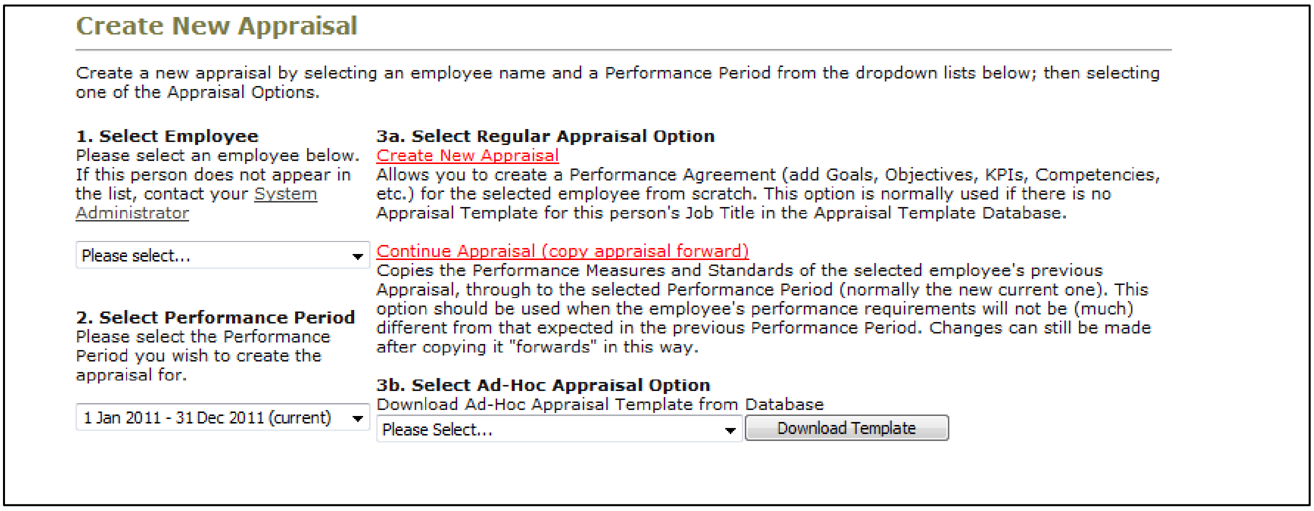
Creation Page View with none checked above (Default):



Appraisor Create New Appraisal Page Option – View 2



Creation Page View with the above/previous checked


Create New Appraisal

Create a new appraisal by selecting an employee name and a Performance Period from the dropdown lists below; then selecting one of the Appraisal Options.

1. Select Employee
Please select an employee below. If this person does not appear in the list, contact your System Administrator

Please select...

2. Select Performance Period
Please select the Performance Period you wish to create the appraisal for.

1 Jan 2011 - 31 Dec 2011 (current)

3a. Select Regular Appraisal Option
Create New Appraisal
Allows you to create a Performance Agreement (add Goals, Objectives, KPIs, Competencies, etc.) for the selected employee from scratch. This option is normally used if there is no Appraisal Template for this person's Job Title in the Appraisal Template Database.

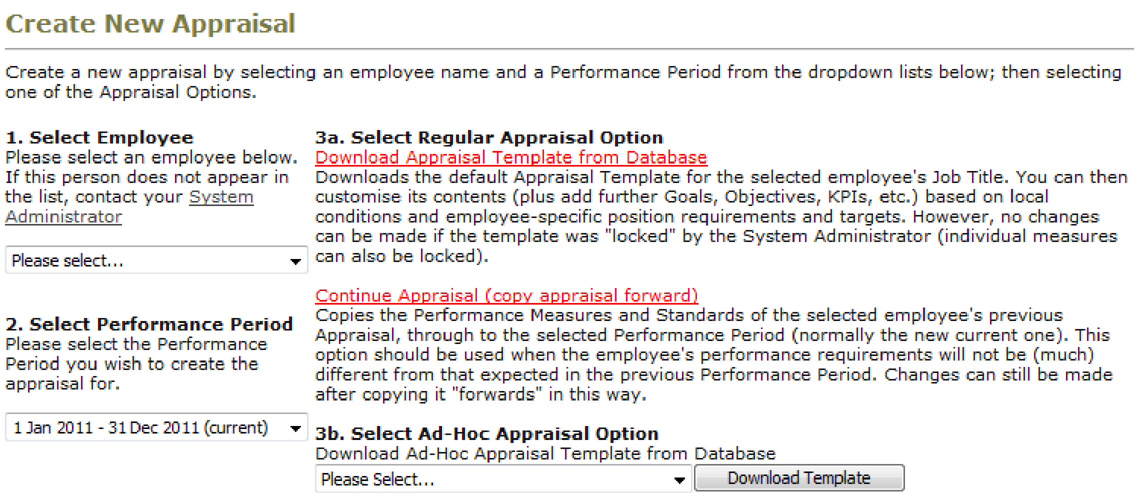
Continue Appraisal (copy appraisal forward)
Copies the Performance Measures and Standards of the selected employee's previous Appraisal, through to the selected Performance Period (normally the new current one). This option should be used when the employee's performance requirements will not be (much) different from that expected in the previous Performance Period. Changes can still be made after copying it "forwards" in this way.

3b. Select Ad-Hoc Appraisal Option
Download Ad-Hoc Appraisal Template from Database
Please Select... Download Template

Appraisor Create New Appraisal Page Option – View 3


Appraisor Create New Appraisal Page Options
Disable any one or more of the following Appraisor appraisal creation option:
- [ ] Disable 'Download Appraisal Template from Database' option
- [x] Disable 'Create New Appraisal' option
- [ ] Disable 'Continue Appraisal' option
- [ ] Disable 'Copy Appraisal To Other Team Members' option
- [ ] Disable 'Select Ad-Hoc Appraisal Options'

Creation Page View with above checked


Create New Appraisal

Create a new appraisal by selecting an employee name and a Performance Period from the dropdown lists below; then selecting one of the Appraisal Options.

1. Select Employee
Please select an employee below. If this person does not appear in the list, contact your System Administrator

Please select...

2. Select Performance Period
Please select the Performance Period you wish to create the appraisal for.

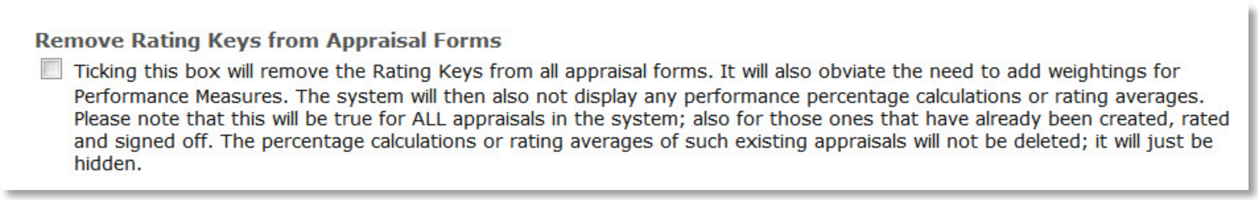
1 Jan 2011 - 31 Dec 2011 (current)

3a. Select Regular Appraisal Option
Download Appraisal Template from Database
Downloads the default Appraisal Template for the selected employee's Job Title. You can then customise its contents (plus add further Goals, Objectives, KPIs, etc.) based on local conditions and employee-specific position requirements and targets. However, no changes can be made if the template was "locked" by the System Administrator (individual measures can also be locked).

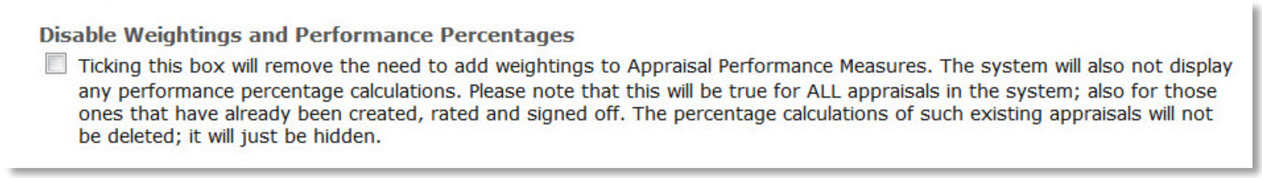
Continue Appraisal (copy appraisal forward)
Copies the Performance Measures and Standards of the selected employee's previous Appraisal, through to the selected Performance Period (normally the new current one). This option should be used when the employee's performance requirements will not be (much) different from that expected in the previous Performance Period. Changes can still be made after copying it "forwards" in this way.

3b. Select Ad-Hoc Appraisal Option
Download Ad-Hoc Appraisal Template from Database
Please Select... Download Template

Remove Rating Keys from Appraisal Forms

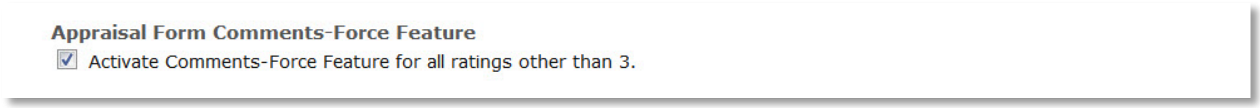

Remove Rating Keys from Appraisal Forms
- [ ] Ticking this box will remove the Rating Keys from all appraisal forms. It will also obviate the need to add weightings for Performance Measures. The system will then also not display any performance percentage calculations or rating averages. Please note that this will be true for ALL appraisals in the system; also for those ones that have already been created, rated and signed off. The percentage calculations or rating averages of such existing appraisals will not be deleted; it will just be hidden.

Disable Weightings and Performance Percentages


Disable Weightings and Performance Percentages

☐ Ticking this box will remove the need to add weightings to Appraisal Performance Measures. The system will also not display any performance percentage calculations. Please note that this will be true for ALL appraisals in the system; also for those ones that have already been created, rated and signed off. The percentage calculations of such existing appraisals will not be deleted; it will just be hidden.

Appraisal Form Comments-Force Feature


Appraisal Form Comments-Force Feature

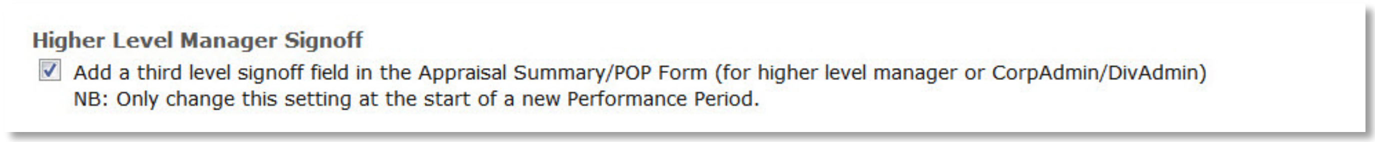
☑ Activate Comments-Force Feature for all ratings other than 3.

Agreement Release to Appraisee


Agreement Release to Appraisee

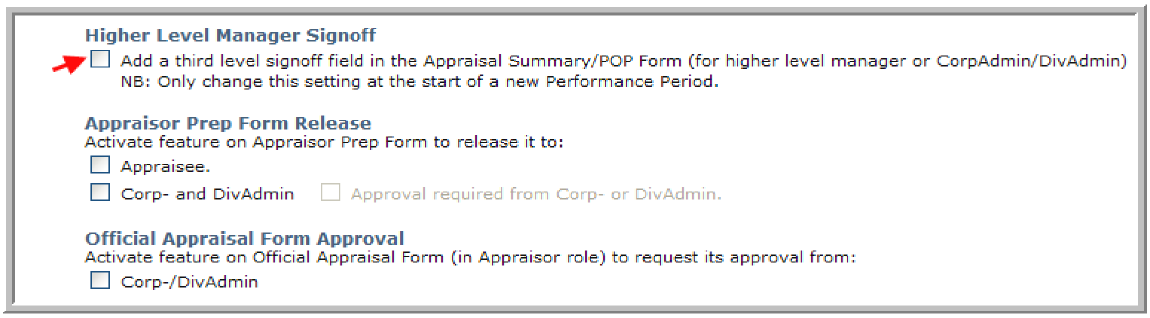
☑ Ticking this box will enable an Appraisor to (temporarily) release a Performance Agreement Form to an Appraisee (to edit).

Higher Level Manager Signoff


Higher Level Manager Signoff

☑ Add a third level signoff field in the Appraisal Summary/POP Form (for higher level manager or CorpAdmin/DivAdmin)
NB: Only change this setting at the start of a new Performance Period.

System Settings view, with Higher Level Manager (HLM) Signoff feature **NOT** activated:


Higher Level Manager Signoff

☐ Add a third level signoff field in the Appraisal Summary/POP Form (for higher level manager or CorpAdmin/DivAdmin)
NB: Only change this setting at the start of a new Performance Period.

Appraisor Prep Form Release

Activate feature on Appraisor Prep Form to release it to:

☐ Appraisee.

☐ Corp- and DivAdmin ☐ Approval required from Corp- or DivAdmin.

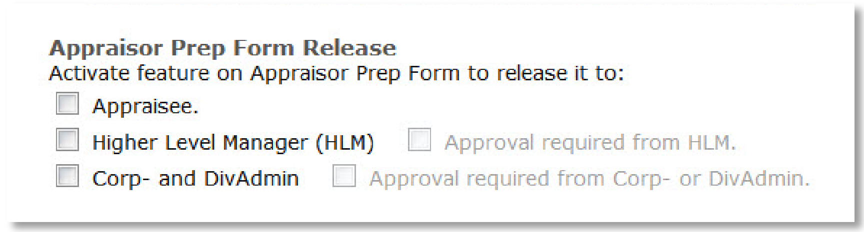
Official Appraisal Form Approval

Activate feature on Official Appraisal Form (in Appraisor role) to request its approval from:

☐ Corp-/DivAdmin

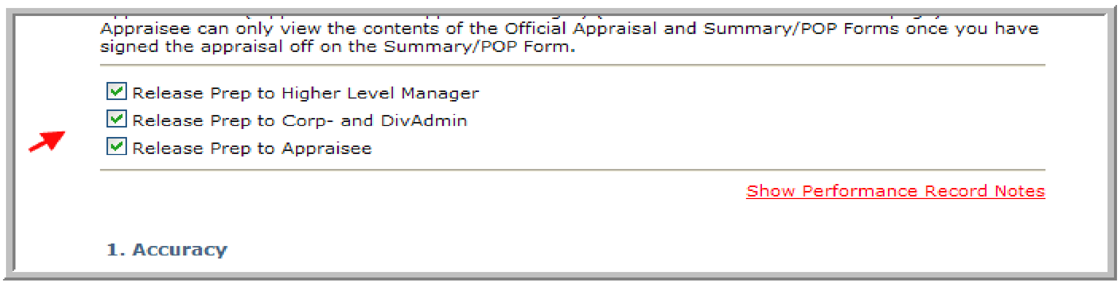
Additional System Settings view, with Higher Level Manager (HLM) Signoff feature activated:

Appraisor Prep Form Release (and optional Approvals)



System Settings: You can select any one or more recipients, depending on who you want Appraisors to release their completed Preps to.

It will show as follows on the **Appraisor Prep Form**, which he/she can then tick (any one or more) to release it to the respective parties. Ticking will trigger a system-generated email to them.

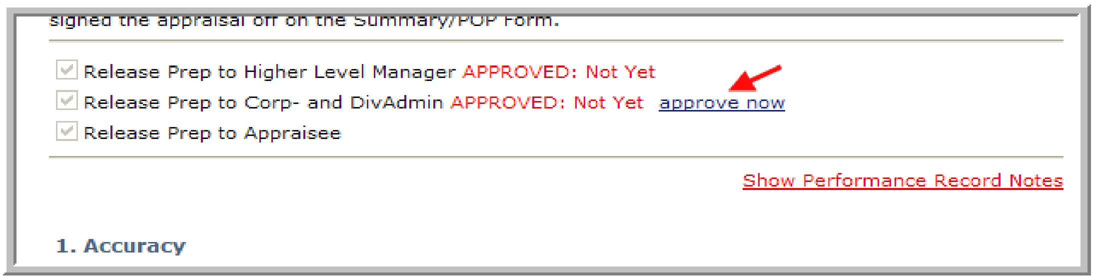


It shows released as follows on the **Appraisal Manager** page of those parties it was released to (red link):

Appraisor Prep Shows Red when Released to View

The **System Settings** can also optionally be activated to **require approval of the Appraisor Prep** by the Corp-/DivAdmin and/or HLM (if latter activated).

On the released **Appraisor Prep Form** it will show as follows (example below that of Corp-/DivAdmin role)



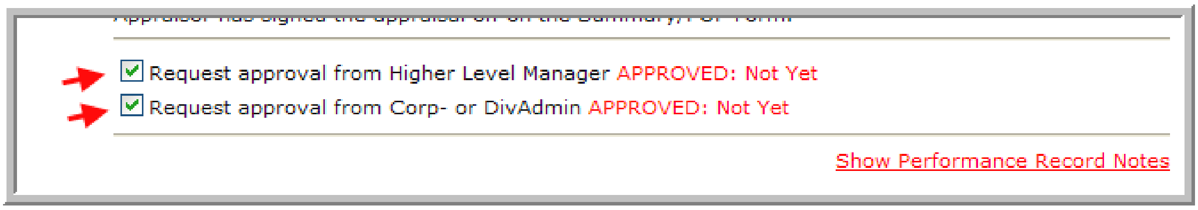
And when approved:

NOTE: The system-generated email for the Corp-/DivAdmin will go to BOTH, if a DivAdmin was assigned to the Appraisee's unit as well. Both Corp- and DivAdmin/s will be able to view the released Appraisor Prep Form, and either one can approve it (if approval feature activated), so please decide and communicate WHO should approve the Appraisor Prep Form: Corp- or DivAdmin (same applies to Official Appraisal Form as explained below).

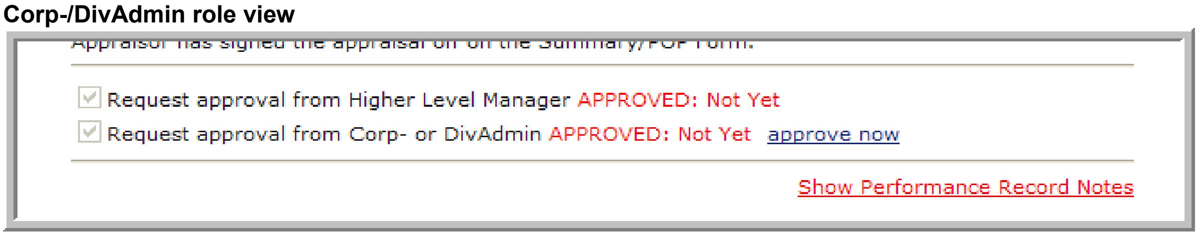
Official Appraisal Form Approval

System Settings view, “Enforce Approval” feature NOT activated:

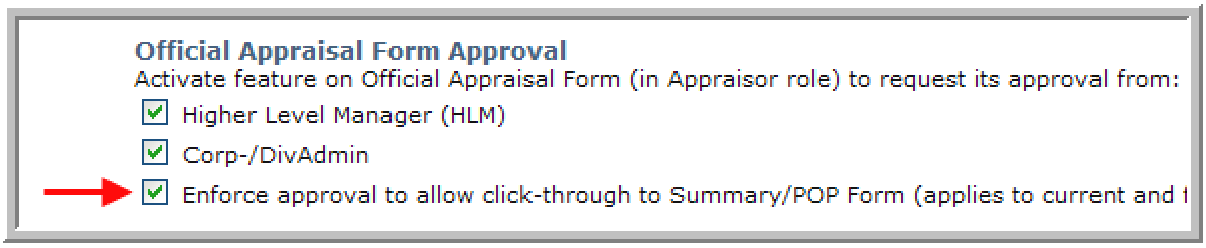
With BOTH (Admins & HLM) activated, it shows as follows on the **Official Appraisal Form** in the Appraisor Role, which he/she can then activate once satisfied with its accuracy: Again, the system will send out emails to the respective parties.



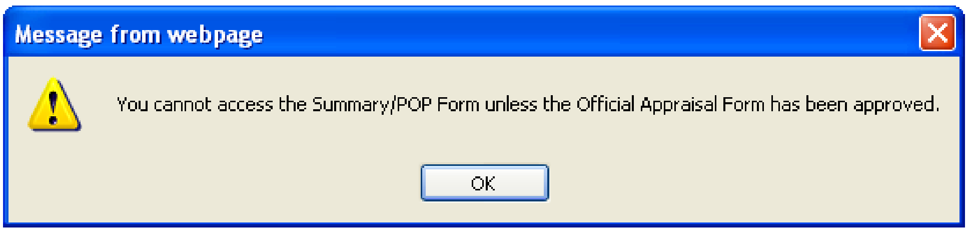
Corp-/DivAdmin role view



With the “ENFORCE APPROVAL” feature activated in **System Settings**…

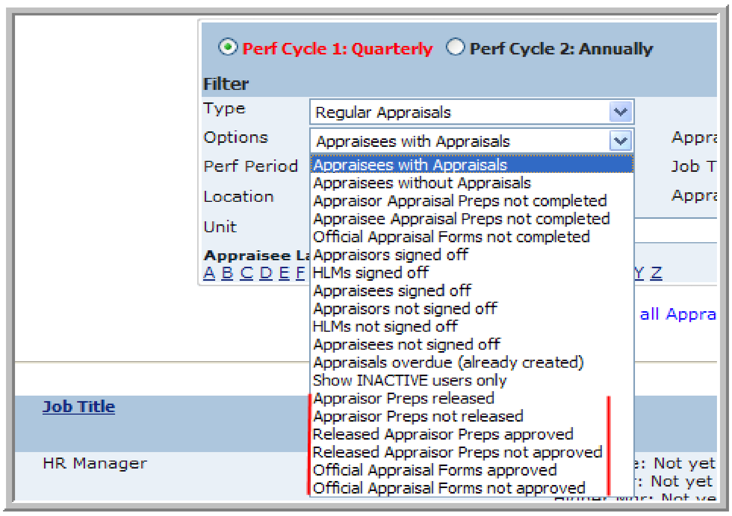


…approval by the respective parties will be mandatory, otherwise the following alert will show when anybody wants to click the **Summary/POP Form** link:



NOTE: This will only be true for current and future performance periods

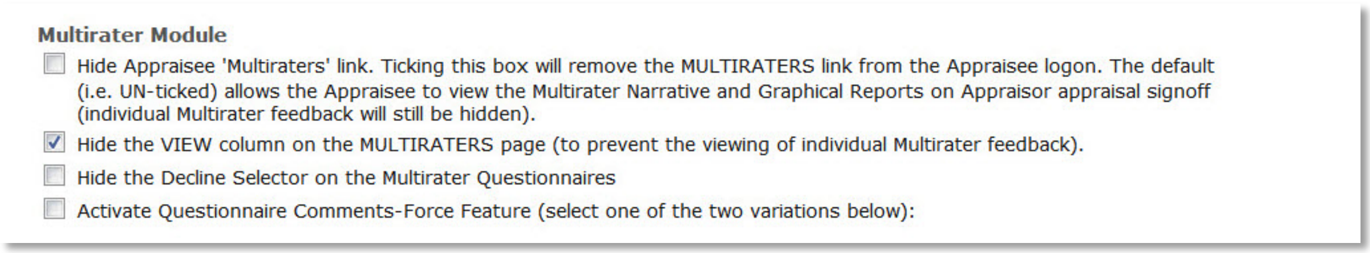
Appraisal Manager View Options with Various Settings Enabled:



Job Descriptions

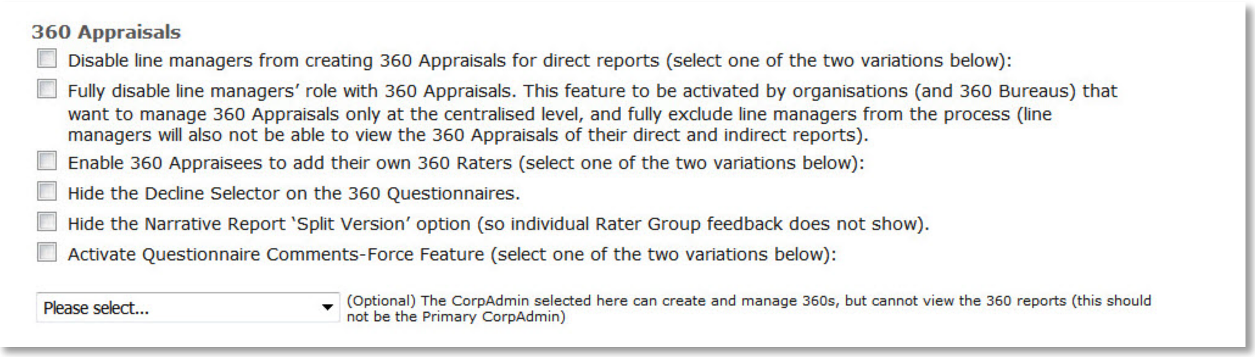
Also See Job Description Template Builder in this Section

Multirater Module

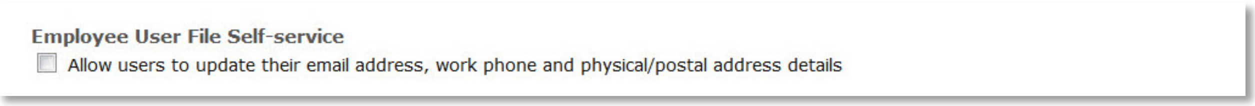


(If you do not want the Multirater Module for your organization, it can be disabled (*or enabled* if you do not currently have it on,) by IFP tech support.) The CorpAdmin has the ability to activate or de-activate settings for the Multirater Module. The Appraisees (by default) can also view the Multirater Reports from their login, once the Summary/Pop Form has been signed off; but CorpAdmins have the ability to de-activate the MULTIRATERS link on the Appraisee's side if they so wish. Please also refer to the **APPRAISORS User Guide for Managers** and the information in this Section.

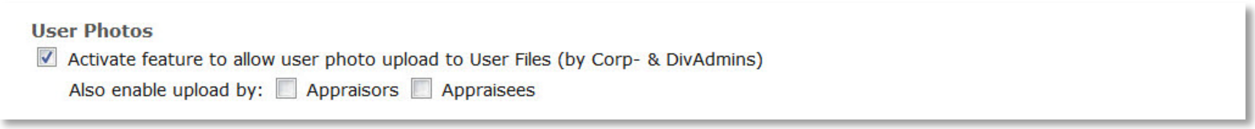
Compass360 Appraisals (if enabled)



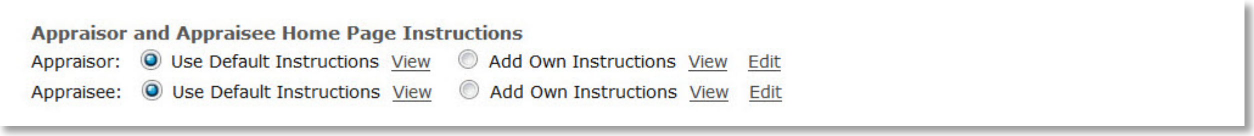
Employee User File Self-service

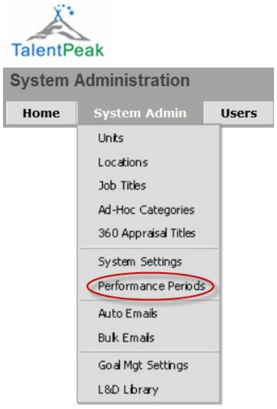


User Photos



Appraisor and Appraisee Home Page Instructions





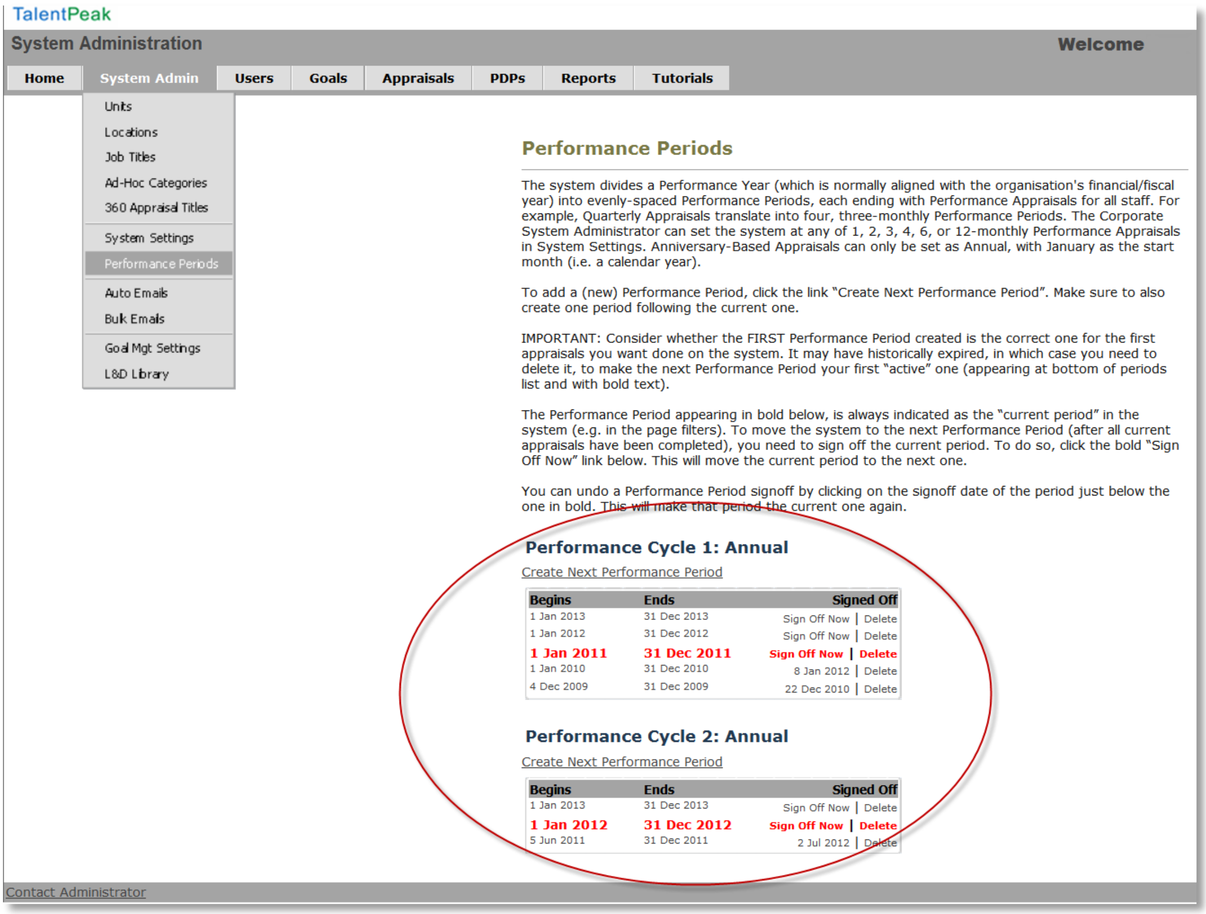
System Admin >> Performance Periods

Follow the instructions provided. Performance Periods are created according to your settings in the previous step. Any number of periods can be created, but you will just need the current one, and the next one.

Knowledgebase FAQ - Performance Period

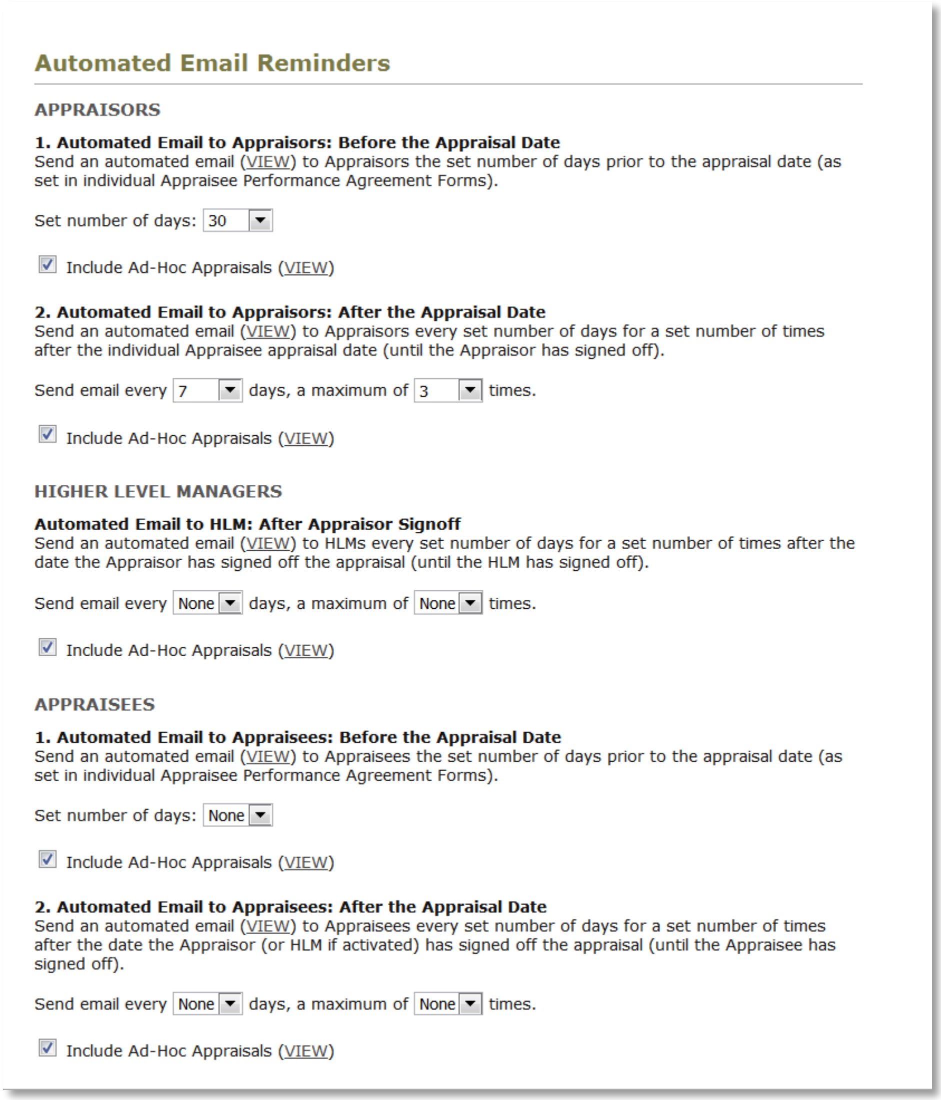
TalentPeak™ divides a Performance Year into evenly-spaced Performance Periods (or Cycles), each ending with Performance Appraisals for all employees. For example, Quarterly Appraisals translate into four, three-monthly Performance Periods. The Corporate System Administrator can set TalentPeak™ at any of 1, 2, 3, 4, 6, or 12-monthly Performance Appraisals on the System Settings Page.

Performance Periods are set for the entire organization, and not individual employees. This way TalentPeak™ can logically cluster all appraisals together that take place during the same Performance Period. TalentPeak™ accommodates two different Performance Cycles, e.g. exempt employees on an annual cycle, and non-exempt on a quarterly cycle.



System Admin >> Auto Emails

Set automated email reminders for **Regular and Ad-Hoc Appraisals**. Follow the instructions provided; please ask your TalentPeak™ advisor/consultant or email support for help.



Automated Email Reminders

APPRAISORS

1. Automated Email to Appraisors: Before the Appraisal Date
Send an automated email (VIEW) to Appraisors the set number of days prior to the appraisal date (as set in individual Appraisee Performance Agreement Forms).

Set number of days: 30

☑ Include Ad-Hoc Appraisals (VIEW)

2. Automated Email to Appraisors: After the Appraisal Date
Send an automated email (VIEW) to Appraisors every set number of days for a set number of times after the individual Appraisee appraisal date (until the Appraisor has signed off).

Send email every 7 days, a maximum of 3 times.

☑ Include Ad-Hoc Appraisals (VIEW)

HIGHER LEVEL MANAGERS

Automated Email to HLM: After Appraisor Signoff
Send an automated email (VIEW) to HLMs every set number of days for a set number of times after the date the Appraisor has signed off the appraisal (until the HLM has signed off).

Send email every None days, a maximum of None times.

☑ Include Ad-Hoc Appraisals (VIEW)

APPRAISEES

1. Automated Email to Appraisees: Before the Appraisal Date
Send an automated email (VIEW) to Appraisees the set number of days prior to the appraisal date (as set in individual Appraisee Performance Agreement Forms).

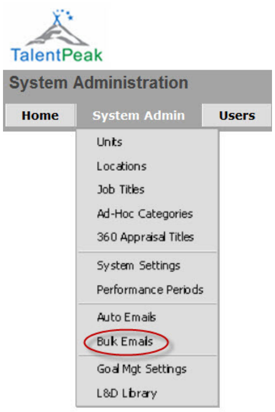
Set number of days: None

☑ Include Ad-Hoc Appraisals (VIEW)

2. Automated Email to Appraisees: After the Appraisal Date
Send an automated email (VIEW) to Appraisees every set number of days for a set number of times after the date the Appraisor (or HLM if activated) has signed off the appraisal (until the Appraisee has signed off).

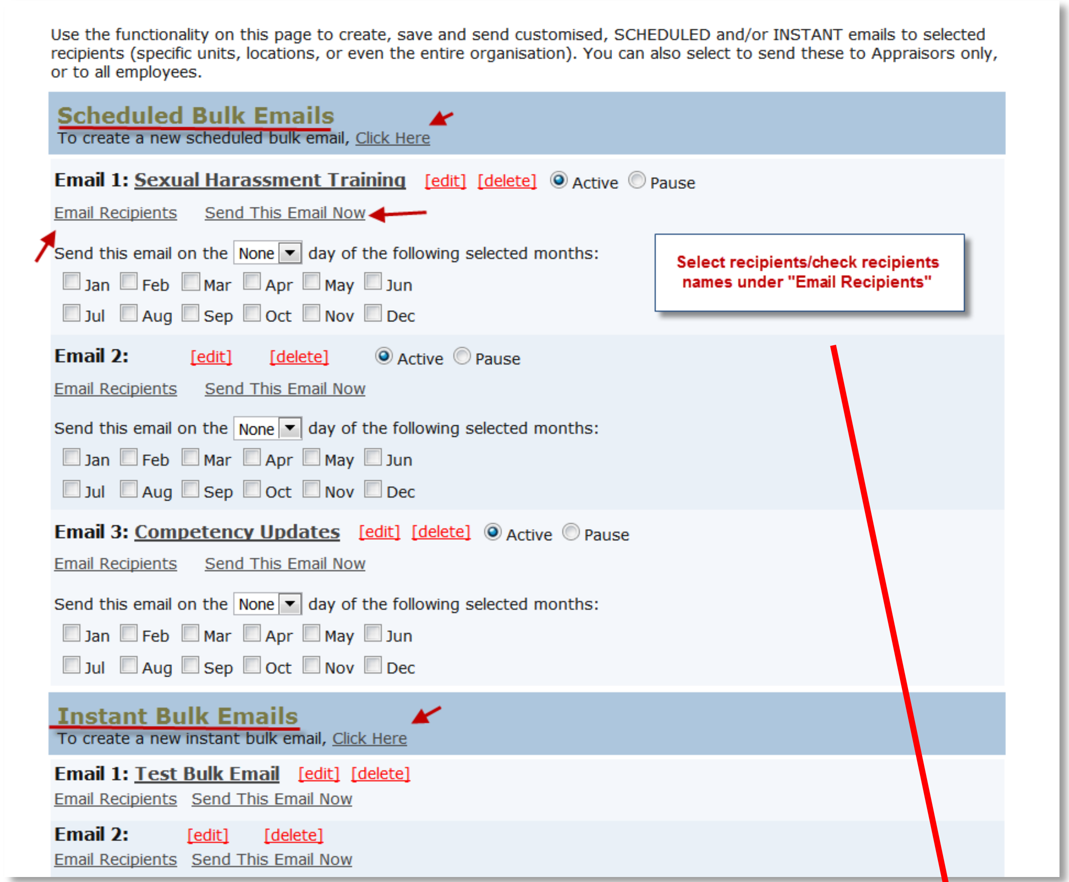
Send email every None days, a maximum of None times.

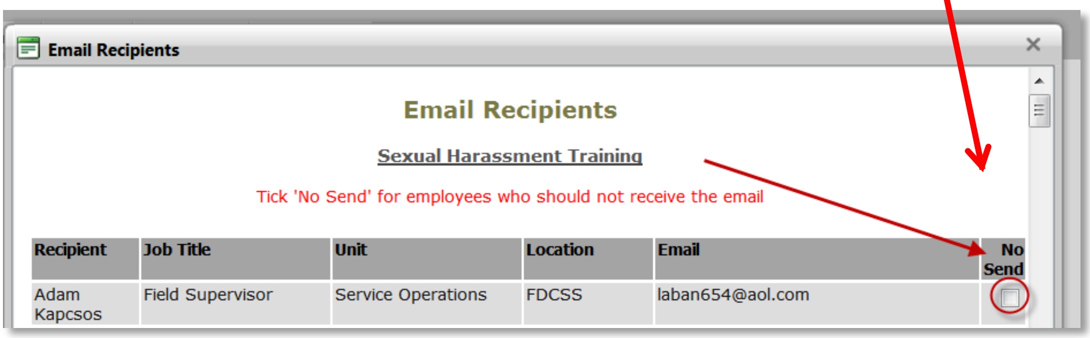
☑ Include Ad-Hoc Appraisals (VIEW)

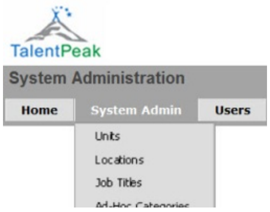


System Admin >> Bulk Emails

Please follow the instructions provided, see Sample below:

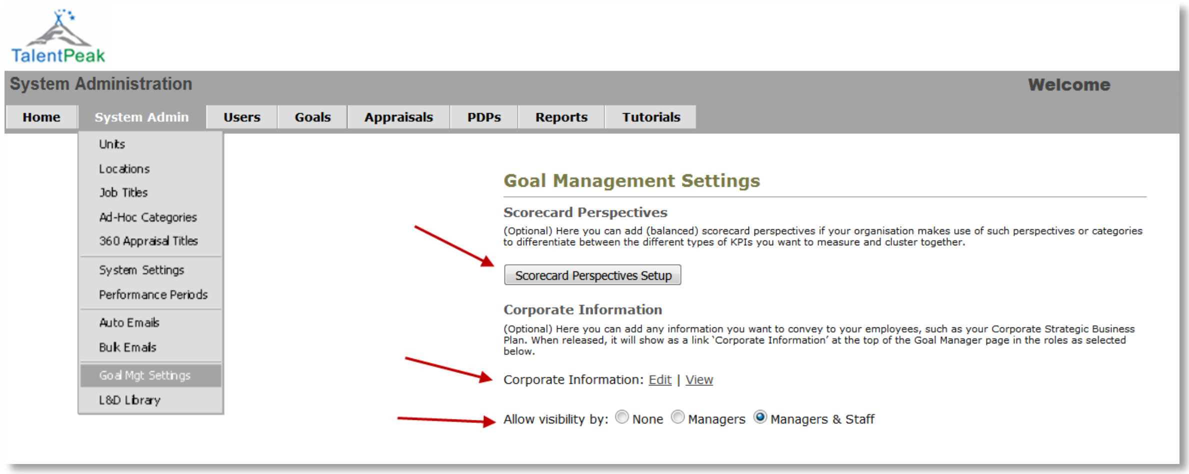


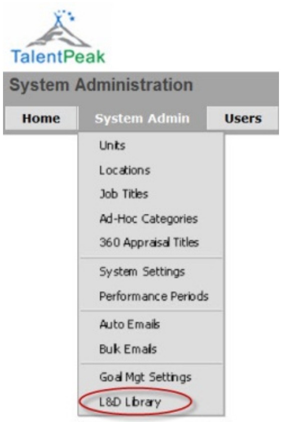




System Admin>>Goal Management Settings

If enabled for your organization the System Admin Goal Management Settings will be viewable. Please also refer to the **Summit Goal Management™ System** Section of this Guide or separate User Guide for more information.





System Admin>>L&D Library Settings

The **L&D Library** is the place where you can add all the formal learning/training and development (L&D) activities and interventions that you organization offers to your employees, i.e. all INTERNAL and EXTERNAL courses, seminars, workshops, conferences, etc.

If enabled for your organization the System Admin L & D Library Settings will be viewable. Please also refer to the **Learning & Development System** Section of this Guide for more information.

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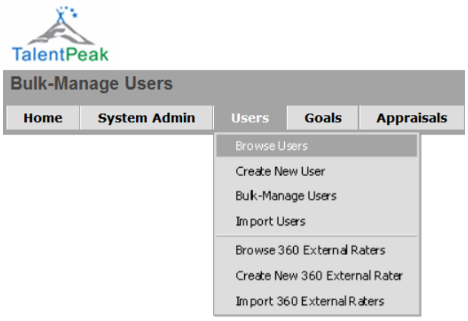
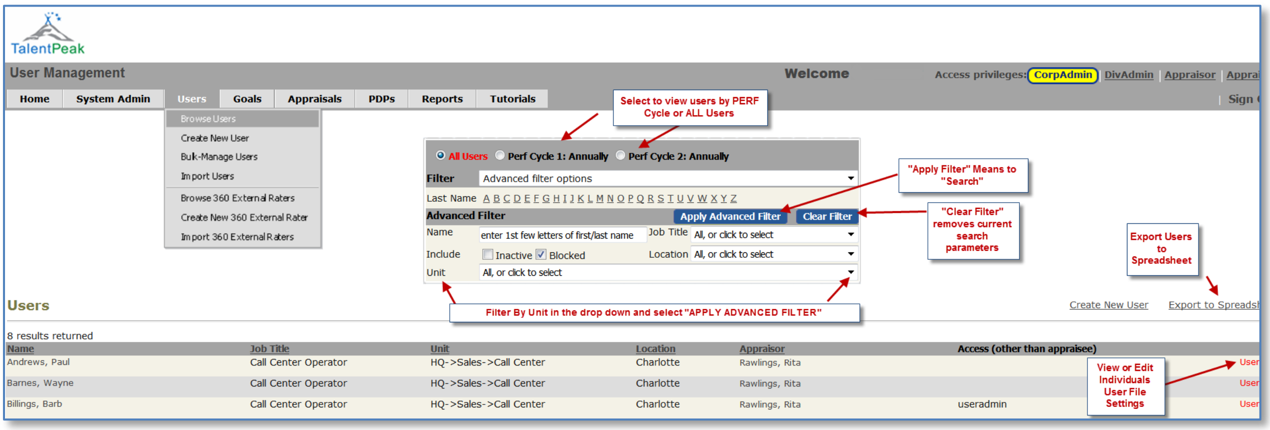
USERS

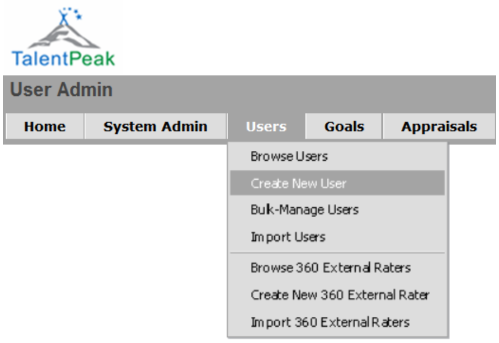


Users >> Browse Users

This page contains a list of all the users uploaded into the system. To edit users' details, click on their **User File** links on the far right of the screen. This will open their User Files where you can edit their details.



Clicking on user names on the left of the page opens non-editable "pop-up" User Files. To edit the individual's User File, click on the "Red" **User** name on the far right. Clicking on column headings sorts the items below in alternating ascending and descending lists (alphabetically and numerically). Use the filter at the top of the page to affect various search combinations.



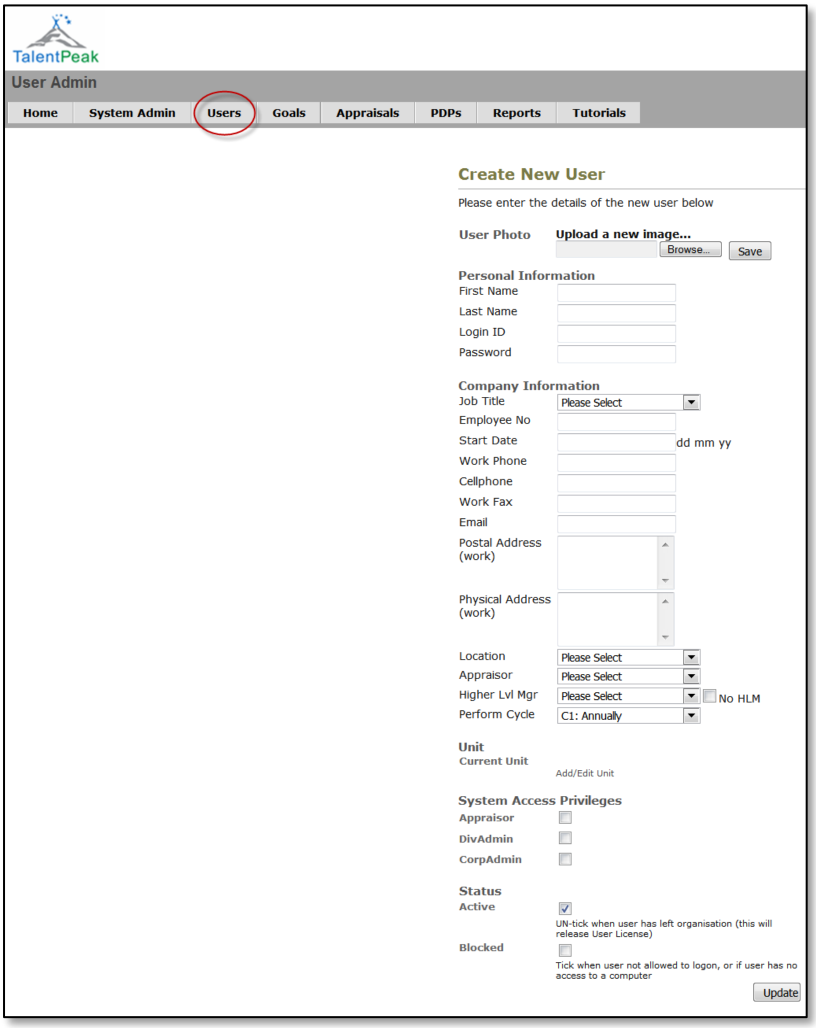
Users >> Create New User

All employees in the organisation need to be loaded as users to enable their appraisals being done on the system, and their records being kept in the database (whether some worker-level employees may have access to PC or not).

The "Create New User" page is self-explanatory, except for the following fields that may need some additional clarification:

Login ID: We strongly recommend that you use an employee's work **email address** here (and that they keep it that way).

Password: You can leave the Password field empty. When you "Save/Update" the User File, the system will automatically generate a randomly-selected eight-letter password, which will be "hashed" in the User File (appearing as four stars, for security purposes). ([Refer to User File Details in Knowledgebase)](Refer to User File Details in Knowledgebase) (Refer to APPRAISEE GUIDE)



Users >> System Access Privileges

- **Appraisor:** Tick this box if a user has staff members to appraise (normally all managers and supervisors with employees reporting to them).
- **CorpAdmin:** See System Roles.
- **DivAdmin:** See System Roles.
- **UserAdmin:** See System Roles & See UserAdmin Setup

A specific DivAdmin can be assigned to any number of top- or lower-level units in Unit Administration **(System Admin >> Units)**. Click "edit" next to the relevant unit or sub-unit, and select a DivAdmin from the dropdown list (it is even possible to select a second DivAdmin for the same unit). When saved, this person's name will show in the organisation structure on the UNITS page.
NOTE: It is not compulsory to assign DivAdmins for your organisation, as the CorpAdmin will still be able to view the User Files and appraisal records of all employees.

Users >> Editing User Files

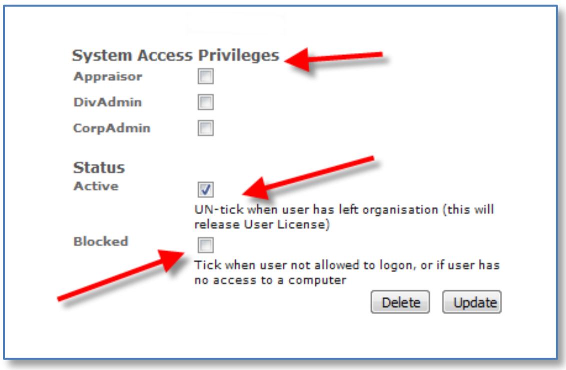
Editing capability capabilities are based on one's role in the system. Obviously the higher one's privilege level such as CorpAdmin, System admin and Div.Admin the greater their editing powers. Set out below is a cascaded overview of the editorial powers based on one's highest privilege level in the system, starting at:

- CorpAdmin & System Admin & DivAdmin, then
- Manager/Appraisor then
- Appraisee level.

CorpAdmin/System Admin/DivAdmin

- Corp.Admins can edit any and all fields in all user files
- System Admin can edit any and all fields in all user files
- Div.Admin can edit all fields in only those users within their Division or Business Units

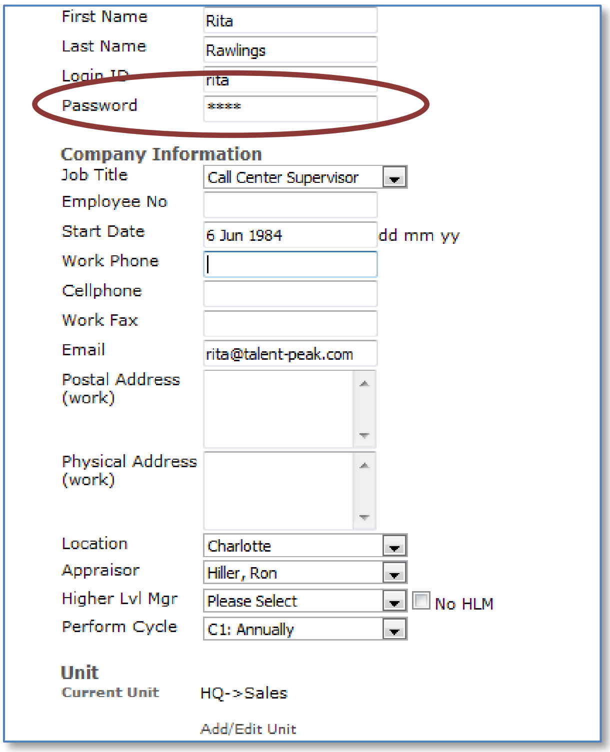
It is important to note that each can edit all fields in the user file including the privilege level and status of a user. **Appraisors cannot edit System Access Privileges or Status.**



User Files & Passwords - Editing Rights & Permissions

CorpAdmins, System Admins, Div.Admins Role - can edit all of the fields below including the user's password. Security is ensured by allowing the user to log in at any time and change his or her password. Editable fields have "boxes around them".

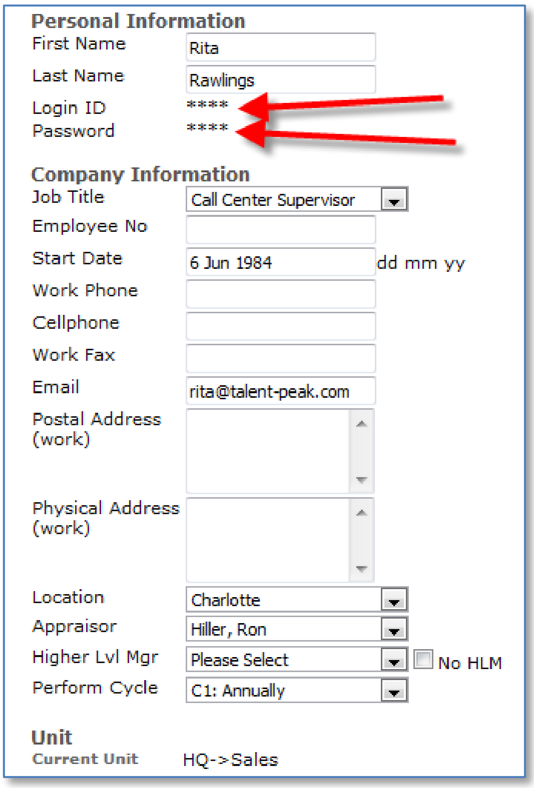
View # 1 – Password is editable in CorpAdmin, System Admin & DivAdmin



Appraisor Role

The appraisor can edit all the user file fields of their direct reports **with the exception of the user's log in ID, their user password, privilege level, and status; they are not editable fields.**

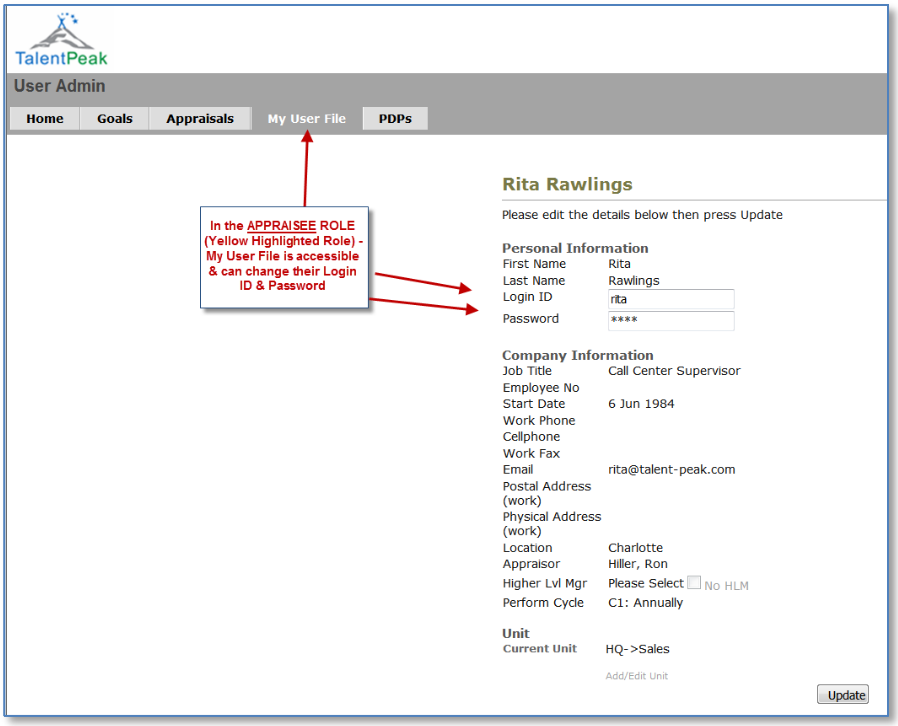
View # 2 – Login ID & Password are NOT editable within the Appraisor Role access to User file



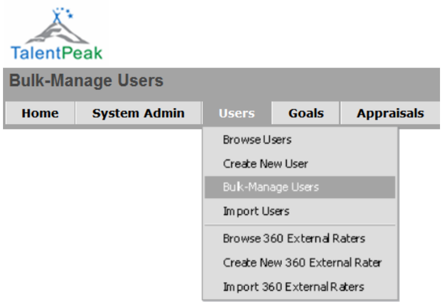
Appraisor Role

The appraisor can edit all the user file fields of their direct reports **with the exception of the user's log in ID, their user password, privilege level, and status; they are not editable fields.**

Appraisee Role



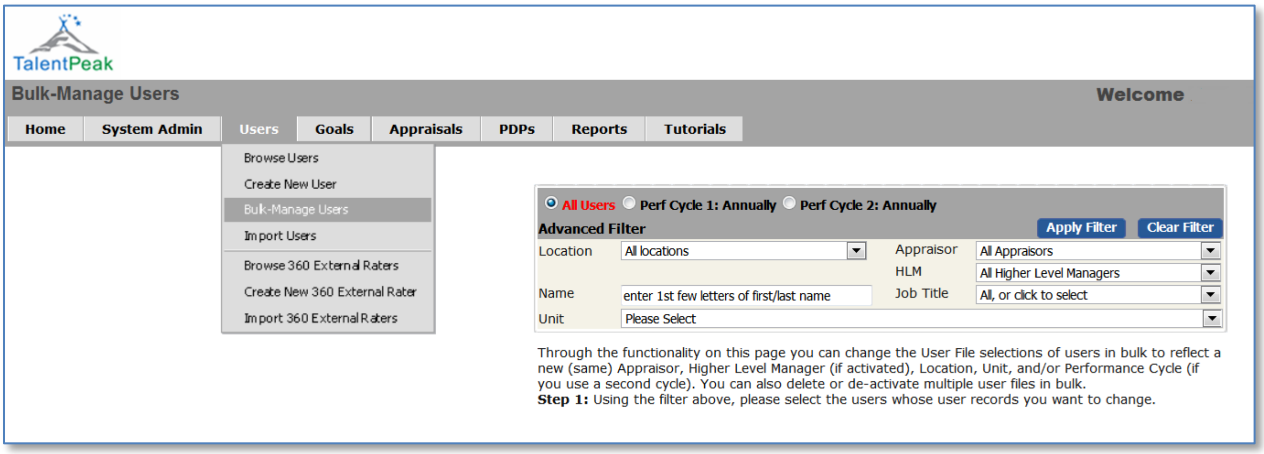
As an **Appraisee, if** the self-service feature **is turned on** in System Settings; gives users the ability to update their own contact information – login ID, email, phone, physical address only. **Users can always edit their password** whether the self-service feature is turned on or not. If the self service is not turned on, appraisees can edit their login ID and password only.



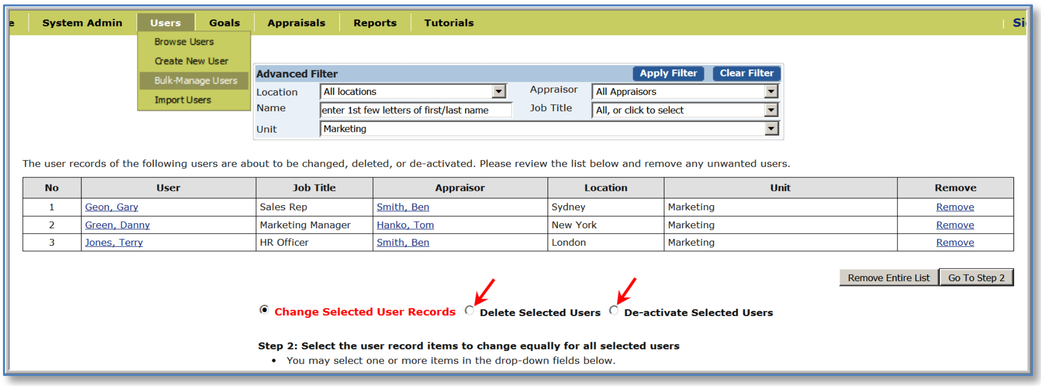
Users >> Bulk-Manage Users

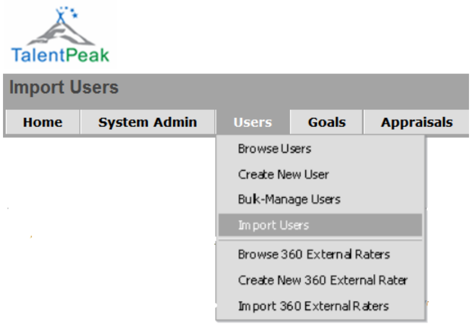
Through the functionality on this page you can change the User File selections of users in bulk to reflect a new (same) Appraisor, Higher Level Manager (if activated), Job Title, Location, Unit, and/or Performance Cycle (if you use a second cycle). In other words: move selected users in bulk to new units, locations, appraisors, etc. The Bulk-Manage feature also provides the ability whereby multiple users can be deleted or de-activated at the same time.

View 1



View 2

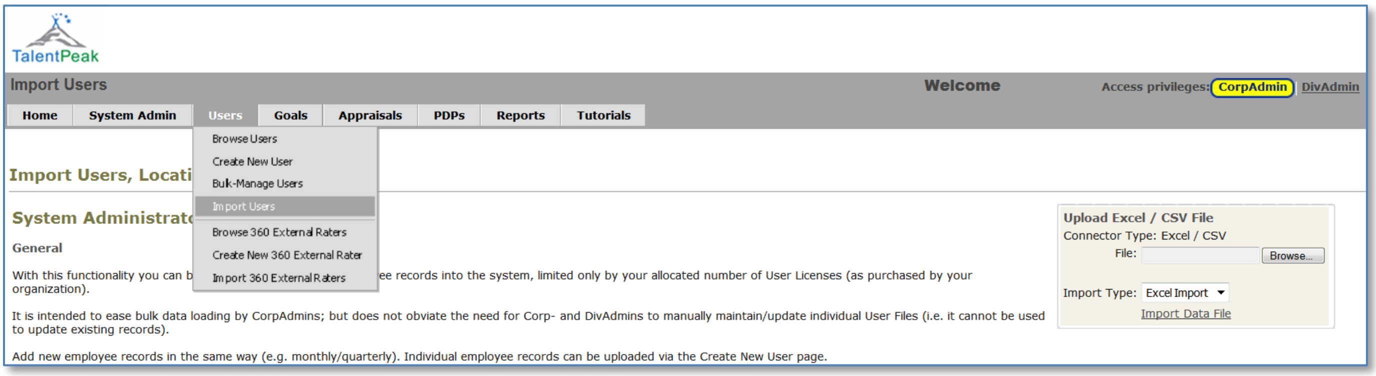


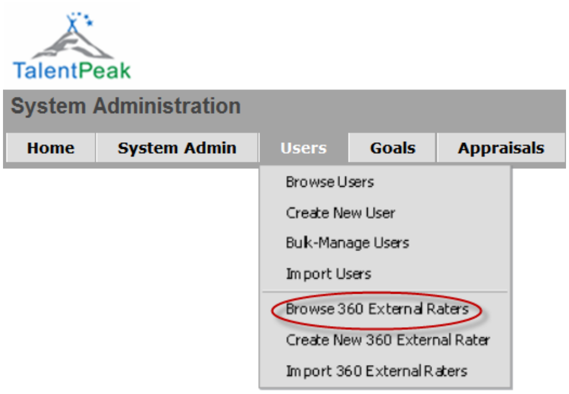


Users >> Import Users

This utility allows you to bulk-import all your User Files into the system. To do so, export all your employee details from your HRIS/Payroll System into the Excel Spreadsheet User Import Template (provided by us). This populated spreadsheet can then be imported into the system, creating User Files for all your employees in one go (as well as, simultaneously, import all your Job Titles and Locations into their respective system pages). Please Request the IMPORT TEMPLATE if you haven't already received this. We will approve it and upload it for you.

Follow the detailed instructions provided on this page (Import Users). Also make sure the **Start Dates** (if being added) **are all 100%** accurate as per the examples provided.

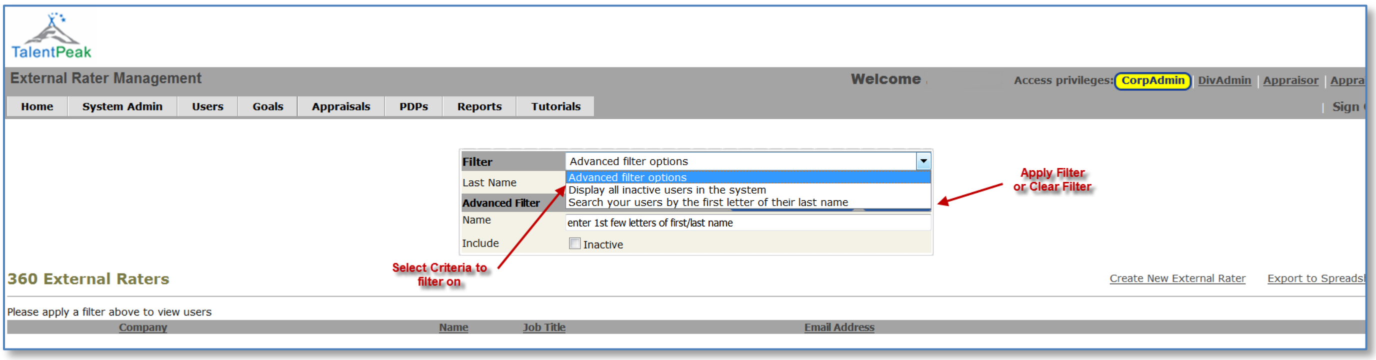


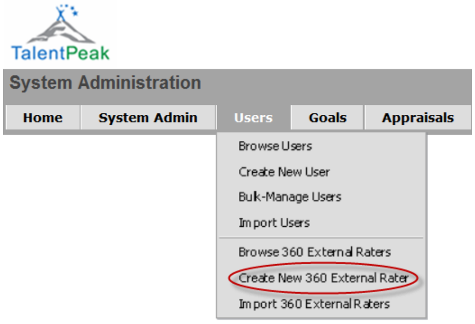


Users >> Browse 360 External Raters

If Compass360™ is activated, you will be able to filter and view your **External Users** or External Raters (users outside of the organization) profiles under this section.

Please refer to **Compass360**™ Section of this guide for complete information.

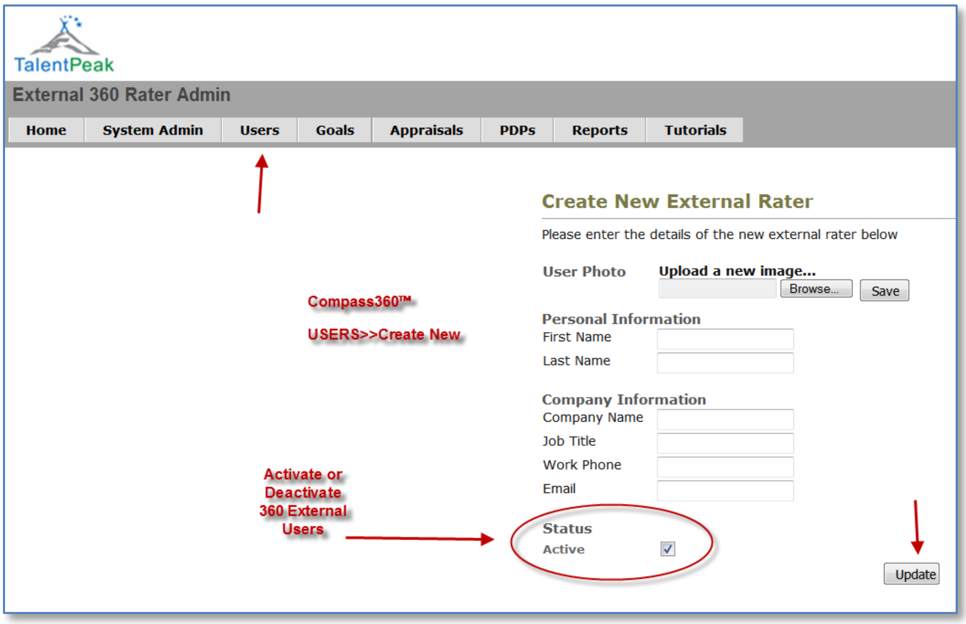


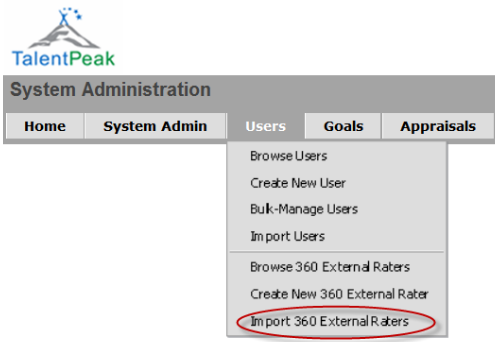


Users >> Create New 360 External Raters

Add new External Raters manually (or optionally import/upload); also editing of External Users Profile and activating or deactivating is done here.

Please refer to **Compass360**™ Section of this guide for complete information.

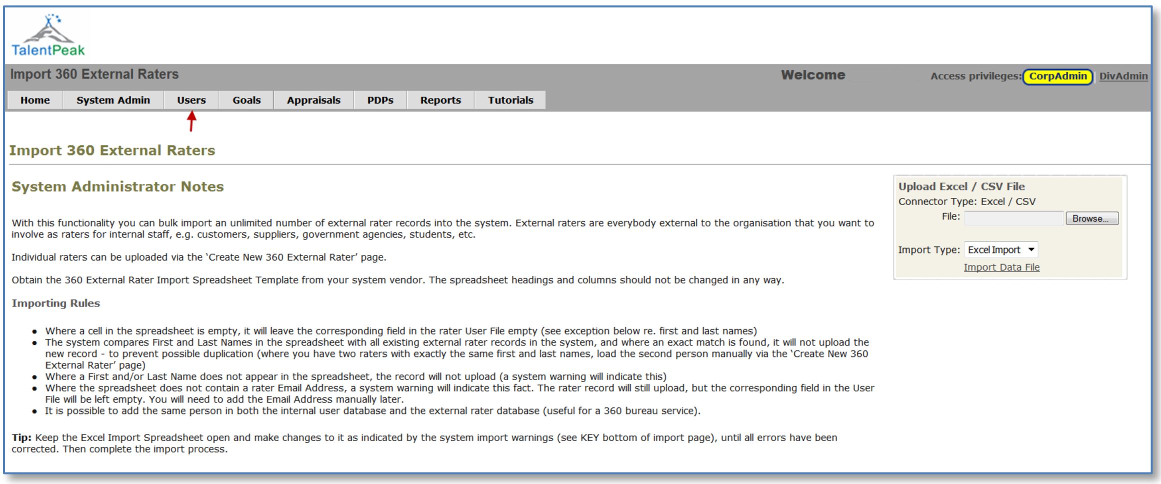




Users >> Import 360 External Raters

External 360 Raters can also be added into the system via the import/upload template.

Please refer to **Compass360™** Section of this guide for complete information



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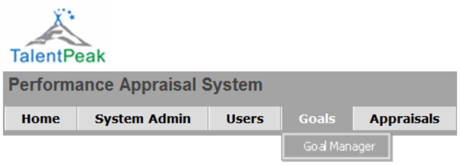
GOALS

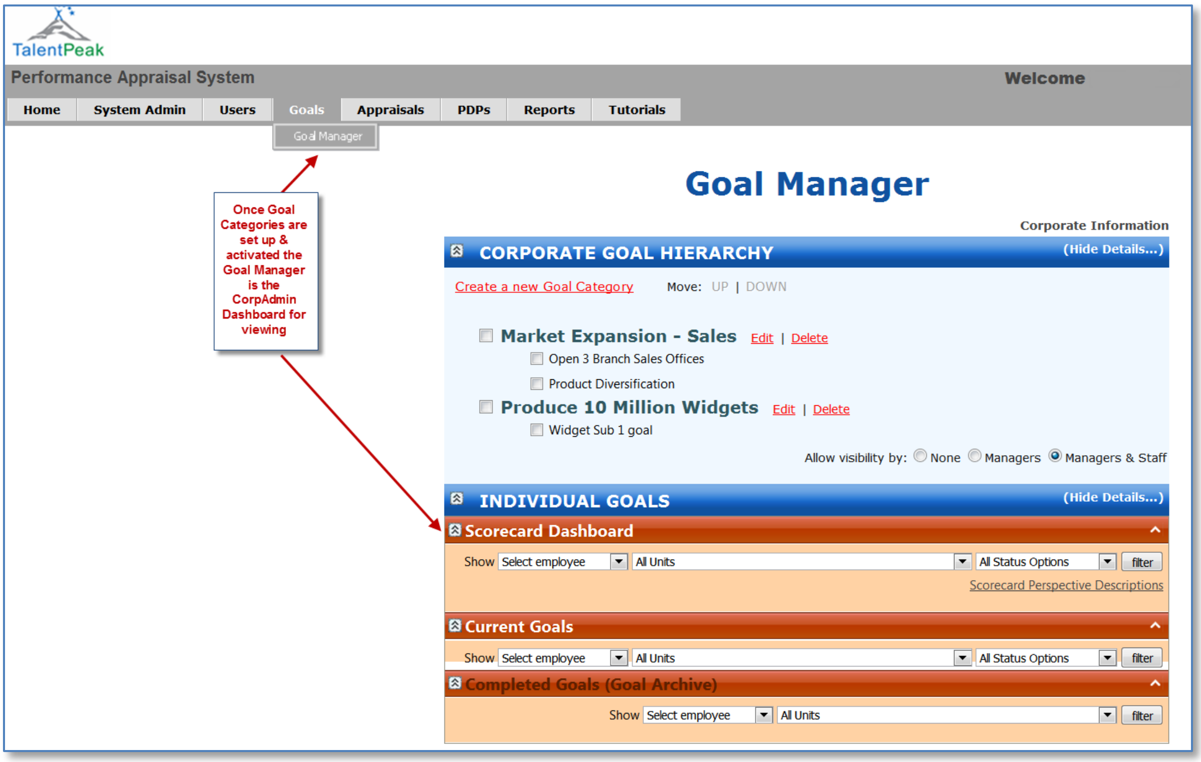


Goal Manager Dashboard

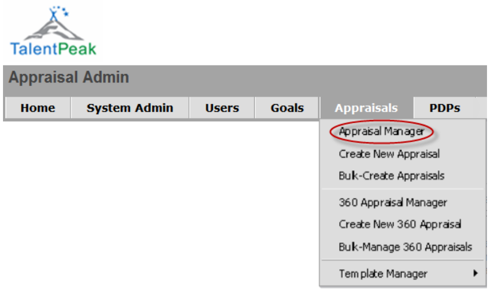
The **Summit Goal Management™ (GM) system** is an **add-on** module to the core TalentPeak™ (regular performance appraisals) System or can be set up as a standalone system. If it is activated, you will see the "GOALS" in the navigation.

Please see the TalentPeak Summit Goal Management™ Section in this CorpAdmin Guide or for additional information.

Goal Manager Settings

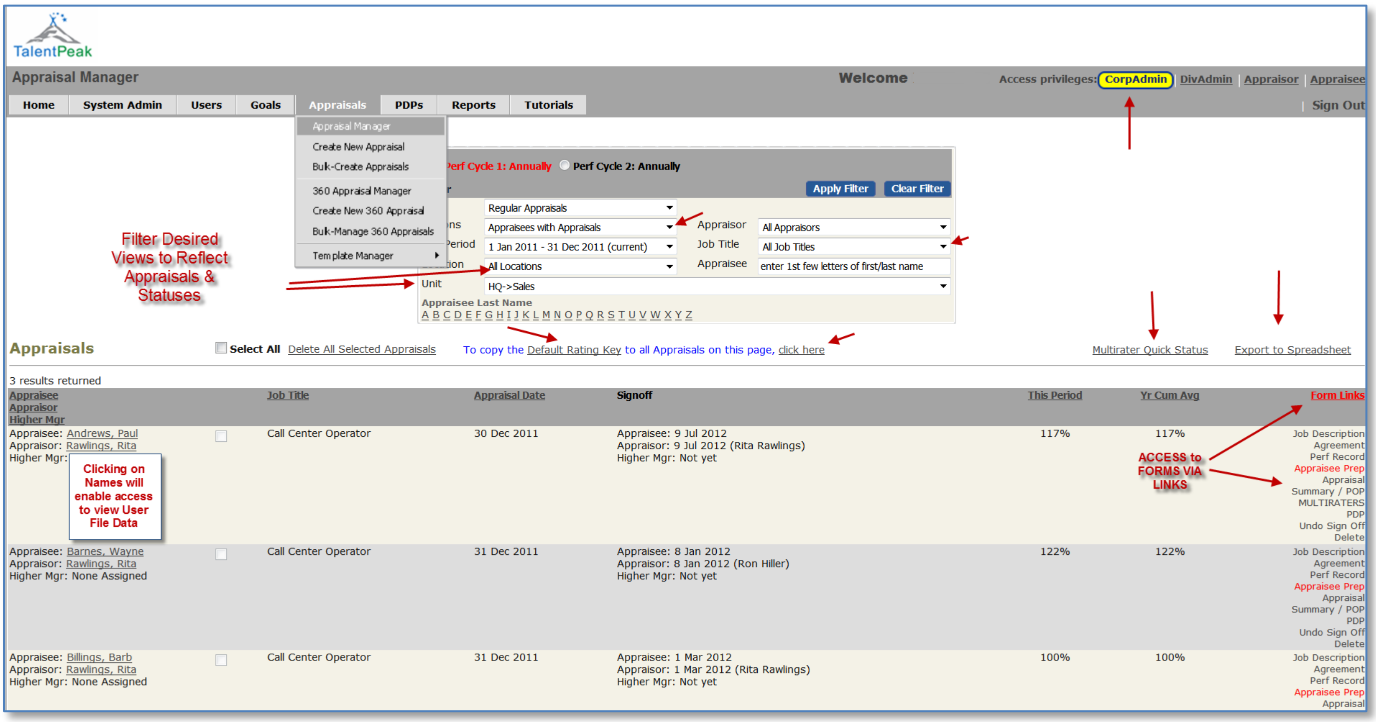


APPRAISALS



Appraisals>>Appraisal Manager

On the Appraisal Manager page you can view and monitor the status of the appraisals of **all employees** from the **CorpAdmin** view. From the **DivAdmin** or **Appraisor Role**, you can view only your direct reports (Appraisees), as well as “indirect” reports if you have further units “under you” (click the UNIT dropdown list in the filter to see the lower-level units). The Appraisal that you have created last will always show at the bottom of the list of appraisals on this page.



The Appraisal Manager page is also a “portal” for gaining access to the following online forms of each Appraisee (see links on far right):

- **Job Description** (if this feature is activated): Shows view/print version of Job Description.
- **Agreement:** Opens the Performance Agreement, e.g. to edit.
- **Perf Record:** To upload Performance Record Notes of good or poor Appraisee work performance or behaviour throughout the performance period.
- **Appraisor Prep:** Takes you to the Appraisor Preparation (Draft) Form. The Appraisor’s PREP form cannot be viewed by the Appraisee, or anybody else for that matter – unless the feature to allow its release is activated in System Settings (Appraisees have their own PREP Form, also called “Self-Appraisal”).
- **Appraisal:** Takes you to the Official Appraisal Form of the Appraisee (to be completed after the appraisal interview). The contents of the Appraisor PREP Form can be transferred into this form (individual measures, or the entire PREP Form contents in one go - see transfer links on the PREP Form).
  NOTE: The Official Appraisal Form cannot be viewed by the Appraisee from his/her login until such time as the Appraisor - and Higher Level Manager (HLM) if activated - signs off on the Appraisal (the HLM can e.g. be the Appraisor’s boss or the Corp- or DivAdmin)
- **Summary/POP:** Contains the Performance Percentage Calculations (or rating averages), Performance Optimisation Plans, and signoff links. NOTE: The Summary/POP Form also cannot be viewed by the Appraisee from his/her login until such time as the Appraisor (and HLM if activated) signs off on the Appraisal.
- **Delete:** Deletes an appraisal that has not been signed off yet.

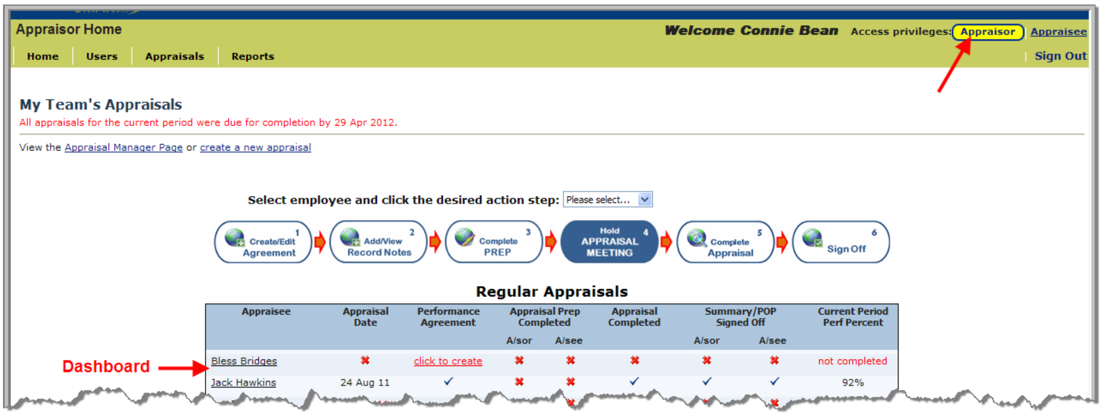
Also Refer to Definitions [Section](#)

Additional Appraisal Manager Views for Appraisors

To View, click the “Appraisor” role-link (this link will now be highlighted yellow).

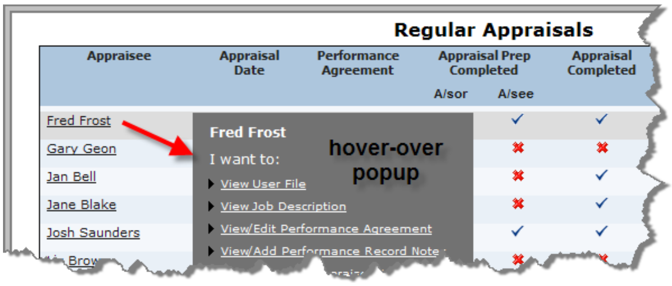
There are **2 areas** in which you can view your “Appraisees”. The default page will be your Appraisor home page “My Team’s Appraisals”, or dashboard view. On this page the names of your direct reports (“subordinates”) will appear in the dashboard, also showing the status of their appraisals. The other location is found by clicking on Appraisals, then select Appraisal Manager.

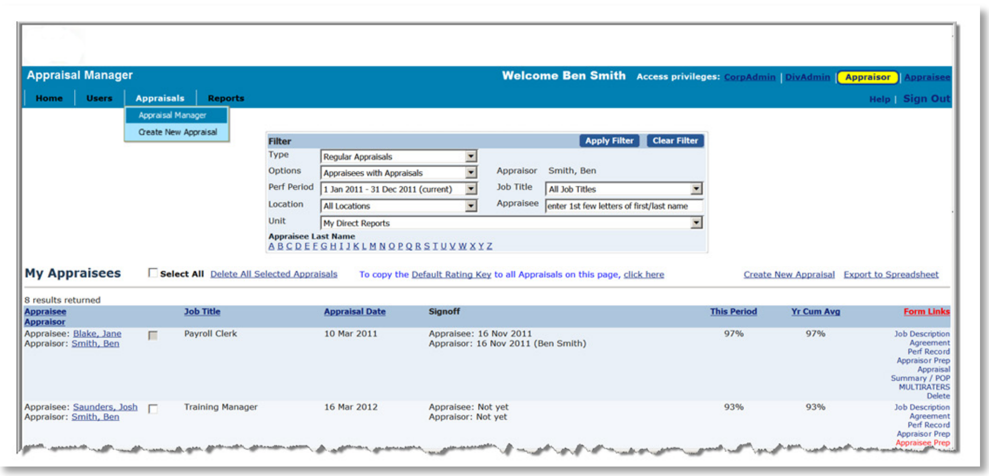
See screenshots below:
Dashboard View



Appraisor Role>>Appraisals>>Appraisal Manager View

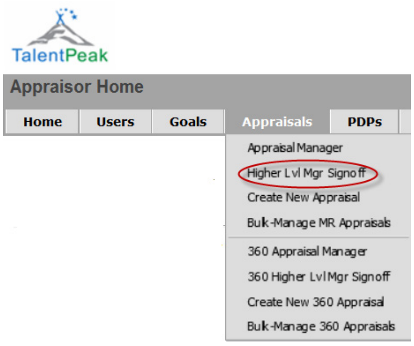
NOTE: The Appraisor home page dashboard is another easy way to view the status of employee appraisals, and to access their various appraisal forms via the links in the hover pop-up that shows when putting your cursor over an Appraisee’s name:





Higher Level Manager Views for Appraisors in Appraisal Manager

To View, click the “Appraisor” role-link (this link will now be highlighted yellow).

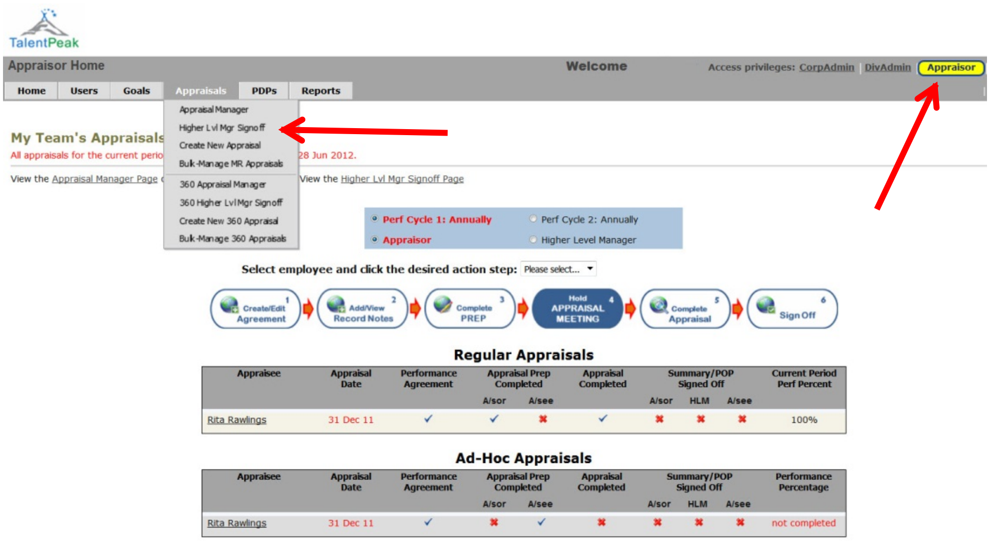


In their Appraisor role, managers will now have a further page in the menu bar dropdown list, called **Higher Lvl Mgr Signoff.**

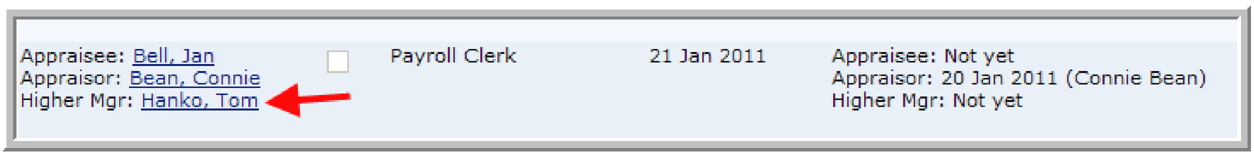
(See next section regarding Higher Level Manager Signoff. Please note this is not viewable unless you are in the **Appraisor Role**. This information is also included in the TalentPeak™ Appraisor User Guide)

All Appraisal Manager pages in the system will also show the HLM as in the screenshot snippet below.

Appraisals>>Higher Level Manager Signoff (Appraisor Role)

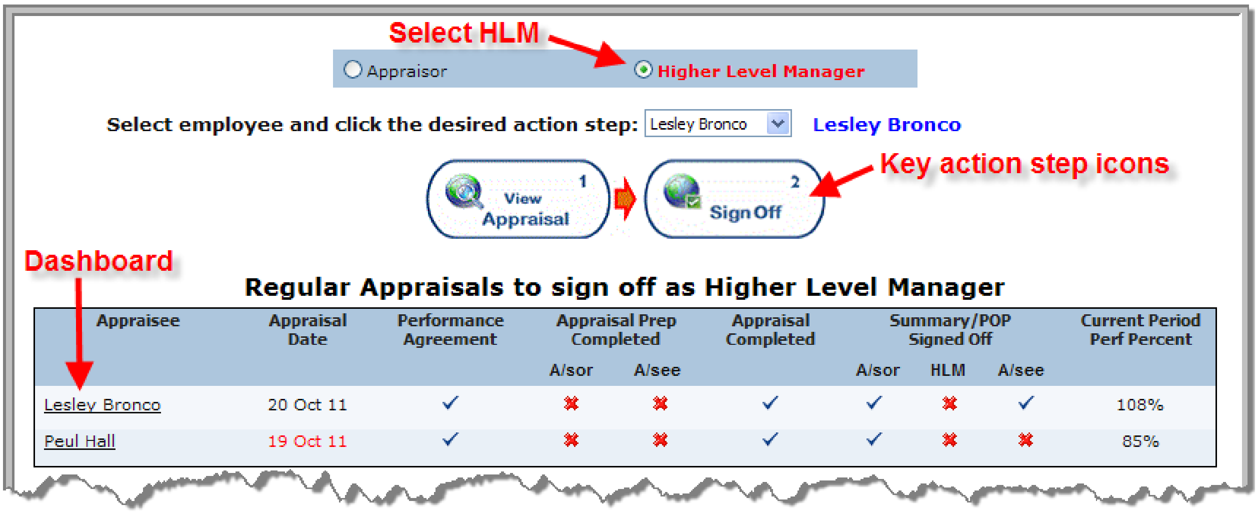


All Appraisal Manager pages in the system will also show the HLM as in the screenshot snippet below.



Appraisor Home Page View

A list of all appraisals that a manager needs to sign off as HLM, shows on the Appraisor home page (select the Higher Level Manager radio button at the top).



Appraisee	Appraisal Date	Performance Agreement	Appraisal Prep Completed A/sor	Appraisal Prep Completed A/see	Appraisal Completed	Summary/POP Signed Off A/sor	Summary/POP Signed Off HLM	Summary/POP Signed Off A/see	Current Period Perf Percent
Lesley Bronco	20 Oct 11	✓	✗	✗	✓	✓	✗	✓	108%
Peul Hall	19 Oct 11	✓	✗	✗	✓	✓	✗	✗	85%

The Summary/POP Form will now also show a general comments field and signoff link for the HLM.

NOTE: With a specific HLM assigned to an Appraisee, only this HLM will have access to this field and signoff link. When the "No HLM" box is ticked in a User File, this HLM comments field will not show.

Higher Level Manager Frequently Asked Questions (FAQ) –Signing Off a 3 Level

Question: How do I sign off as Higher Level Manager (HLM) in a system that has been set up with 3-level signoff?

(a) When you are specifically assigned as HLM to an employee (in his/her User File)

In your Appraisor role, go to the **Higher Lvl Mgr Signoff** page, where you can access the appraisal forms of all those employees you are assigned to as HLM. Click on the **Summary/POP** link (far right of screen) of those employees whose appraisals you want to sign off.

When you are specifically assigned as HLM, nobody but you will be able to access the HLM general comments field and signoff link on a Summary/POP Form.

This general comments and a signoff link will be active only once the employee's Appraisor (normally direct line manager) has signed off.

Once you have signed off, the Appraisee's own general comments field and signoff link will become active (which only they can access).

NOTE: The Appraisee cannot access the Official Appraisal or Summary/POP forms until the HLM has signed off.

(b) With NO specific HLM assigned to an Appraisee

In your Appraisor role, select **Appraisals >> Appraisal Manager**. In the filter, click the UNIT dropdown arrow. This will list all the sub-units under your "jurisdiction". Select the sub-unit of the person whose appraisal you wish to sign off as HLM. His/her appraisal will show in the list of appraisals that come up. Now click on the **Summary/POP** link (far right of screen) of this employee to enter your general comments and sign off electronically.

NOTE: Check with your CorpAdmin what the organization's policy is regarding WHO should sign off as HLM, as TalentPeak allows ANY manager in the "chain of command" above an employee to do so (as can a Corp- or DivAdmin for further flexibility). The system keeps track of who actually signed off by listing his/her name along with the signoff date on the Summary/POP Form, as well as on the Appraisal Manager page.

(c) Corp- or DivAdmin signoff as HLM

By NOT assigning a specific HLM to employees (in their User Files), system administrators can also fulfill this role. Go to **Appraisals >> Appraisal Manager** to access the **Summary/POP** links of employees**.**

Question: What is the 3-level signoff sequence?

The signoff sequence is: **(1) Appraisor (2) HLM (3) Appraisee**

It is important to have the Appraisee signing off last, as that then "locks" the appraisal so that the Appraisor and HLM (Higher Level Manager) cannot go back and change the contents of the appraisal and their final comments afterwards - with the appraisee potentially unaware of this.

This sequence is the only one that guarantees the Appraisee's protection and peace of mind that nothing can be changed after their signoff. Even if an Administrator should UNDO all the signoffs, the Appraisee has to sign off (last) again

NOTE: The Appraisee cannot access the Official Appraisal or Summary/POP forms until the HLM has signed off.

Question: How should 3-level signoffs be handled with appraisal disputes?

Disputes should be handled first, before the Appraisee (and Appraisor for that matter) signs off.

Disputes will generally come up DURING the appraisal interview, even before the Appraisor signs off. In other words, an Appraisee will/should NOT see the area of disagreement the first time when logging on AFTER the Appraisor has signed off.

So the best-practice sequence is:

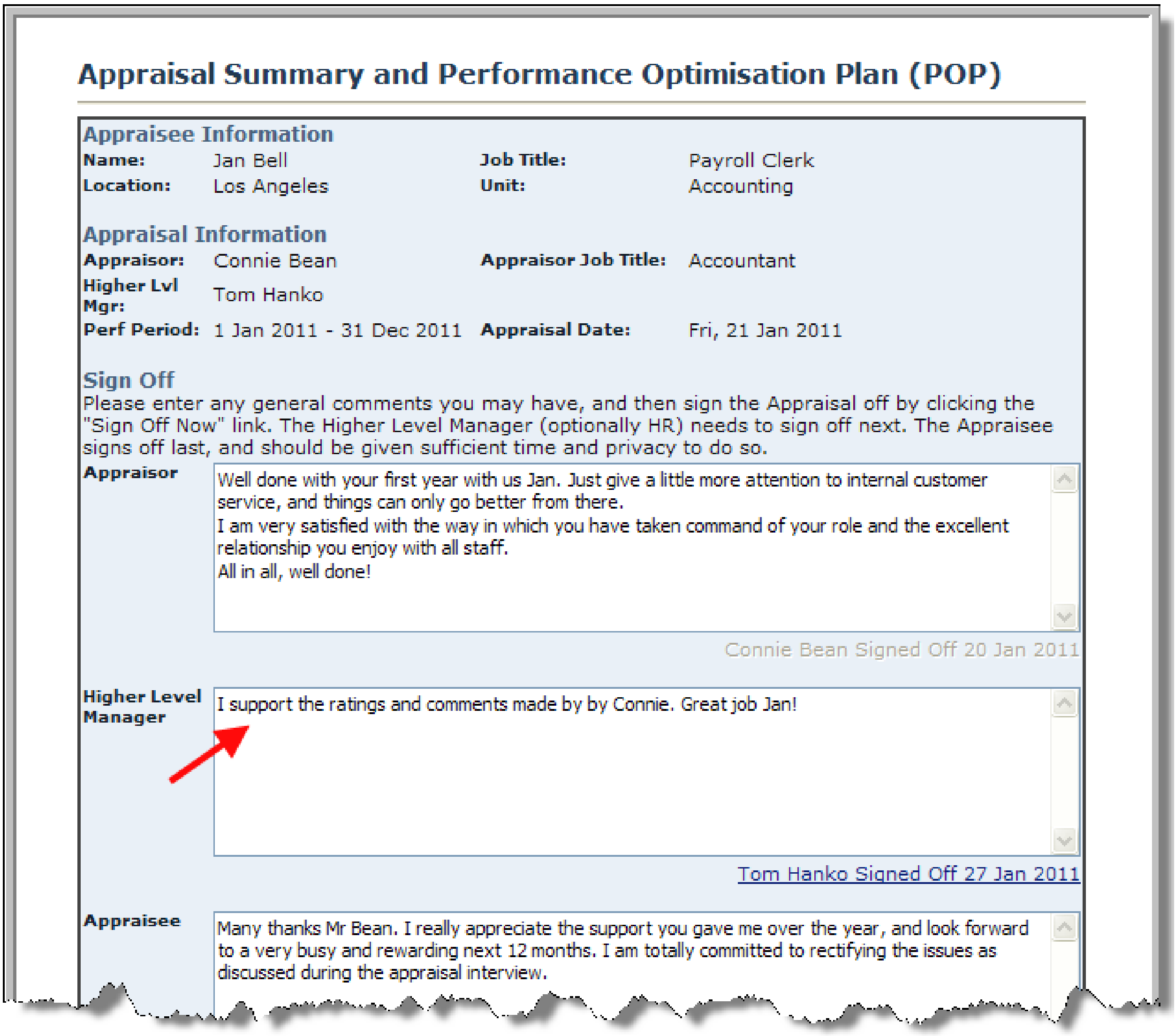
1. Area of dispute identified during appraisal interview (Appraisor and Appraisee cannot resolve).
2. Higher Level Manager (HLM) or HR is brought in to mediate/facilitate (or make) final decision.
3. Appraisor enters result of appraisal on Appraisal and Summary/POP Forms, enters overall comments, and signs off.
4. HLM/HR enters notes re disagreement and solution on Summary/POP Form (if necessary for record purposes), and signs off.
5. Appraisee views contents of the Appraisal Form as well as the comments entered by the Appraisor and HLM onto the Summary/POP Form.
6. Appraisee enters own final comments and signs off. This "locks" the Appraisal and Summary/POP Forms so the Appraisor and HLM cannot make any further changes to it.

This sequence is the only one that guarantees the Appraisee's protection and peace of mind that nothing can be changed after his/her signoff. Even if an Administrator should UNDO all the signoffs, the Appraisee has to sign off (last) again.

Question: What should be done if the Appraisee refuses to sign off the appraisal?

You should obviously try to first resolve any differences in opinion as explained previously. However, should that fail, and you persist in your view regarding the performance of the Appraisee, we recommend you note this accordingly in the Summary/POP Form (i.e. what you did to resolve the issue, but that the Appraisee still refuses to sign the appraisal off). The system does not FORCE an Appraisee signoff.

Summary/POP Form View



Appraisal Summary and Performance Optimisation Plan (POP)

Appraisee Information

Name:	Jan Bell	**Job Title:**	Payroll Clerk
Location:	Los Angeles	**Unit:**	Accounting

Appraisal Information

Appraisor:	Connie Bean	**Appraisor Job Title:**	Accountant
Higher Lvl Mgr:	Tom Hanko		
Perf Period:	1 Jan 2011 - 31 Dec 2011	**Appraisal Date:**	Fri, 21 Jan 2011

Sign Off

Please enter any general comments you may have, and then sign the Appraisal off by clicking the "Sign Off Now" link. The Higher Level Manager (optionally HR) needs to sign off next. The Appraisee signs off last, and should be given sufficient time and privacy to do so.

Appraisor

Well done with your first year with us Jan. Just give a little more attention to internal customer service, and things can only go better from there.
I am very satisfied with the way in which you have taken command of your role and the excellent relationship you enjoy with all staff.
All in all, well done!

Connie Bean Signed Off 20 Jan 2011

Higher Level Manager

I support the ratings and comments made by by Connie. Great job Jan!

Tom Hanko Signed Off 27 Jan 2011

Appraisee

Many thanks Mr Bean. I really appreciate the support you gave me over the year, and look forward to a very busy and rewarding next 12 months. I am totally committed to rectifying the issues as discussed during the appraisal interview.

Automated Email Samples

Email sent to HLM on Appraisor Signoff

Dear Tom Hanko

The Appraisor, Ben Smith, has now signed off the appraisal of the Appraisee, Jan Bell.

You are the assigned Higher Level Manager (HLM) for this Appraisal, and it is now ready for your review and signoff.

Please log onto the performance appraisal system and follow these steps:

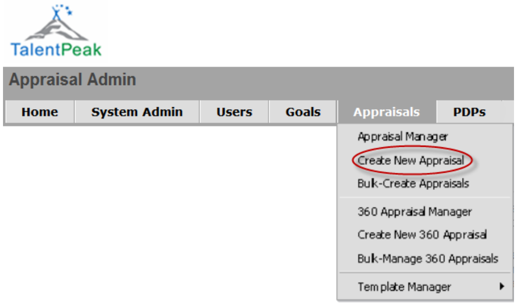
(1) Click on your 'Appraisor' role-link top right of the screen
(2) Go to Appraisals >> Higher Lvl Mgr Signoff
(3) Find the name of the Appraisee (mentioned above) to access his/her appraisal links on the far right
(4) Click the 'Summary/POP' link to view the final comments made by the Appraisor. Then enter your own general comments as Higher Level Manager, and sign the appraisal off.

Your purpose as HLM is to approve the Appraisal as completed by the Appraisor, so please discuss anything you need clarified or changed with him/her first before signing the appraisal off.

NOTE: This is a system-generated email, so please do not reply to it. Contact your Appraisor if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).

Automated email sent to Appraisee on HLM Signoff

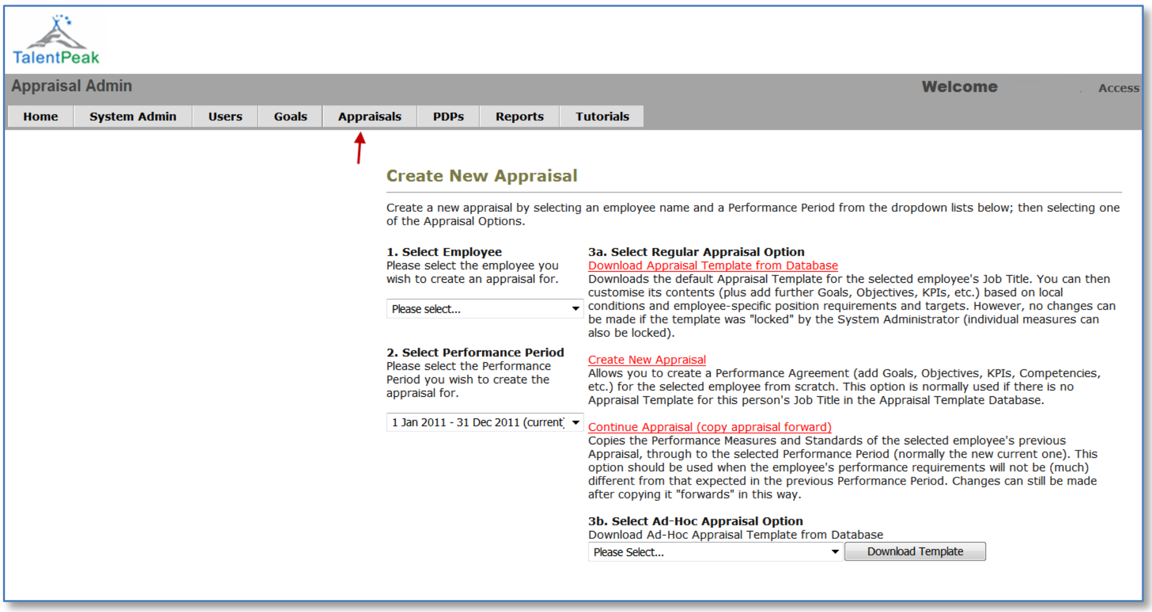
> Dear Jan Bell
>
> Your manager/supervisor (Appraisor) has now signed off your Performance Appraisal, and it is now ready for your review and sign-off.
>
> Please log onto the performance appraisal system and review the results of your appraisal as entered by your Appraisor.
>
> Follow these steps:
> (1) Go to Appraisal >> Appraisal Manager, and click on the 'Appraisal' link to review what your Appraisor has entered onto your Official Appraisal Form (as discussed during the Appraisal Interview). If necessary, ask him/her about anything you believe that does not accurately reflect what you have discussed during the interview (and may need to change).
> (2) Next, click on the 'Summary/POP' link to view the final appraisal results, and comments made by your Appraisor. Then enter your own general comments, and sign off on the appraisal.
>
> NOTE: This is a system-generated email, so please do not reply to it. Contact your Appraisor if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).

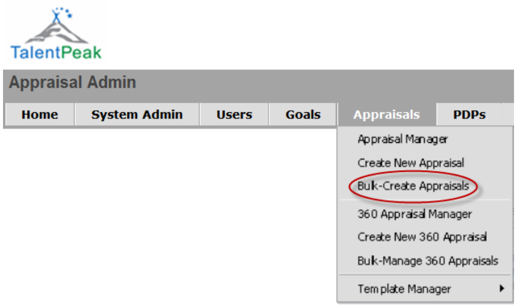


Appraisals>>Create New Appraisal

CorpAdmin Organizational View – Create Appraisal link

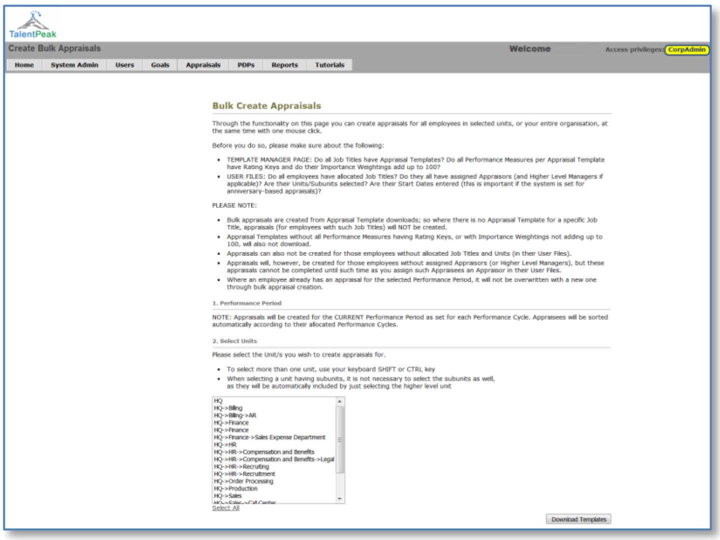
Please see the **TalentPeak™ Appraisor User Guide** for other views and information; also refer to the Tutorial step by step Section in this Guide.



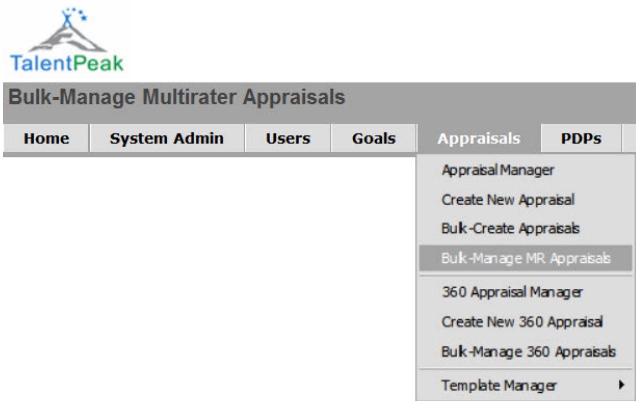


Appraisals>>Bulk Create Appraisals

CorpAdmin Organizational View – Bulk Create Appraisals link
Through the functionality on this page you can create appraisals for all employees in selected units, or your entire organization, at the same time with one mouse click.

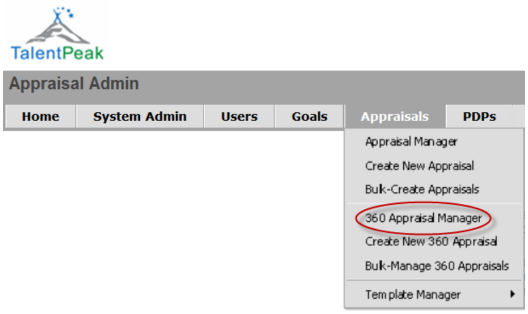


Please see the **TalentPeak™ Appraisor User Guide** for other views and information; also refer to the Tutorial step by step Section in this Guide.



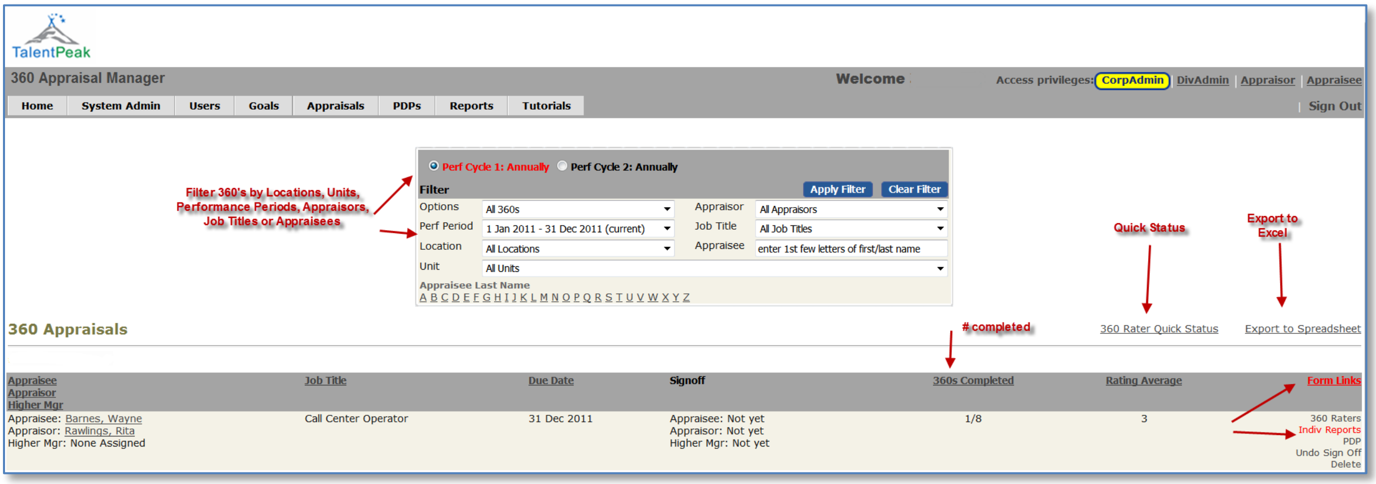
Appraisals>>Bulk Create Multirater Appraisal

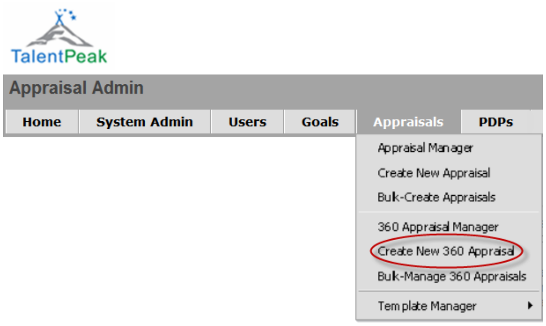
Please refer to the Multirater Section in this Guide.



Appraisals>>360 Appraisal Manager

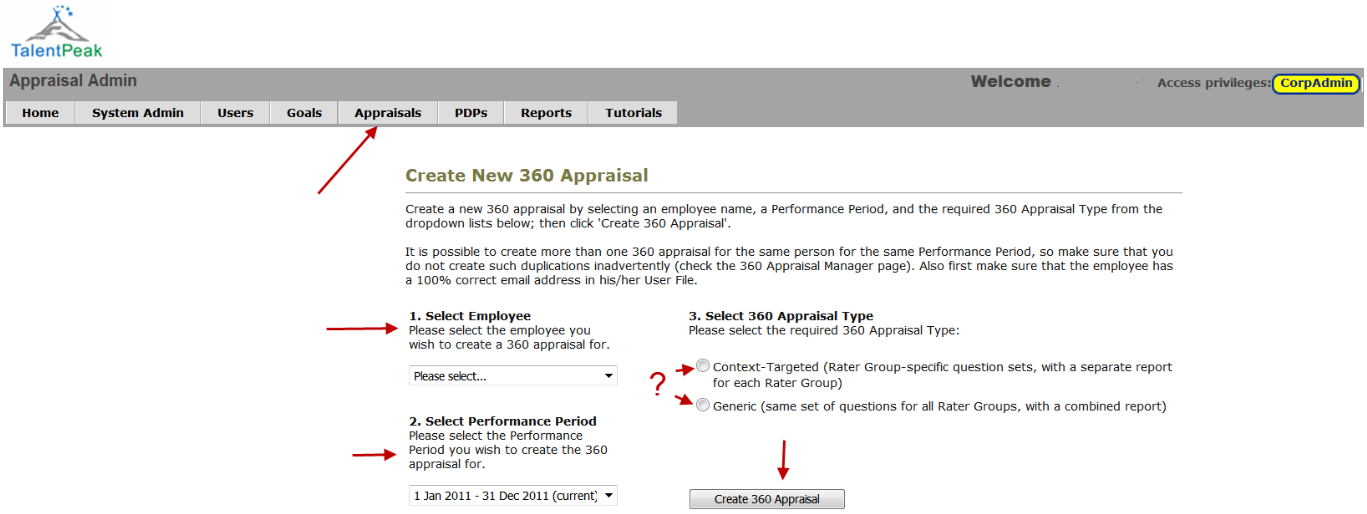
CorpAdmin View of all of the organizations' 360's with the ability to filter views, export data and access form links. (Similar to Appraisal Manager, but only contains 360 information)

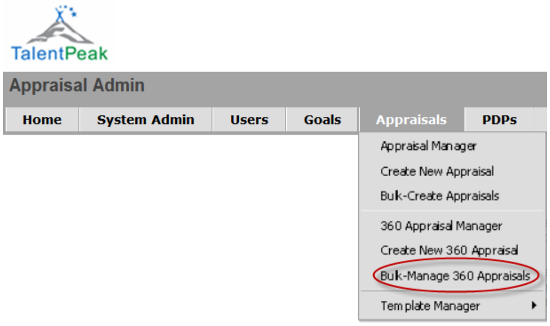




Appraisals>>Create New 360 Manager

Reference the Compass360™ Section of this Guide for detailed information.

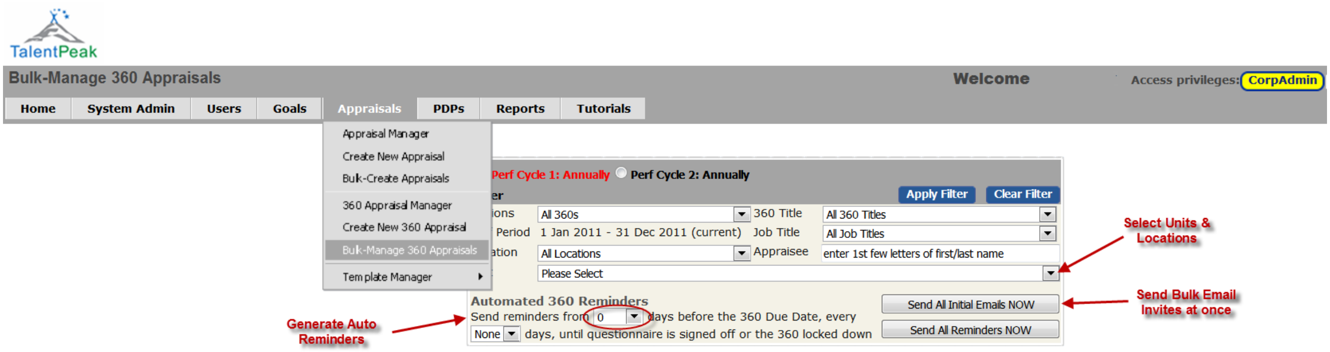


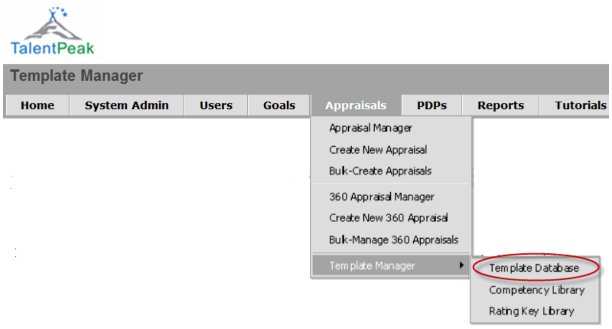


Appraisals>>Bulk Manage 360 Appraisals

Send out email invitations in bulk; schedule auto-reminders or one time reminders.

Reference the Compass360™ Section of this Guide for detailed information.





Appraisals>>Template Manager>>Template Database

The system has four sub-databases/libraries:

- Appraisal Templates (Template Database)
- Competency Library
- Rating Key Library
- Job Description Template Library

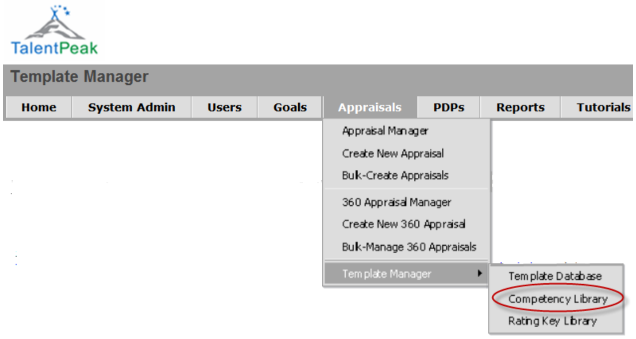
Appraisal Template Database

The ability to create Appraisal Templates in the system for the various roles/positions in your organisation solves the age-old problem of employees with the same Job Title and job contents getting quite different Performance Measures and Standards to perform to, due to them having different line managers and/or being at different locations.
The answer is to have a generic Appraisal Template drawn up by job content experts (JCE's) for each distinctly different role/position (Job Title) in the organisation, and to then make these templates available in a database from where they can be downloaded by line managers for their direct reports, irrespective of where they are located (even internationally). This prevents the reinvention of the wheel everywhere. It also ensures the standardisation of work expectations for the same role where relevant, and a consequently much fairer performance management system.

Once downloaded for specific employees, such Appraisal Templates can still be adapted to suit specific local conditions and employee-specific position requirements and targets - so they need not be inflexible or fully prescriptive. However, System Administrators have the ability to "lock" entire templates (or individual measures) so that they cannot be edited once downloaded by line managers (Appraisors) for specific employees (so as to ensure that exactly the same measures and standards are used throughout the organisation for the same role).

JCE's are typically exemplary performers in these roles, their line managers, and HR staff (developing such templates in task forces of 2 to 5 members). The process of developing Appraisal Templates is similar to doing a Job Analysis when developing Job/Role Descriptions and Person Specifications, and should ideally be developed during the same Job Analysis session. Alternatively, use existing Job Descriptions and Person Specifications as primary sources for deriving relevant Performance Measures to include in Appraisal Templates.

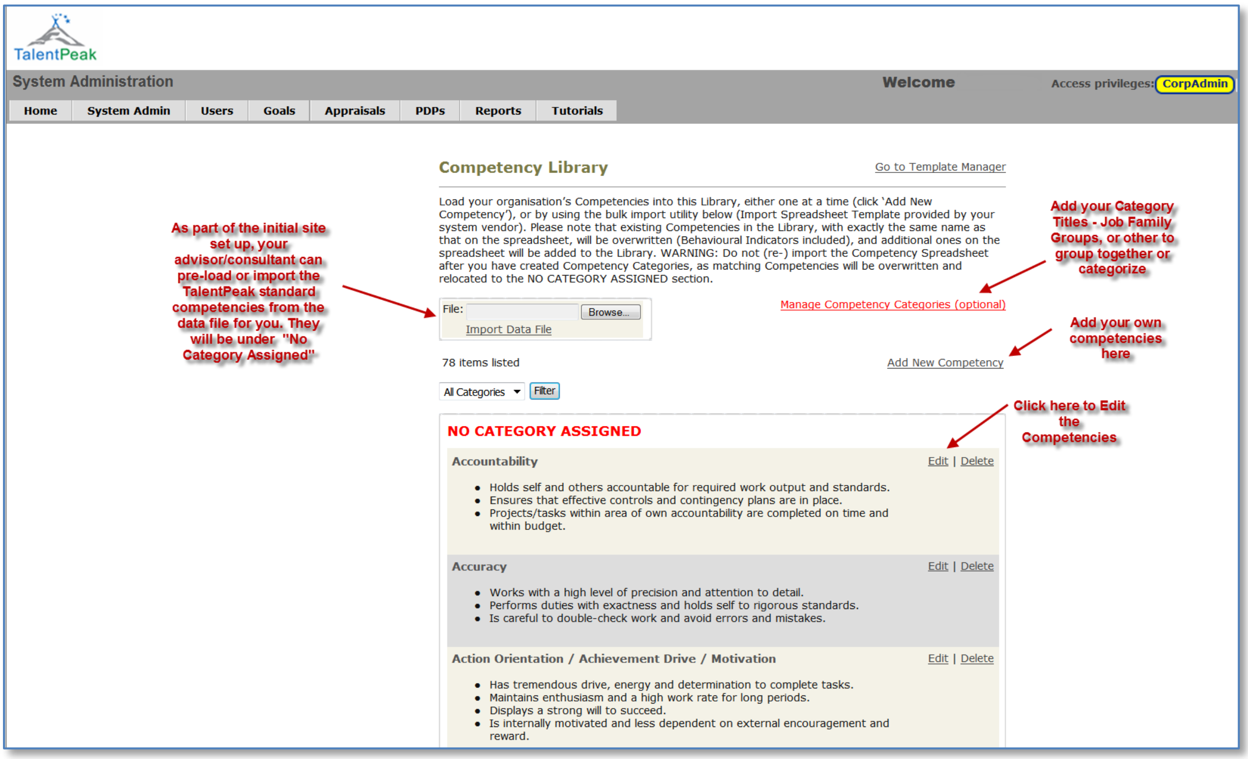
It is recommended that Appraisal Templates be reviewed at least annually.
NOTE: Appraisal Templates for all roles are not compulsory. Performance Agreements can be created for employees from scratch, without the use of Appraisal Templates (e.g. Appraisal Templates for Senior Management may not be appropriate).



Appraisals>>Template Manager>>Competency Library

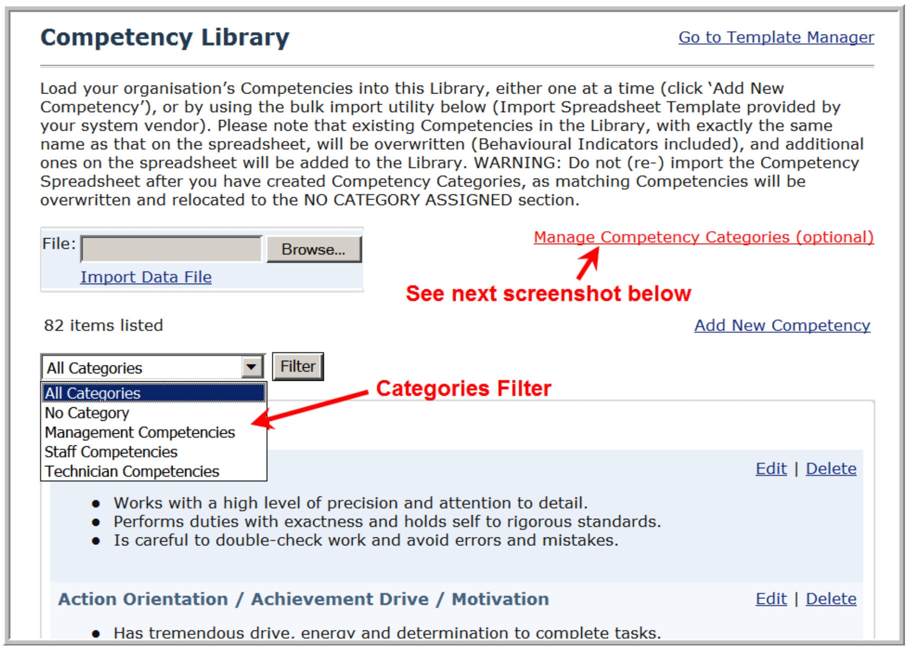
Import Generic Competencies

Add your competencies into this library, or ask us to import our set of around 80 generic competencies, which you can edit as you please (or ask us for the WORD list first). These competencies can be downloaded into Job Descriptions, Performance Agreements or Appraisal Templates. ([Refer to Competency Library in Knowledgebase)]

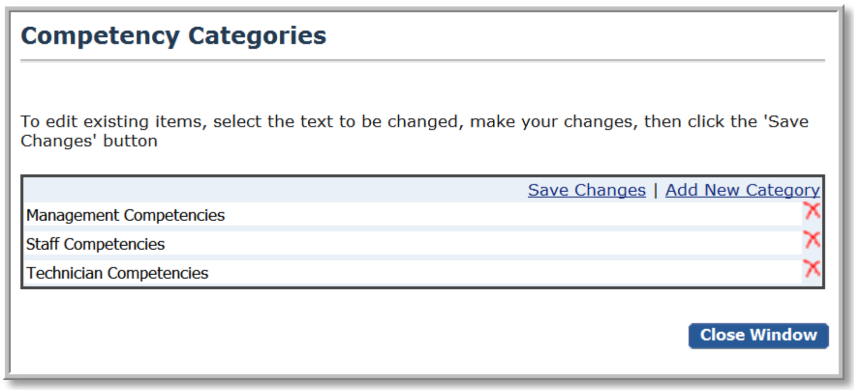


Competency Library Categories (Optional use)

An option available is to elect to create “Categories for Competencies” that will permit you to “bucket or group” competencies for an easier method to add to Appraisal Templates. If Categories are not created, the competencies would be added one by one. To use the “Category title” option, you would want to consider creating “broader” category titles that would be the same for a “Job Family Group”. For example, on your “Manager Appraisal Template” with all management employees having the same competencies; you would create a Category Title for “Management Competencies” and then associate all of those competencies into one group or category.

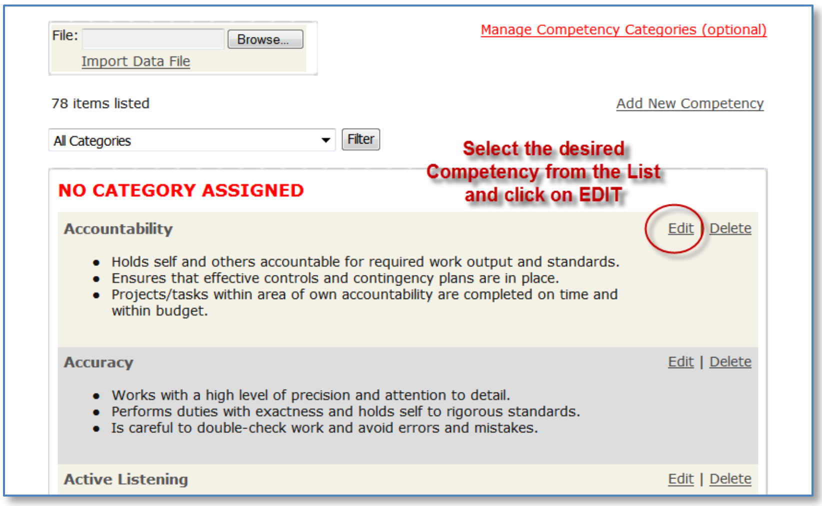


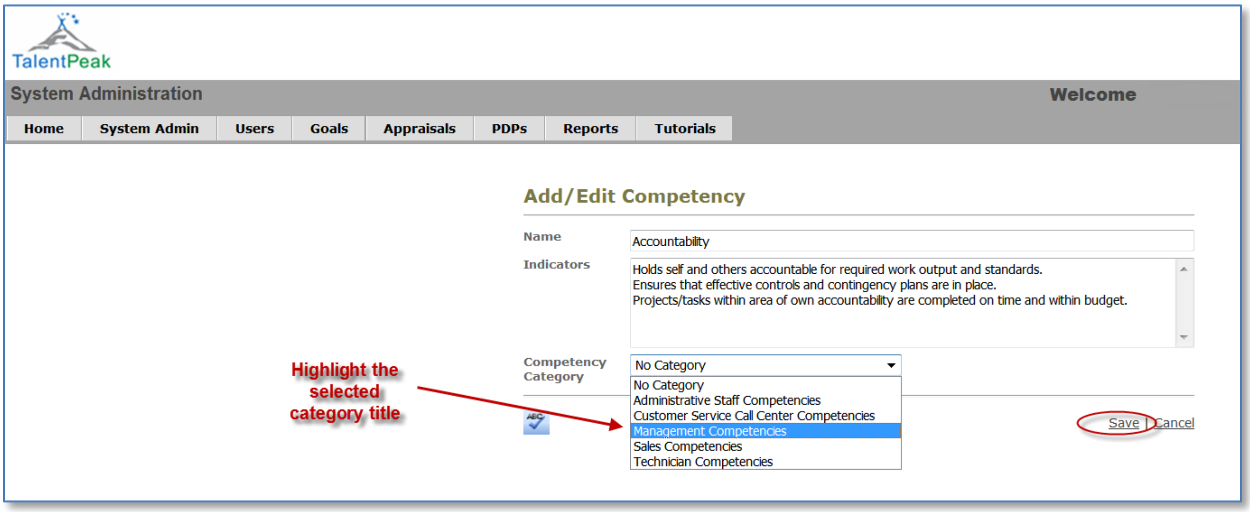
When you click the link **Manage Competency Categories** (optional) the following pop-up shows, where you can add your required Competency Categories:



The categories show as red bold headings:

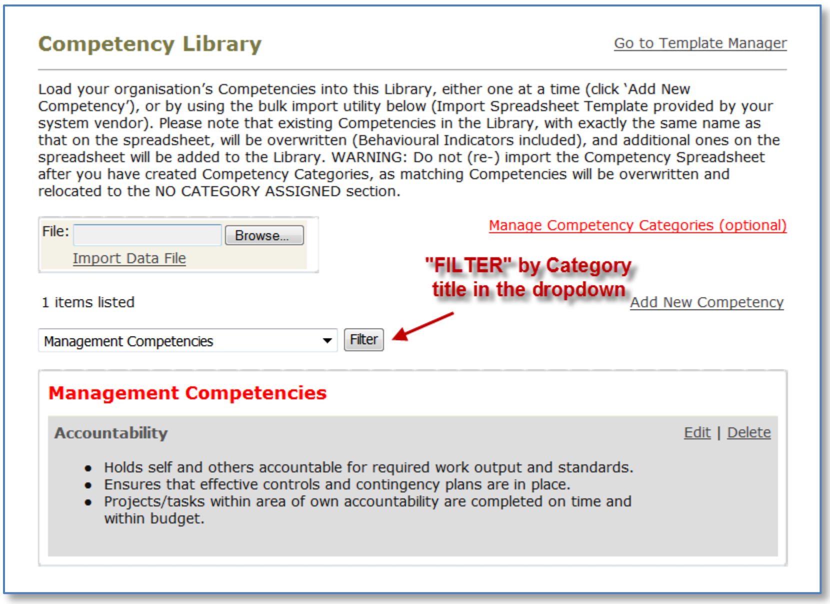
Assigning Competencies to categories:





Viewing the Competencies by Categories

View the competencies by category using the "Filter feature". Select the category title, and then click on "Filter". It will bring up all competencies that you have added to that category.



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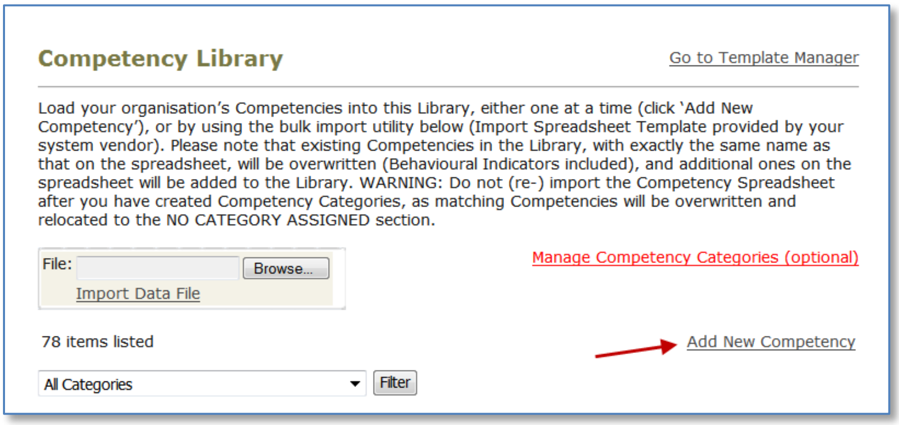
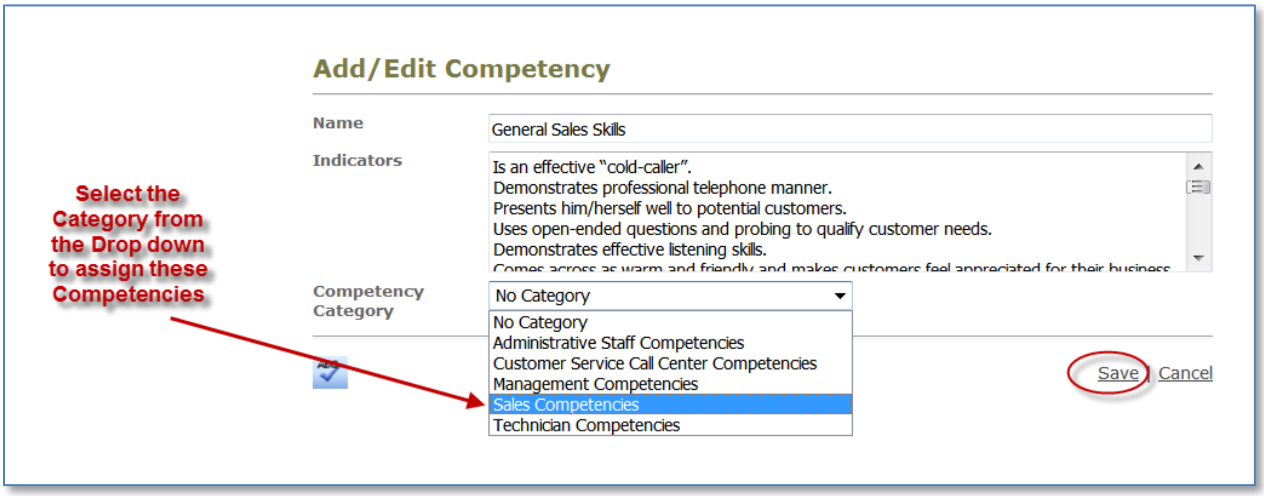
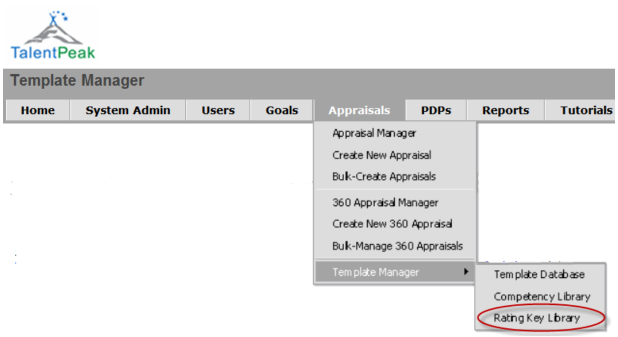
Add New Competency



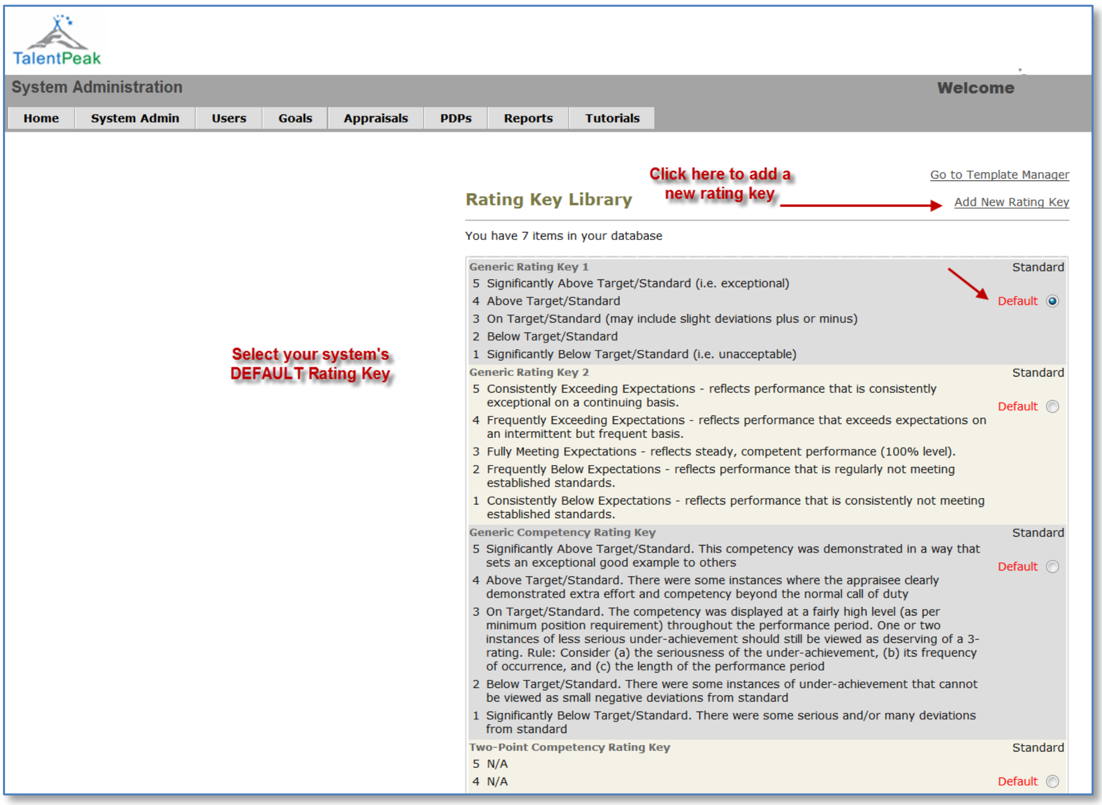


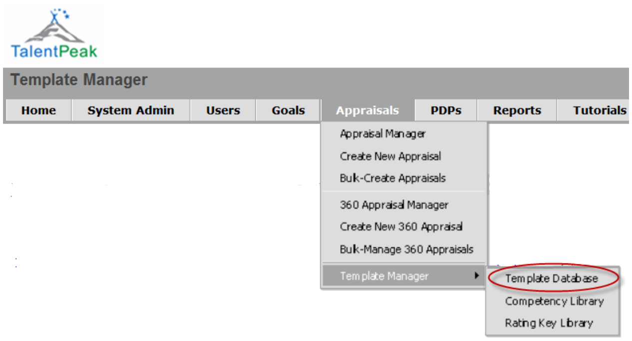


Appraisals>>Template Manager>>Rating Key Library

Rating Key Library

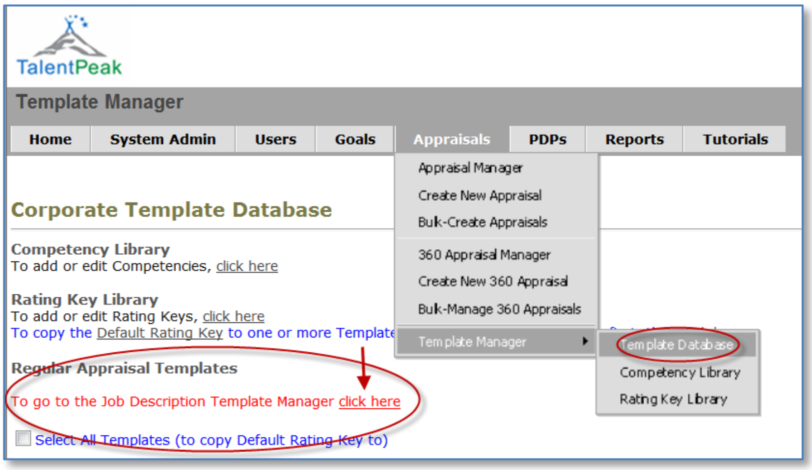
This library contains five standard "non-editable" Rating Keys, which can be downloaded into Performance Agreements and Appraisal Templates. You can also add your own Rating Keys to this library. Please remember that the 3-rating level should always represent the acceptable/expected performance level, i.e. "On Target/Standard", "Meeting Expectations" (representing 100% achievement). If you want your managers to only use your own uploaded Rating Key, indicate this as follows in the Rating Key Title, e.g.: Apex Healthcare Rating Key. You can also select a Default Rating Key which will automatically download as you create new Performance Measures in Appraisal Templates or Performance Agreements. (Refer to Rating Key Library in Knowledgebase)





Appraisals>>Template Manager>>Job Role Descriptions

This functionality needs to be specifically **activated in System Settings**. (See Settings Job Descriptions) Performance Measures and Standards (including Competencies) can be transferred from a Job Description to its corresponding Appraisal Template (for perfect alignment between them).



For Step by Step instructions, please go to the chapter on **TalentPeak® JD Builder** Section in this CorpAdmin Guide. To go to your template manager, click the red titled link as shown here. Read the Tutorial on the Job Description Template Manager page for detailed instructions on its use. Also consider asking us to give you on online demonstration on the creation of Job Descriptions in the system; or access our outsourced services to add for you.

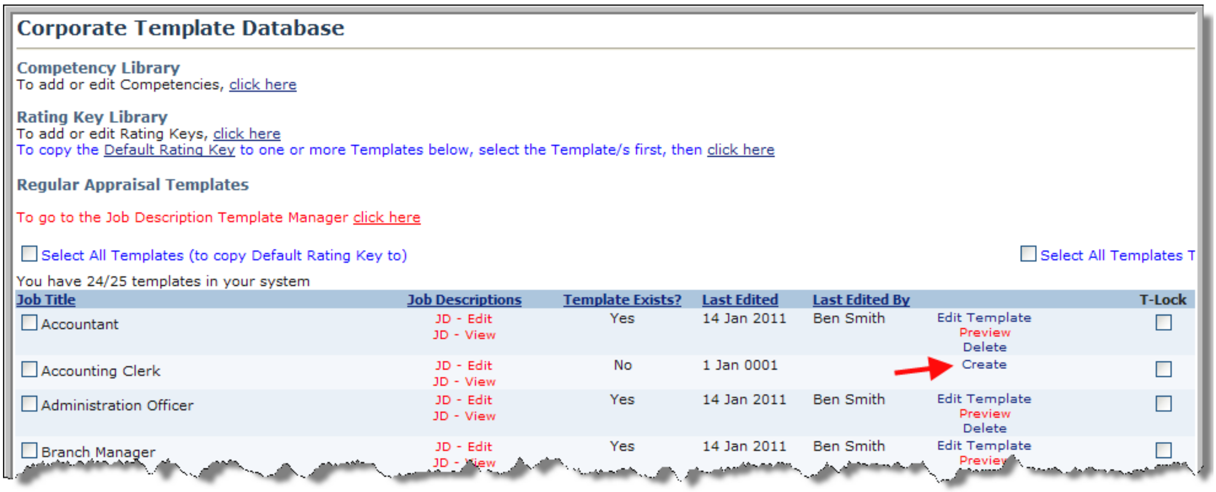
(Refer to Job/Role Descriptions in Knowledgebase)

STEP BY STEP TUTORIAL

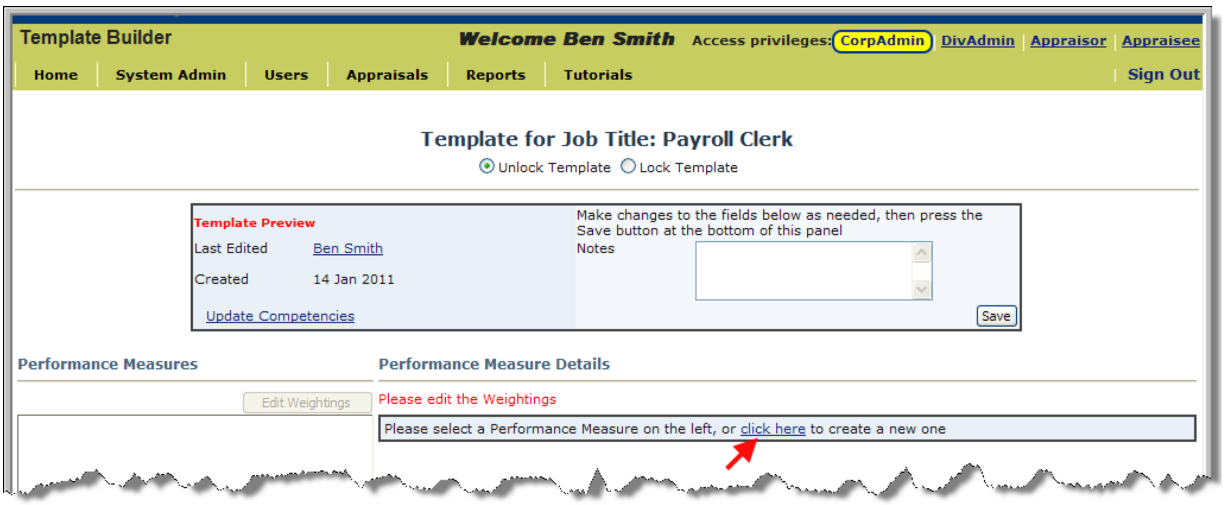
Creating Appraisal Templates

Let's now get some hands-on practice in creating Appraisal Templates (on the Template Database Page).

Please select a Job Title of one of your direct reports (if you have any). Otherwise, any Job Title will do. Click "Create" next to that Job Title on the far right.



The next view shows (example: Payroll Clerk role):

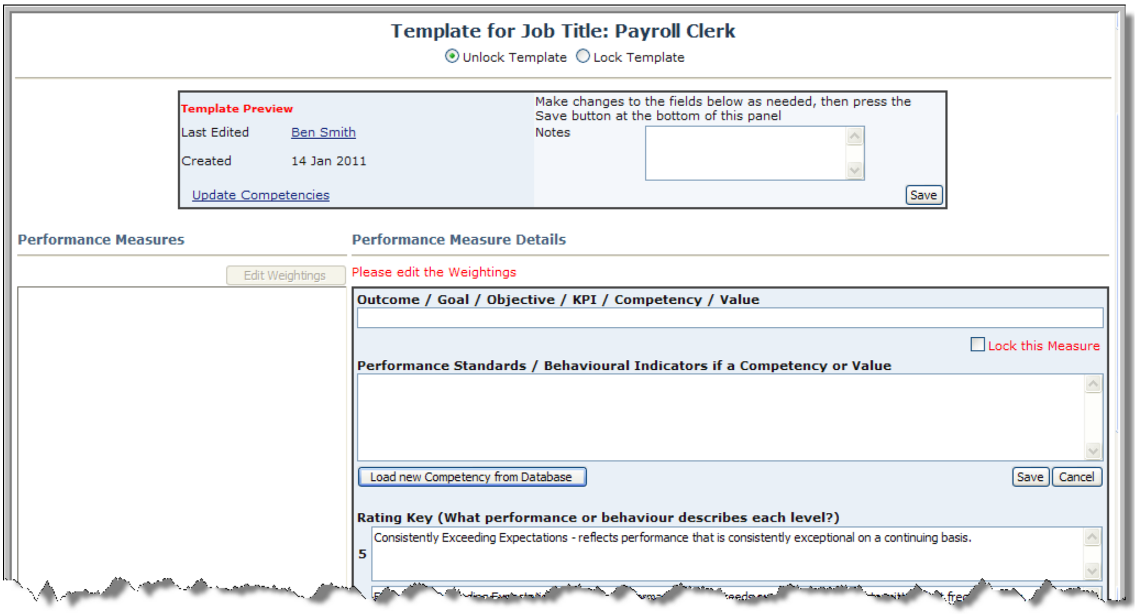


Enter any relevant notes in the Notes field, such as the names of the Task Force members that have developed the measures.

Now click: "Please select a Performance Measure on the left, or click here to create a new one" ("click here")

This will open the following section on the right side of the page. Note that if a Default Rating Key was selected, this will now load automatically. The (3-level) blue border indicates the minimum expected level of performance ("On Target/Standard", or "Meeting Expectations"):

NOTE: If you want **ALL Template measures to be locked**, and not give managers the ability to edit anything in a downloaded Template, or add any additional measures, it is not necessary to lock the individual measures. Just tick the T-Lock tick-box for that Template (see column of T-Lock tick-boxes on the far right-hand side on the Template Manager page). The text of all measures will remain black with the entire Template locked this way.



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MINI TUTORIAL: What does the term "Performance Measure" mean?

Performance Measures are by definition any of the following:

- **Goals** (e.g.: "Increase company market share to 35% by year "x")
- **Objectives** (e.g.: "Implement a new accounting system by "x" date")
- **Key Performance Indicators (KPIs)** (e.g.: Sales, Customer Satisfaction Index, Net Profit, ROI)
- **Competencies** (e.g.: Accuracy, Communication, Leadership, Selling Skills)
- **Values** (e.g.: Customer Service Excellence, Teamwork, Integrity)

You should generally have anything from 3 to 6 Competencies per Job Title/Role, added to Goals, Objectives and/or KPIs for a total of, as a rule of thumb, not more than 15 Performance Measures in all.

Goals, Objectives and Performance Standards should be stated in GENERIC terms in an Appraisal Template (also in Job Descriptions), and then adapted for individual jobholders once downloaded into their Performance Agreements - to cater for specific local conditions and employee-specific role requirements and targets.

Example 1 - KPIs:
GENERIC in Template: "Achieve monthly sales targets as agreed with Sales Manager"
SPECIFIC in Agreement: "Achieve an average monthly sales turnover of $75,000"

Example 2 - Goals/Objectives:
GENERIC in Template:
Replace this item with any number of goals/objectives specific to the jobholder

- Add relevant performance standards per each goal/objective (due dates, quantities, quality, budget allocation, specs, expectations, etc.)
- Allocate an importance weighting for each goal/objective (Edit Weightings)

SPECIFIC in Agreement:
Goal 1: Complete Project A *(add performance standards & weighting)*
Goal 2: Complete Project B *(add performance standards & weighting)*

Goals, Objectives, and KPIs should be TYPED (or COPIED AND PASTED) into the first field top right of the template, while Competencies and Values can be DOWNLOADED from the Competency Library, if they were added there.

What are Performance Standards? Examples are: target dates, numbers/volumes to achieve, dollars to sell, percentages to achieve, quality levels to maintain, etc.

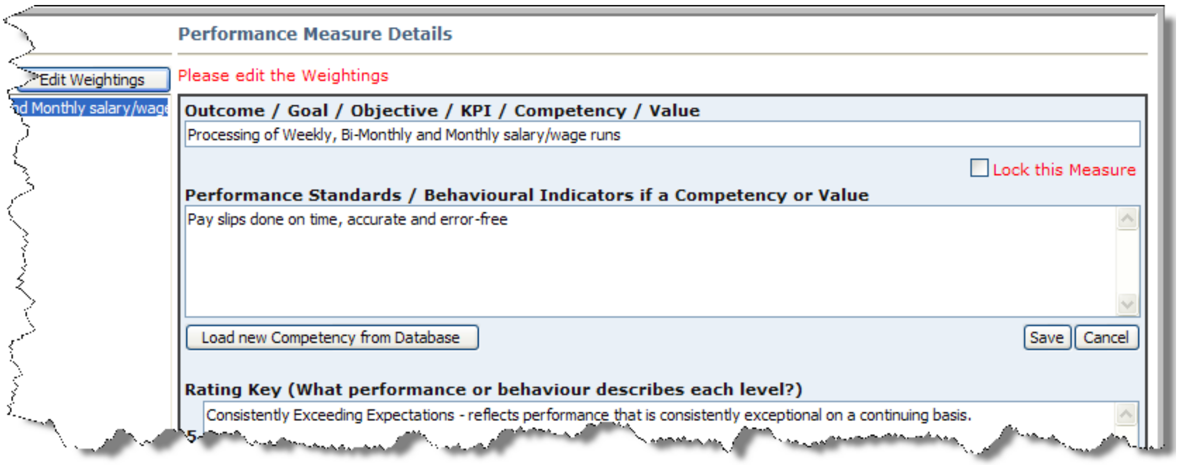
What are Behavioural Indicators? Key observable behaviours that describe a Competency or Value, e.g.: Speaks with authority and conviction (ORAL COMMUNICATION).

Consult the **User FAQs** Knowledgebase on the TalentPeak™ customer support website for more details on and examples of Goals, Objectives, KPIs, Competencies, and Values.

Adding Measures to the Appraisal Template

So let's proceed with adding measures to the Appraisal Template you have created, by adding an Objective with its relevant Performance Standard/s. These are added into the first two fields by typing or by copying and pasting from e.g. a Word document.

Example:

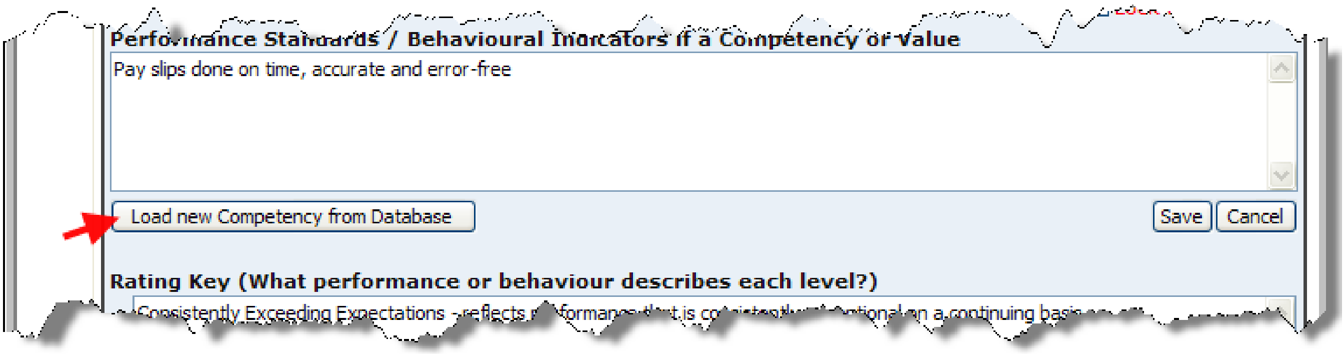


Click "Save" with every measure added.

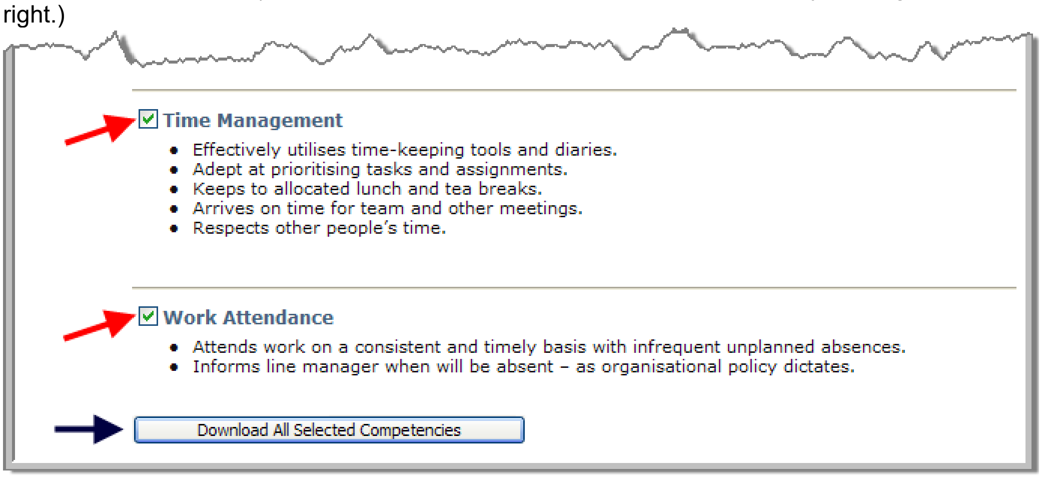
NOTE:
- The Performance Measures will keep "stacking up" in the box on the left of the page as you add them.
- Use the "UP" and "DOWN" arrows (and other available icons) bottom left of the page if you want to re-arrange the order of the measures.
- Performance Measures can also be transferred from Job Descriptions (JD Edit page) to Appraisal Templates.

After you have added all relevant Outcomes, Goals, Objectives and/or KPIs for the role (as explained above), then next, download the relevant Competencies (and/or Values) from the Competency Library.

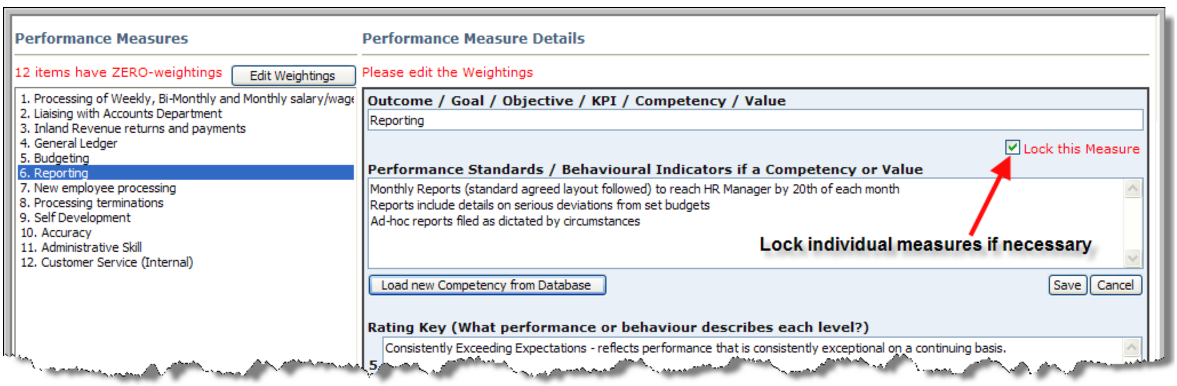
To do so, click the link: "Please select a Performance Measure on the left, or click here to create a new one" ("click here") again, and then click the button: Load new Competency from Database (find this button below the Performance Standards field – see screenshot below).



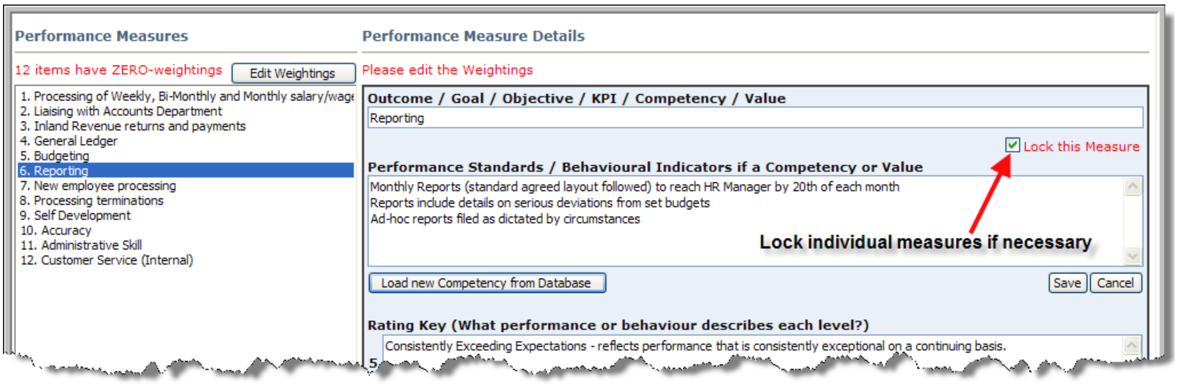
This will open the Competency Library. Select all the relevant Competencies/Values for the role (tick the boxes on the left of such Competencies), then go to the bottom of the page and click the button Download All Selected Competencies to download them into the template. (Individual Competencies can also be downloaded by clicking the link "Load this Competency" on the right.)



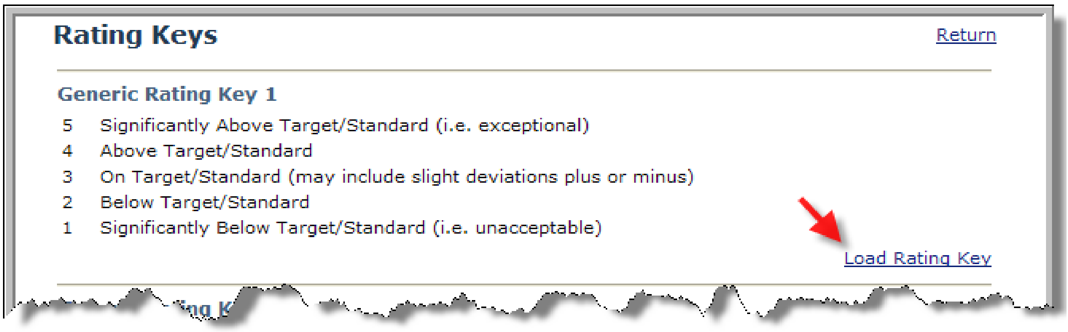
The template now looks as follows, with all measures showing on the left. Selecting a measure shows its details on the right.



Individual measures can be locked if you do not want managers to change them once the template is downloaded for their employees (see below).



If no Default Rating Key was set, you need to download a Rating Key for every measure added. To do this, click the button bottom of page Load Rating Key from Database, and then download an appropriate Rating Key (you can overwrite an incorrectly downloaded Rating Key with another one at any time). Note that you can have different Rating Keys for different measure types if you like.

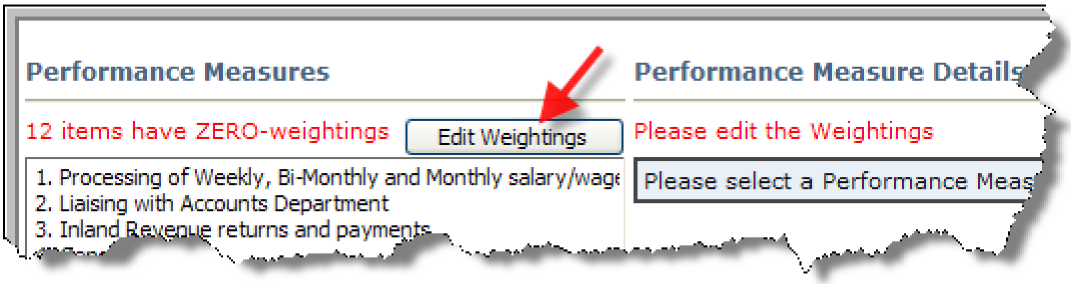


NOTE: If you have set a Default Rating Key it will download automatically with every new measure added, i.e. when you click: *"Please select a Performance Measure on the left, or click here to create a new one"*

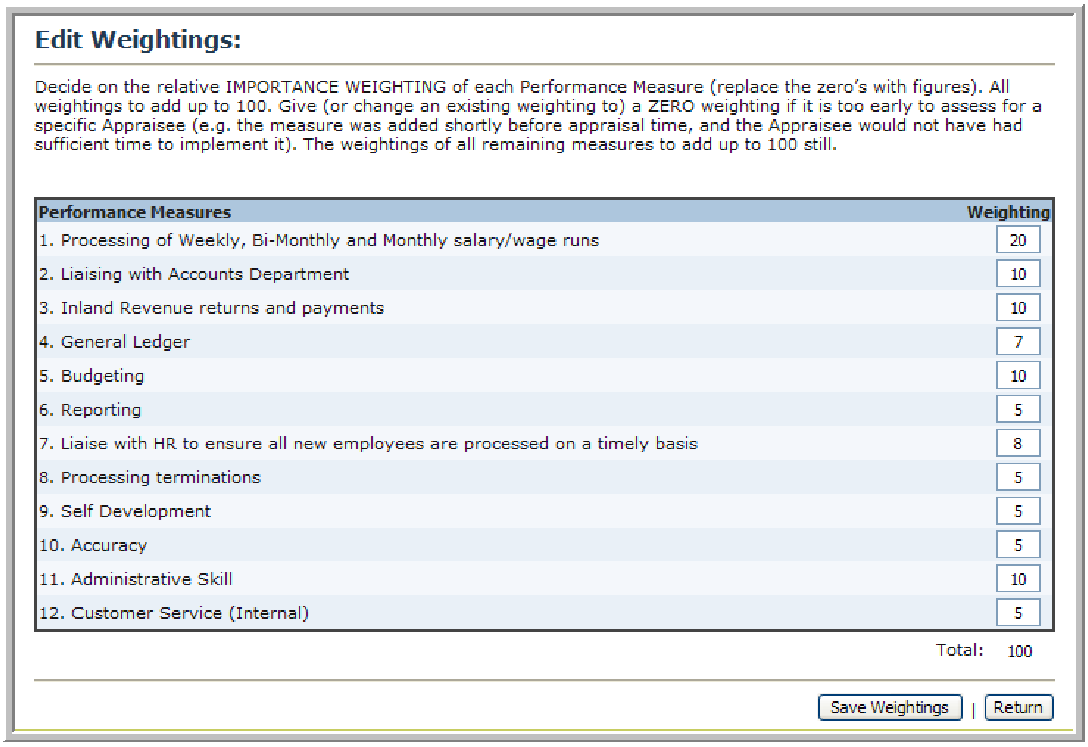
Edit Weightings (Refer to Weightings in Knowledgebase for more information)

After you have downloaded/entered all the required Performance Measures into the template, click the Edit Weightings button just above the Performance Measures box on the left

(NOTE: This button does not show if you have disabled the weightings and performance percentages in the system).



That takes you to the following page:



Edit Weightings:

Decide on the relative IMPORTANCE WEIGHTING of each Performance Measure (replace the zero's with figures). All weightings to add up to 100. Give (or change an existing weighting to) a ZERO weighting if it is too early to assess for a specific Appraisee (e.g. the measure was added shortly before appraisal time, and the Appraisee would not have had sufficient time to implement it). The weightings of all remaining measures to add up to 100 still.

Performance Measures	Weighting
1. Processing of Weekly, Bi-Monthly and Monthly salary/wage runs	20
2. Liaising with Accounts Department	10
3. Inland Revenue returns and payments	10
4. General Ledger	7
5. Budgeting	10
6. Reporting	5
7. Liaise with HR to ensure all new employees are processed on a timely basis	8
8. Processing terminations	5
9. Self Development	5
10. Accuracy	5
11. Administrative Skill	10
12. Customer Service (Internal)	5

Total: 100

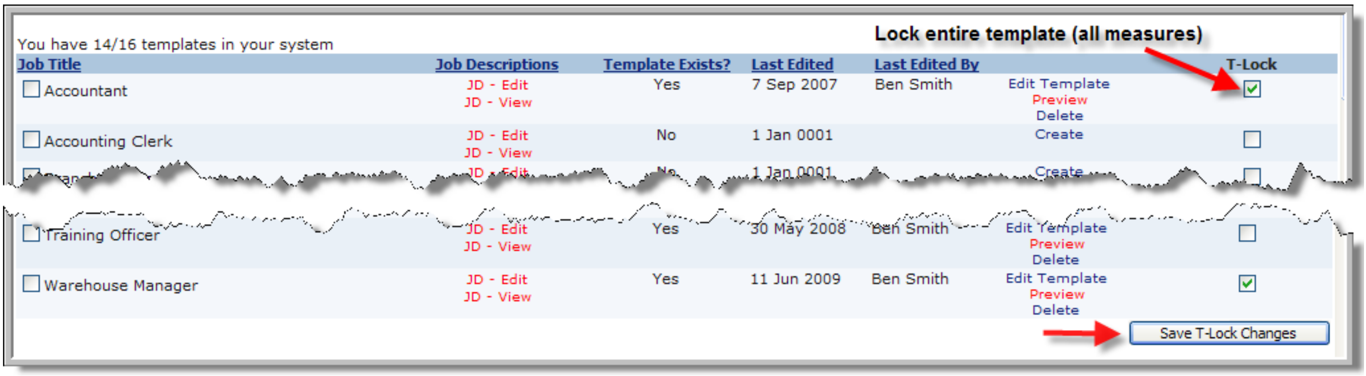
Save Weightings | Return

Read the Instructions. You need to give each Measure an importance weighting (replace the zero's with a figure), with all weightings adding up to 100. Then click Save Weightings (the weightings are added into the equation for calculating the eventual performance percentage).

When individual measures are locked, you also have the option to lock their respective weightings. This way, managers cannot change the details of a locked measure or its weighting.

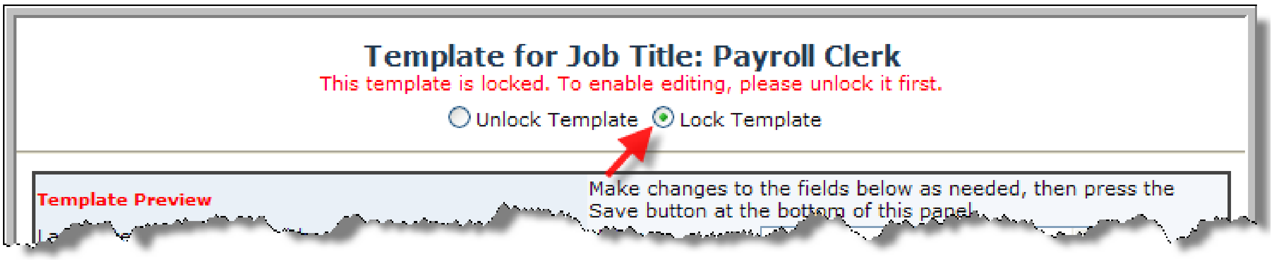
Other Template Manager Features

T-Lock = Template Lock. By ticking this box next to an Appraisal Template, the entire template gets locked, and Appraisors will not be able to edit or delete the performance measures and weightings of a downloaded template, or add any additional measures. Remember to click "Save T-Lock Changes".



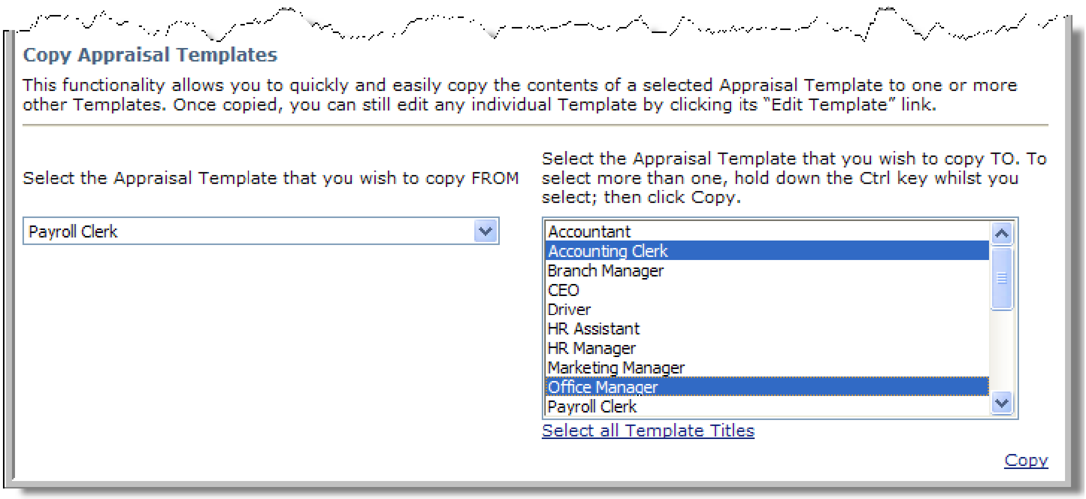
FAQ Note: If you want ALL Template measures to be locked, and not give managers the ability to edit anything in a downloaded Template, or add any additional measures, it is not necessary to lock the individual measures. Just tick the T-Lock tick-box for that Template (see column of T-Lock tick-boxes on the far right-hand side on the Template Manager page). The text of all measures will remain black with the entire Template locked this way.

Templates can also be locked (and unlocked) via the radio buttons at the top of the template itself:



Copy Appraisal Templates

This functionality allows you to copy the contents of a selected Appraisal Template to one or more other templates. Once copied, you can still edit individual templates by clicking their "Edit Template" link.



Downloading an Appraisal Template / Creating a New Appraisal

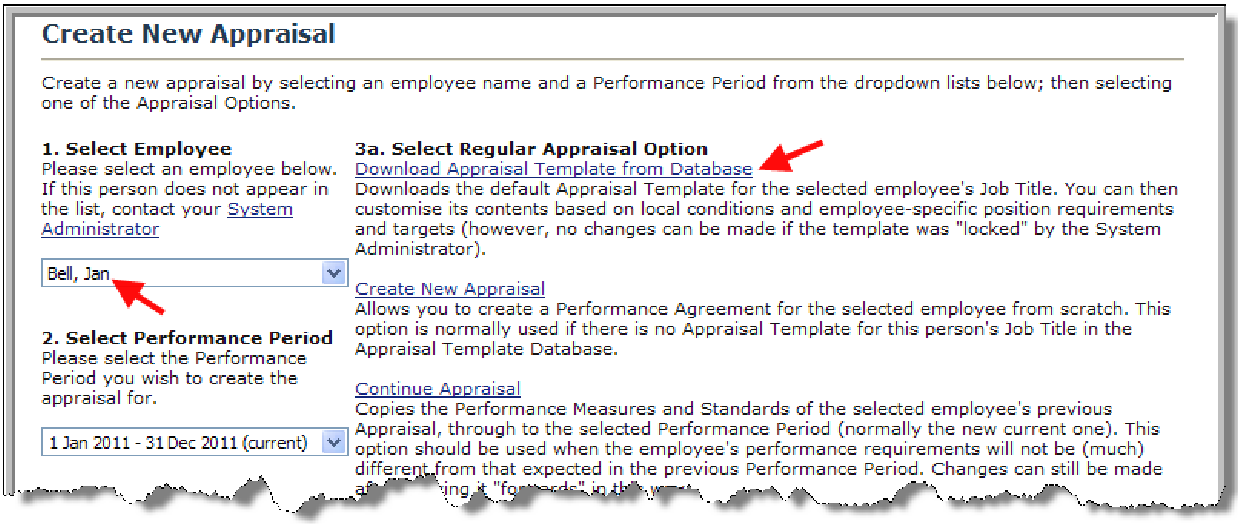
For this next exercise go to **Users >> Browse Users**, and open the User File (link on right) of an employee with the same Job Title for which you have created an Appraisal Template above (or create such a User File from scratch first). If this person does not report to you directly, do not worry, as we are going to get him/her to "report to you" temporarily – just so that you can see how this function works! Also consider adding a dummy user, e.g. Joe Sample, with this job title, reporting to you, so you can experiment with him/her as to how the system works. *(If you do not have any direct reports, consider keeping this dummy user as your permanent "direct report", so you can see what managers see, and so be able to support them better.)*

With the selected person's User File open, select yourself as his/her Appraisor (also make sure the selected Job Title is the one that you have created the Appraisal Template for). If your name does not appear in the Appraisor dropdown list, then go to your own User File first, and tick the Appraisor box under "System Access Privileges" (in such a case, you will need to log out of the system and in again to activate your Appraisor role).

Having done this, click on your role-link "**Appraisor**", top right of your screen (this link will now be highlighted yellow). This takes you to your Appraisor home page, where all your direct reports are listed, along with the status of their appraisals:

Next you need to "create" an Appraisal for the Appraisee selected above. Let's see how this is done.

Select **Appraisals >> Create New Appraisal** (or click "click to create"; OR use the link in the popup that shows when you hover your cursor over the Appraisee's name). The following page opens:



Read the instructions carefully.

In **step 1** you need to select the person you want to create an Appraisal for, and in **step 2** the relevant Performance Period (the default will always be the current period). In **step 3a** you will notice that there are four ways in which an Appraisal can be created. Let's focus here only on the first two (please study the others by yourself later - they are self-explanatory).

Option 1: Download Appraisal Template from Database allows you to download an Appraisal Template from the database for the selected employee (in step 1).

Option 2: Create New Appraisal allows you to create an appraisal for somebody from scratch. This option is used when there is no Appraisal Template for this person's Job Title in the Template Database (NOTE: Appraisal Templates are not compulsory; e.g. they may be inappropriate in the case of senior managerial positions). When clicking this link, the same page format will open as with creating Appraisal Templates, i.e. you can download Competencies and Rating Keys; add Goals, Objectives, KPIs and Standards, and Edit Weightings. Such a Performance Agreement will be unique to a specific employee, and will/does not form part of the Appraisal Template Database.

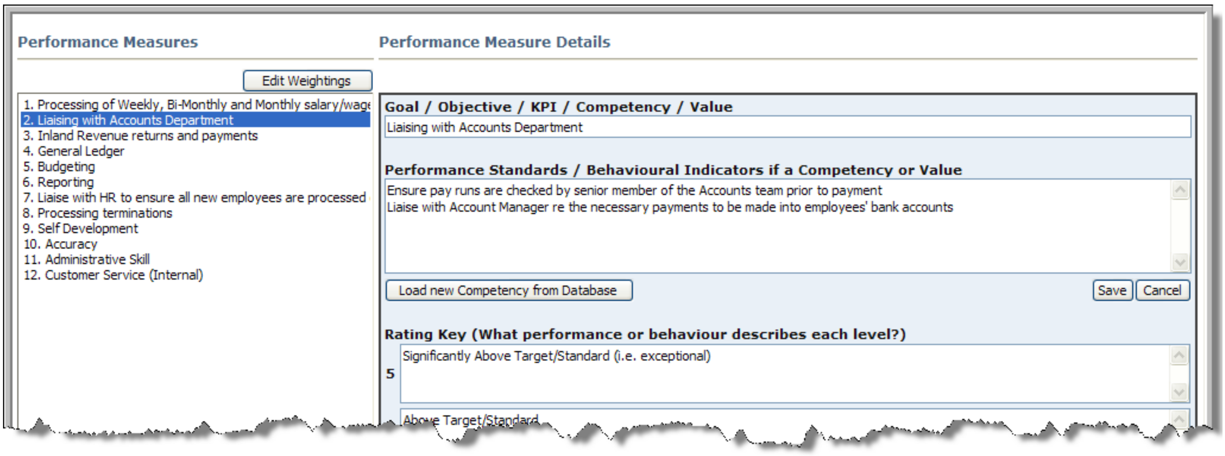
So, to continue with our case study, select the person in step 1 that you have created an Appraisal Template for; then click Download Appraisal Template from Database to download the template for him/her.

The downloaded template is now called a "**Performance Agreement**" (as it now belongs to a specific person with whom the measures need to be discussed and agreed), and looks as follows:

The Appraisal Date will always, by default, show as the last day of the performance period (see screenshot above). Appraisors should overwrite the default date with the actual appraisal interview date as agreed with the Appraisee. The automated email reminders are triggered by this date, which can be different for each Appraisee.

NOTE: If your system is set for anniversary-based appraisals, this date will default to the same day and month as the "Start Date" in the Appraisee's User File.

Select any of the Performance Measures on the left, and its details will show on the right. These can now be edited if the template (or measure) is unlocked. Ensure that the weightings still add up to 100 if measures were added or deleted.



NOTE: This process of creating Appraisals (Performance Agreements) for employees should be done as early as possible at the start of a performance period, so that Appraisees can view theirs at any stage (from their own login), leaving them with no excuse that they "did not know what were required of them".

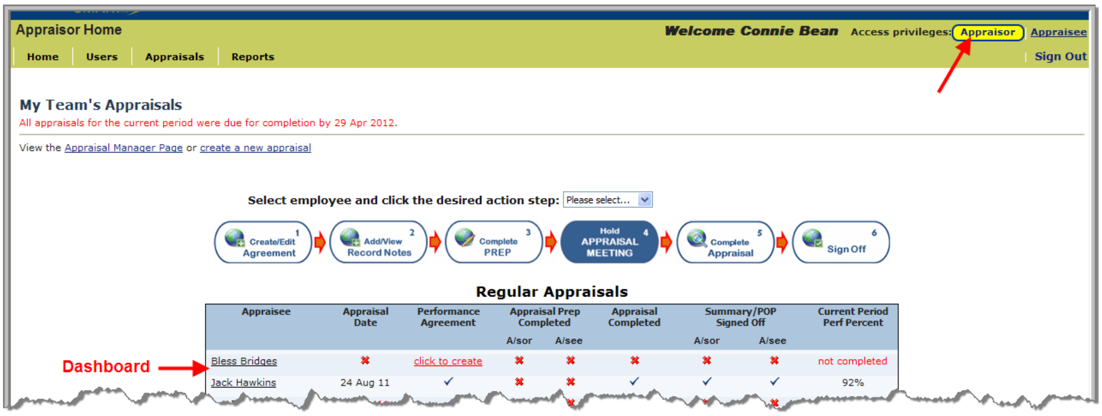
NOTE: Corp- & DivAdmins can also create appraisals on behalf of line managers (a very useful functionality to give you more control over this). See the following system pages in the Corp- & DivAdmin roles:

- **Create New Appraisal:** To create appraisals for individually selected employees.
- **Bulk Create Appraisals:** To create appraisals for all employees in selected units, or even the entire organisation, with ONE MOUSE CLICK. Read the instructions on this page carefully.

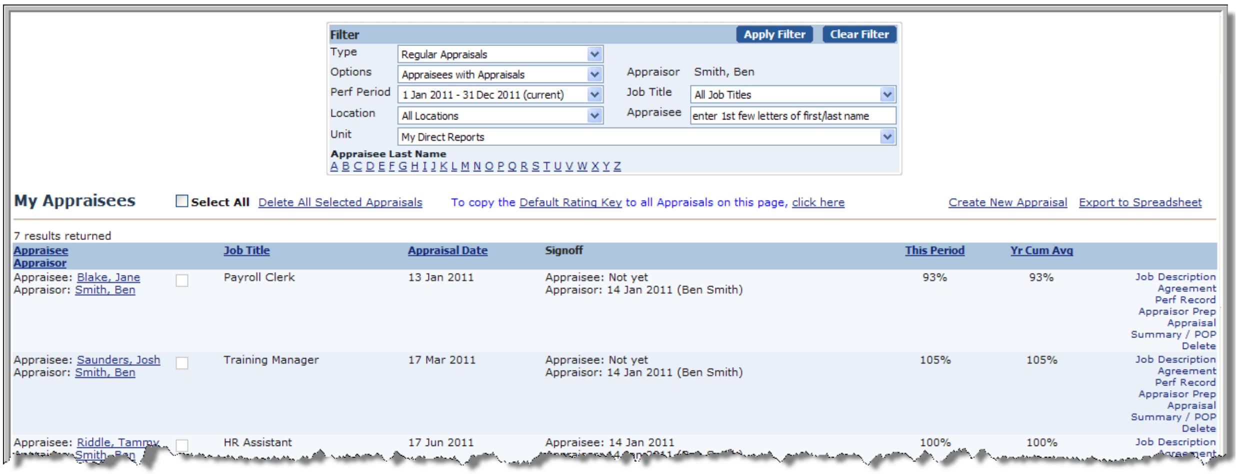
  Appraisals created in bulk by administrators this way get automatically assigned to their respective Appraisees and Appraisors within the system.

Let’s now see how appraisals appear as a “workable” document.

Appraisal Manager View



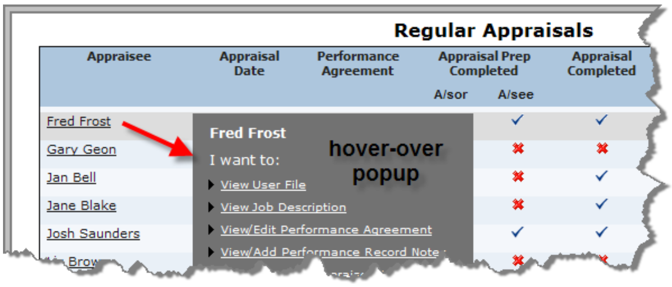
On the Appraisal Manager page you can view and monitor the status of the appraisals of all your direct reports (Appraisees), as well as “indirect” reports if you have further units “under you” (click the UNIT dropdown list in the filter to see the lower-level units). The Appraisal that you have created last will always show at the bottom of the list of appraisals on this page.



The Appraisal Manager page is also a “portal” for gaining access to the following online forms of each Appraisee (see links on far right above and on your pc screen):

- **Job Description** (if this feature is activated): Shows view/print version of Job Description.
- **Agreement:** Opens the Performance Agreement, e.g. to edit.
- **Perf Record:** To upload Performance Record Notes of good or poor Appraisee work performance or behaviour throughout the performance period.
- **Appraisor Prep:** Takes you to the Appraisor Preparation (Draft) Form. The Appraisor’s PREP form cannot be viewed by the Appraisee, or anybody else for that matter – unless the feature to allow its release is activated in System Settings (Appraisees have their own PREP Form, also called “Self-Appraisal”).
- **Appraisal:** Takes you to the Official Appraisal Form of the Appraisee (to be completed after the appraisal interview). The contents of the Appraisor PREP Form can be transferred into this form (individual measures, or the entire PREP Form contents in one go - see transfer links on the PREP Form).
  NOTE: The Official Appraisal Form cannot be viewed by the Appraisee from his/her login until such time as the Appraisor - and Higher Level Manager (HLM) if activated - signs off on the Appraisal (the HLM can e.g. be the Appraisor’s boss or the Corp- or DivAdmin.).
- **Summary/POP:** Contains the Performance Percentage Calculations (or rating averages), Performance Optimisation Plans, and signoff links. NOTE: The Summary/POP Form also cannot be viewed by the Appraisee from his/her login until such time as the Appraisor (and HLM if activated) signs off on the Appraisal.
- **Delete:** Deletes an appraisal that has not been signed off yet.

NOTE: The Appraisor home page dashboard is another easy way to view the status of employee appraisals, and to access their various appraisal forms via the links in the hover pop-up that shows when putting your cursor over an Appraisee's name:



Performance Record Functionality ("Perf Record" link)

You can disable (in System Settings) the Performance Record Functionality for both Appraisor and Appraisee, or just Appraisees. A system warning will pop up (when clicking "Perf Record") if access had been disabled in this way.

If ENABLED for both parties (the default setting), the Appraisor and the Appraisee will have the ability to upload performance data, and examples of good ("highlight"), general, or poor ("lowlight") work performance or behaviour (incidents) into the system, to "call up" at appraisal time.

Best practice suggests that the line manager should first consult with the employee before uploading such performance record notes. They need to establish all the facts first, give feedback (verbally, and in person if possible), do coaching if necessary, and only then upload such performance record notes into the system.

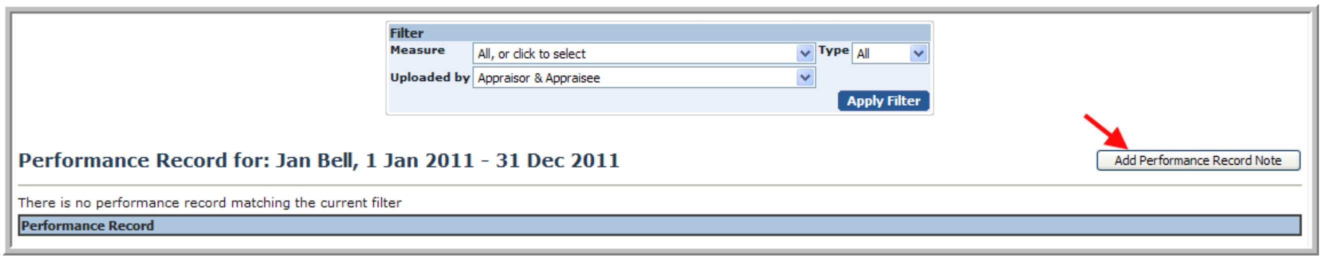
Such regularly uploaded performance notes will ensure that the FULL performance period is considered during appraisals, and not just the last few months – as the general complaint goes.

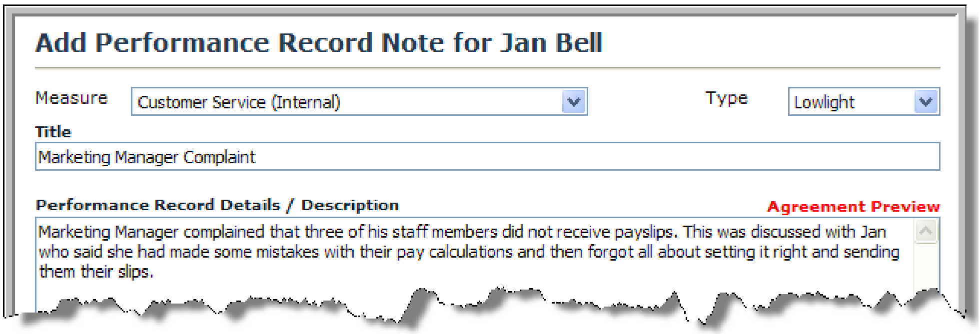
You can set the Performance Record accessibility for Appraisees as any one of the following in System Settings:

- Appraisees cannot add or view Performance Record Notes
- Appraisees cannot add Performance Record Notes but can view the Appraisor's
- Appraisee cannot view the Appraisor's Notes but can add their own
- Appraisors can hide individual Performance Record Notes from Appraisees

(Previously covered in this guide; also refer to System Settings>>Performance Record Notes)

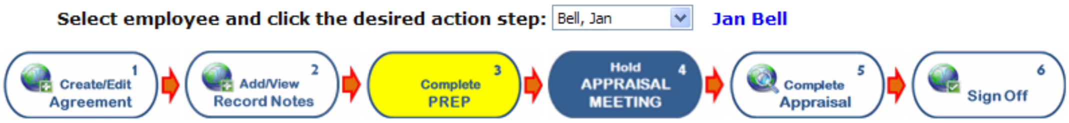
The two screenshots below show how a Performance Record Note gets added:





Two electronic files can be attached (uploaded) to each Performance Record Note as evidence of the incident recorded, e.g. an email from a client, or a spread sheet with performance data.

When clicking SAVE, a system popup will ask you if you want to notify the Appraisee of the note you have added (done by system-generated email).



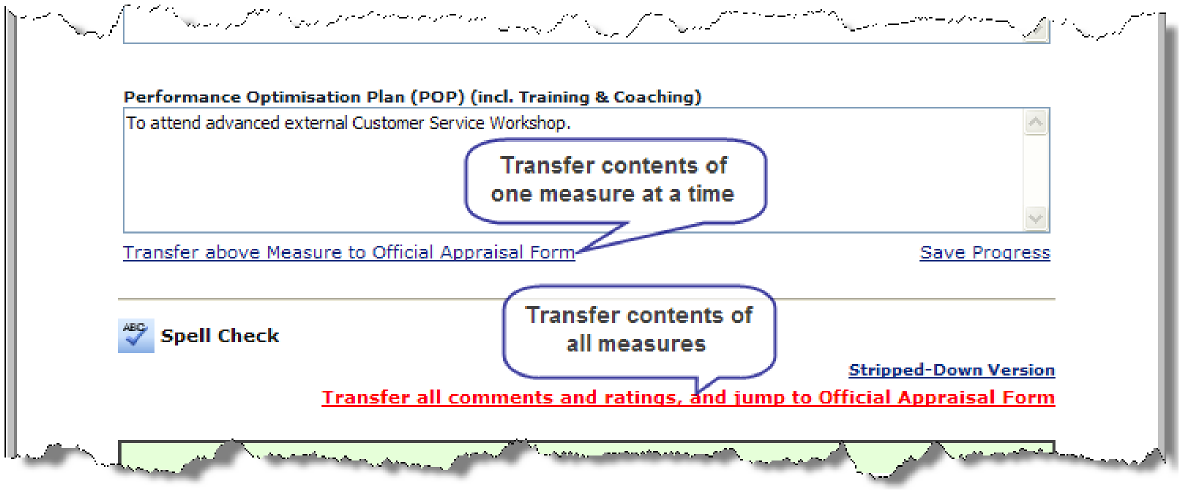
(Also REFER to the separate **Appraisor User Guide** for more in-depth details, examples and screenshots in respect of the Appraisor role)

As Appraisor, start with the **Appraisor Prep** form at appraisal time. Enter your provisional notes and ratings in respect of each of the Performance Measures (consult the **Performance Records Notes** in the process), and then print out the PREP Form to take with you to the appraisal interview. The Appraisee needs to do the same with his/her own PREP Form.

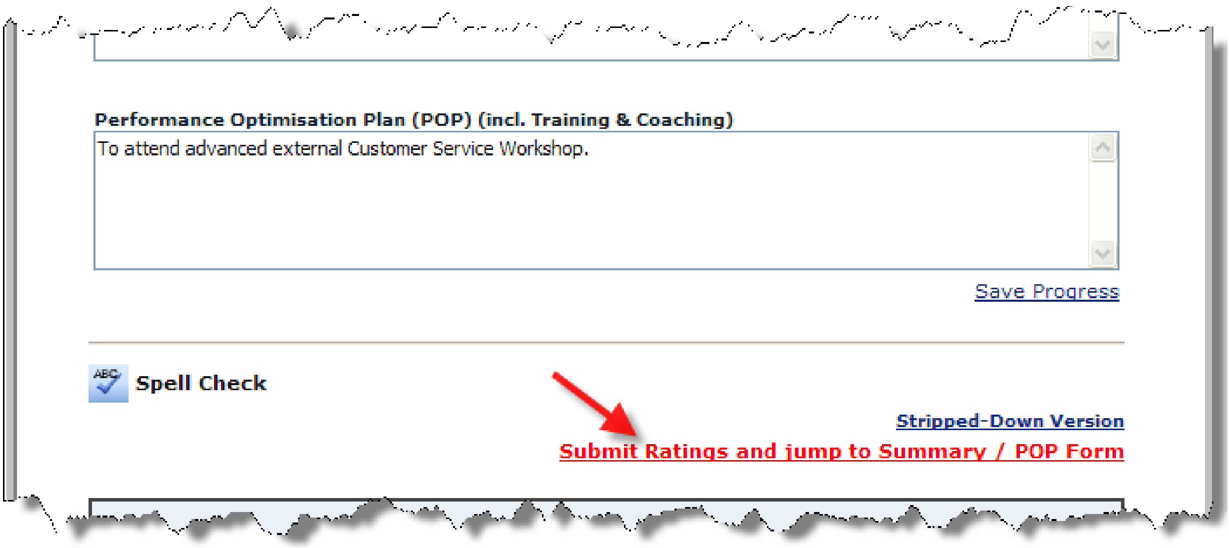
NOTE: You can request the Appraisee to release his/her PREP Form to you to preview prior to the appraisal, but first check your organisation's policy in this regard. Such a "released" PREP Form will show as another (red) link on the Appraisal Manager page: "**Appraisee Prep**".

After the appraisal interview, go to the **Official Appraisal Form** ("Appraisal" link), and enter the results of the appraisal as mutually agreed with the Appraisee.

NOTE: You can copy your ratings and notes from your Appraisor PREP Form over to the Official Appraisal Form – one measure at a time, or all in one go by clicking the "Transfer all comments and ratings, and jump to Official Appraisal Form" link at the bottom of the PREP Form. Ratings and notes can also be transferred from a released Appraisee PREP Form to the Official Appraisal Form in exactly the same way.



Once you are satisfied with the contents of the Official Appraisal Form (reflecting what was agreed with the Appraisee during the appraisal interview), click the link bottom of page “**Submit Ratings and jump to Summary / POP Form**”.



That will take you to the **Summary/POP Form** where the performance calculations show, as well as all the Performance Optimisation Plan (POP) Notes.

Finally, you can enter some overall comments (in the field next to “Appraisor”), and sign the appraisal off by clicking: Sign Off Now.

Summary/POP Form Sign Off

Appraisal Summary and Performance Optimisation Plan (POP)

Appraisee Information

Name: Jan Bell **Job Title:** Payroll Clerk

Location: Sydney **Unit:** Human Resources->Payroll

Appraisal Information

Appraisor: Ben Smith **Appraisor Job Title:** HR Manager

Perf Period: 1 Jan 2011 - 31 Dec 2011 **Appraisal Date:** Fri, 21 Jan 2011

Sign Off

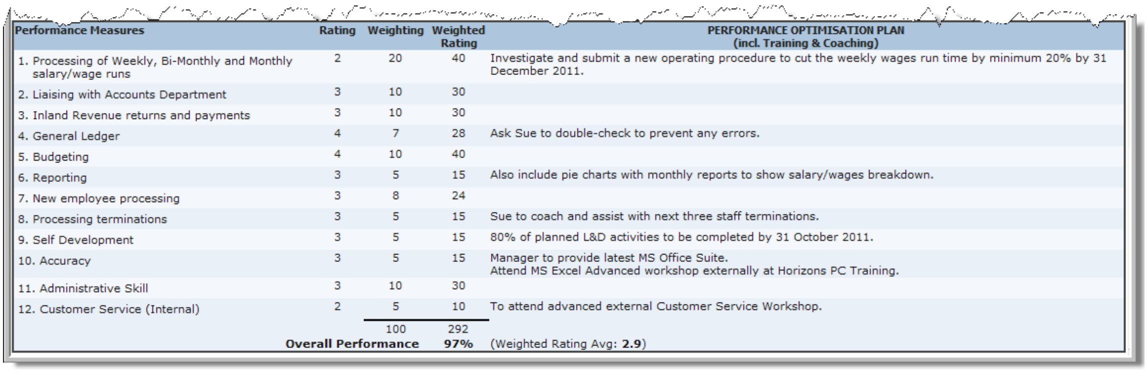
Please enter any general comments you may have, and then sign the Appraisal off by clicking the "Sign Off Now" link. The Appraisee signs off last, and should be given sufficient time and privacy to do so.

Appraisor

Well done with your first year with us Jan. Just give a little more attention to internal customer service, and things can only go better from there.
I am very satisfied with the way in which you have taken command of your role and the excellent relationship you enjoy with all staff.
All in all, well done!

Save Comments Sign Off Now

Appraisee



Performance Measures	Rating	Weighting	Weighted Rating	PERFORMANCE OPTIMISATION PLAN (incl. Training & Coaching)
1. Processing of Weekly, Bi-Monthly and Monthly salary/wage runs	2	20	40	Investigate and submit a new operating procedure to cut the weekly wages run time by minimum 20% by 31 December 2011.
2. Liaising with Accounts Department	3	10	30	
3. Inland Revenue returns and payments	3	10	30	
4. General Ledger	4	7	28	Ask Sue to double-check to prevent any errors.
5. Budgeting	4	10	40	
6. Reporting	3	5	15	Also include pie charts with monthly reports to show salary/wages breakdown.
7. New employee processing	3	8	24	
8. Processing terminations	3	5	15	Sue to coach and assist with next three staff terminations.
9. Self Development	3	5	15	80% of planned L&D activities to be completed by 31 October 2011.
10. Accuracy	3	5	15	Manager to provide latest MS Office Suite. Attend MS Excel Advanced workshop externally at Horizons PC Training.
11. Administrative Skill	3	10	30	
12. Customer Service (Internal)	2	5	10	To attend advanced external Customer Service Workshop.
		100	292	
	Overall Performance		**97%**	(Weighted Rating Avg: **2.9**)

NOTE:

- The Appraisee will not be able to access the Official Appraisal or Summary/POP Forms from their login until such time as you have signed off on the appraisal (as well as the Higher Level Manager if the 3rd level signoff feature of the system had been activated).
- If the **Weightings and Performance Percentages** feature of the system had been disabled by you, then Rating Averages as opposed to Performance Percentages will show in the system.

Appraisee Signoff

(Study the **Appraisee User Guide** for more details on the Appraisee role)

Once the Appraisor (and HLM if activated) have signed off, Appraisees should go to their **Appraisals >> Appraisal Manager** page (or use their home page dashboard popup, or action step icons) to access the following online forms via the links on the right:

- **Job Description** (if this feature activated)
- **Agreement Preview** (to review their measures and standards to achieve)
- **Performance Record** (if this feature activated) (to add performance record notes, and view the manager's)
- **Appraisal Prep** (for self-appraisal in private, and to then print out to take to the appraisal interview)
- **(Official) Appraisal** (read-only view of ratings and notes by Appraisor, as mutually agreed during the appraisal interview)
- **Summary/POP** (to add own overall comments and sign the appraisal off)

Appraisees should enter their own final overall comments on the Summary/POP Form, and then sign the appraisal off as well. After this had been done, Appraisors cannot make any further changes to any of the appraisal forms, unless they ask the Corp- or DivAdmin to undo the signoffs of all parties first.

The Appraisee needs to be aware of and agree to this, such as when both parties agree that something needs to be changed on one of the forms. The normal signoff sequence must then be followed again, with that of the Appraisee taking place LAST to "lock" all the forms again.

TALENTPEAK™ SUMMIT GOAL MANAGEMENT SYSTEM

[Marketing Video Link>>http://www.talent-peak.com/summitgoalmanagement.html](http://www.talent-peak.com/summitgoalmanagement.html)

The **Summit Goal Management (GM) Module** is an add-on system to the core TalentPeak™ (regular performance appraisals) System or can be set up as a standalone system.

The aim of this guide is to help you to comprehend and set up the Summit Goal Management Module in the shortest possible amount of time. Relevant screenshots are provided, where necessary, for added clarity.

The guide is divided in three sections, illustrating the role of the three main participant levels:

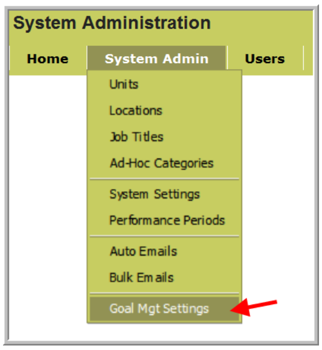
- CorpAdmin
- Manager
- Employee

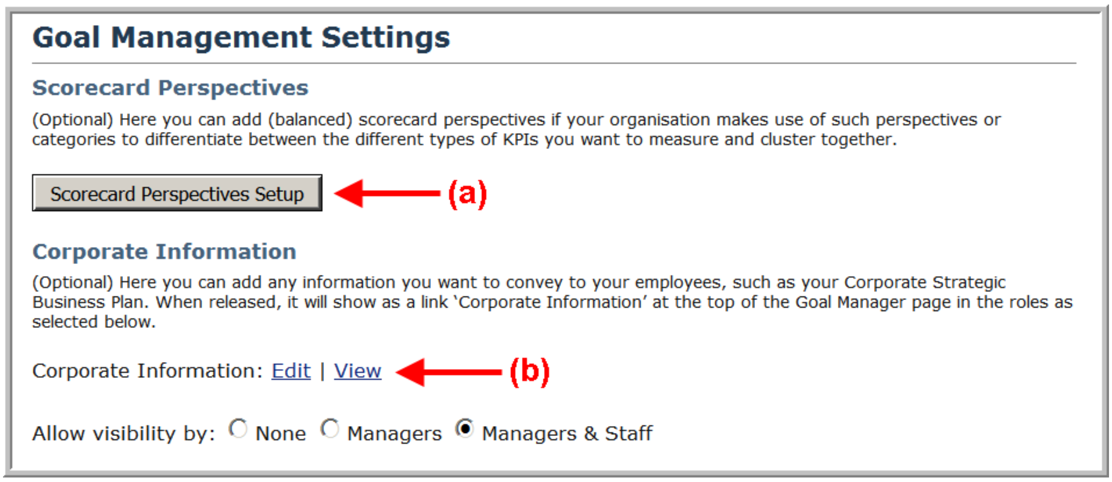
Fact Note: TalentPeak™ is written in International English Spelling to enable a globally acceptable format

CorpAdmin Role

Goal Management System Settings

Go to **System Admin >> Goal Mgt Settings**:





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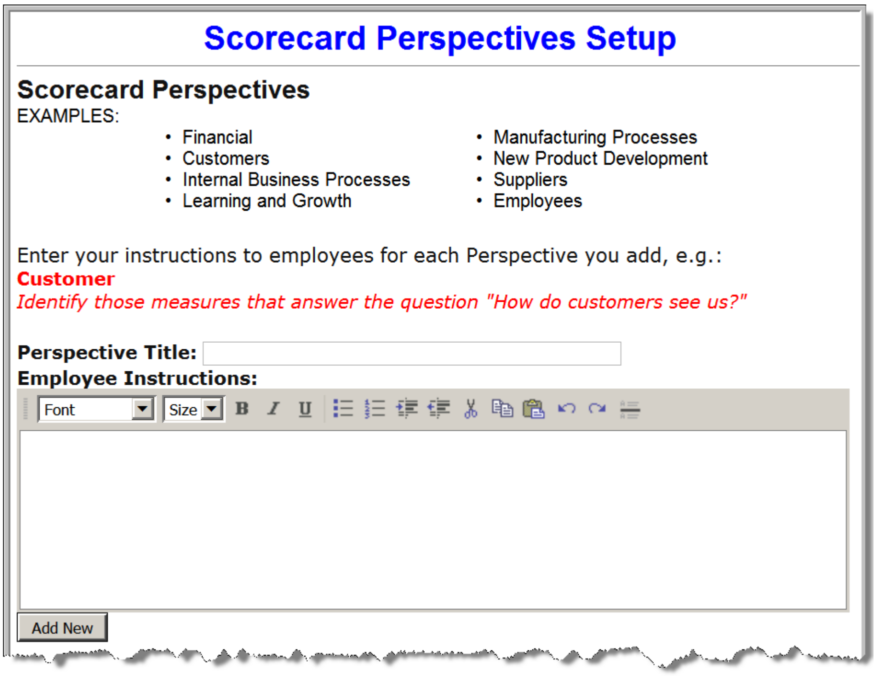
Note that both these settings are **optional.**

Scorecard Perspectives Setup

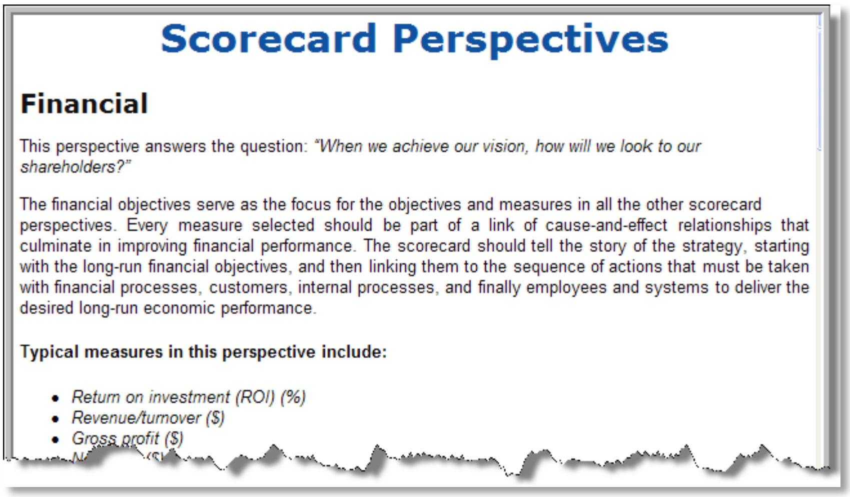
Your organization may or may not use (balanced) Scorecard Perspectives (KPI Categories). If you do, and you want to use them in the GM Module, then add them on this page. They will then be viewable as a reference for your staff in various places in the system.



The best known scorecard perspectives are those of Kaplan and Norton. Do a web search on 'Balanced Scorecard' or read more about it here: http://en.wikipedia.org/wiki/Balanced_scorecard

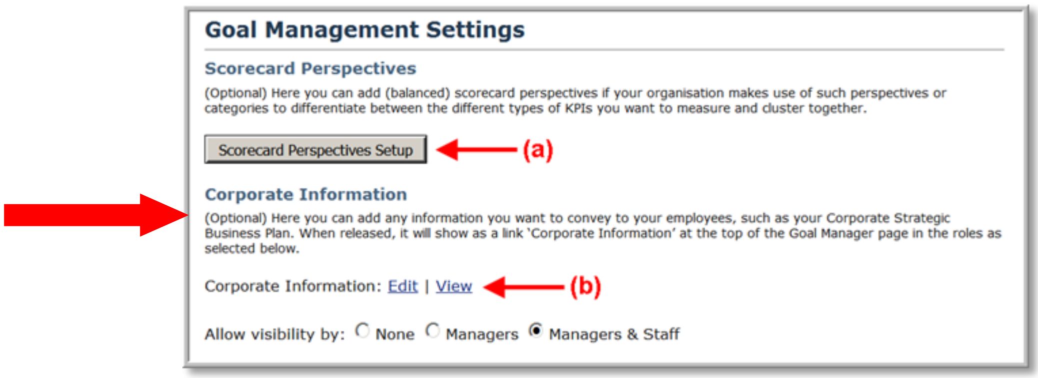
By setting up your organization-specific scorecard perspectives here, you will be able to classify your critical Key Performance Indicators (KPIs) as belonging to specific perspectives. This will help you ensure that the key metrics (KPIs) of your business unit and organization are covered in a balanced way, and an eye kept on them to make sure they stay on track and on target.

Below is an example of what the staff view version looks like (the contents will be whatever you enter into the setup page above):



If you do not want to use scorecard perspectives, then leave this scorecard perspectives page empty. It will still be possible to add them at any time later.

Corporate Information



Add here anything you would like to share with your employees with respect to your corporate strategies and goals, etc.

This, for instance, is a good place to add your Corporate Strategic Business Plan, and to then, once completed, make it visible to managers only, or managers and staff. The contents can be changed at any time, of course, to keep it fresh and current.

Below is a partial example:

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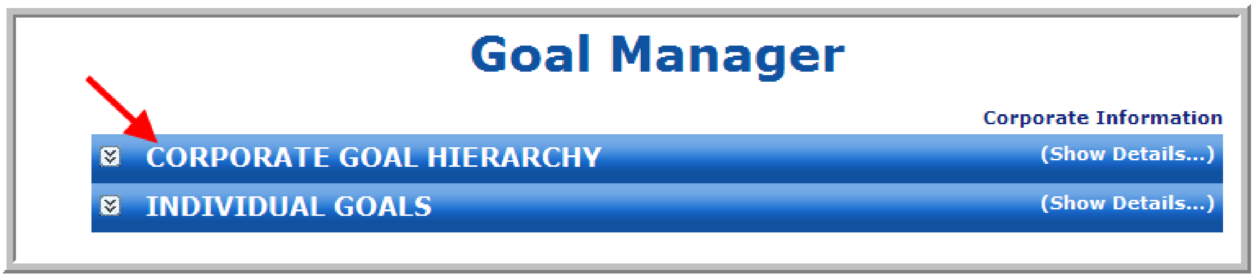
Goal Management Categories and Hierarchy

Corporate Goal Hierarchy

Go to **Goals >> Goal Manager**:

Select **Corporate Goal Hierarchy.**

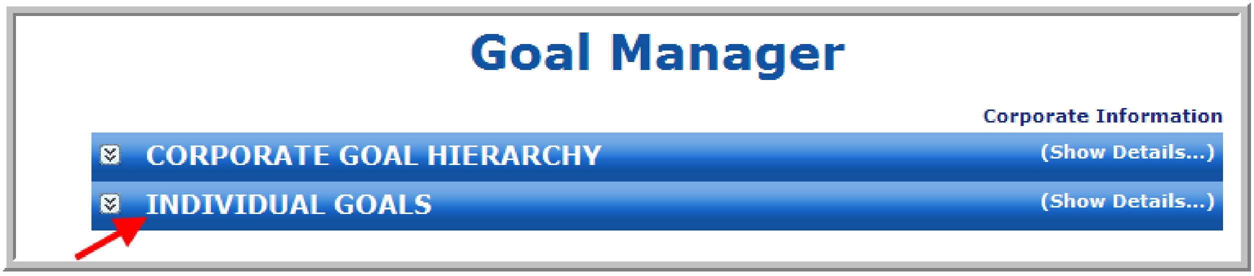


This feature allows a CorpAdmin (who can also be the President/CEO/MD of the organization when you set up multiple CorpAdmins) to build a hierarchy (or library) of Corporate Goals, which can then be made visible to your units lower down, so managers can cascade relevant ones to specific employees/direct reports.

- You need to first create **Goal Categories**, which could e.g. be the same as your Scorecard Perspectives if you make use of the latter.
- Following that, you can add any number of **Goals** (even sub-goals) to the various Goal Categories.
- See the red 'action links' at the top of the page as to what you can do with each of your selections.
- One or more goals (from any one or more categories and/or goal levels) can be **cascaded** to one or more employees in the organization. This will be illustrated in detail in the Manager (Appraisor) role, as it works the same way there.
- Goal categories and goals can be changed and updated at any time, e.g. annually, or even more frequently.

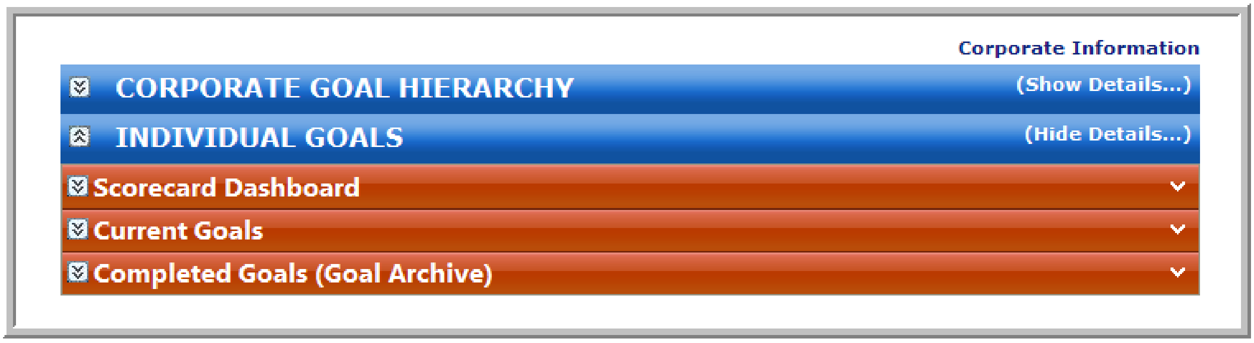
Individual Goals

Select **Individual Goals** page.



Clicking it opens the following three page headers:

- Scorecard Dashboard
- Current Goals page
- Completed Goals (Goal Archive) page

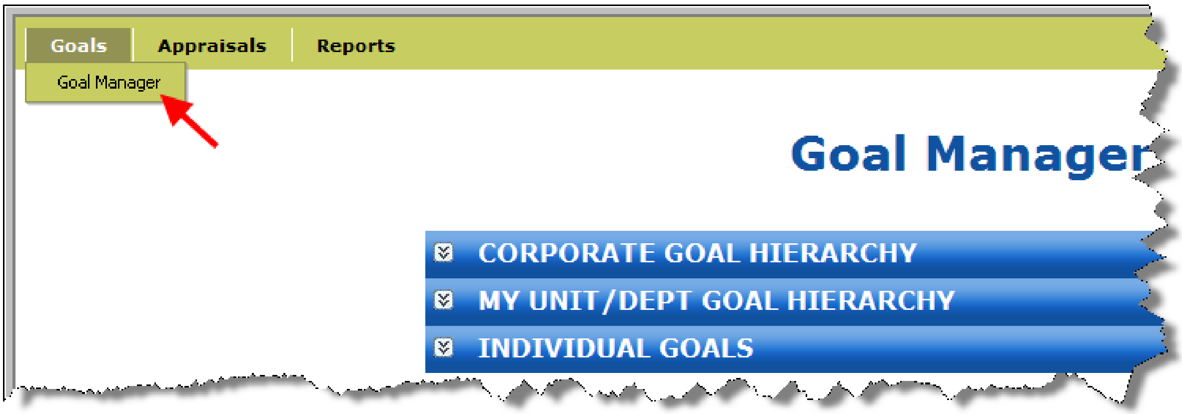


The use of these pages will become clear after studying the Line Manager role below. Suffice it to say at this point that what a manager can see and do on the Goal Manager page for his/her direct reports, the CorpAdmin/s can see and do for all employees in the organization (or for assigned divisions in the case of DivAdmins), except that managers has the right (the default setting) to hide the goals of their direct reports from the Corp-DivAdmin/s, until they are ready or want to give viewing (and even editing) rights to them. Consider developing a company policy in this regard.

Line Manager Role

Go to the **Appraisor** (line manager) role:

Go to **Goals >> Goal Manager**:



Corporate Goal Hierarchy

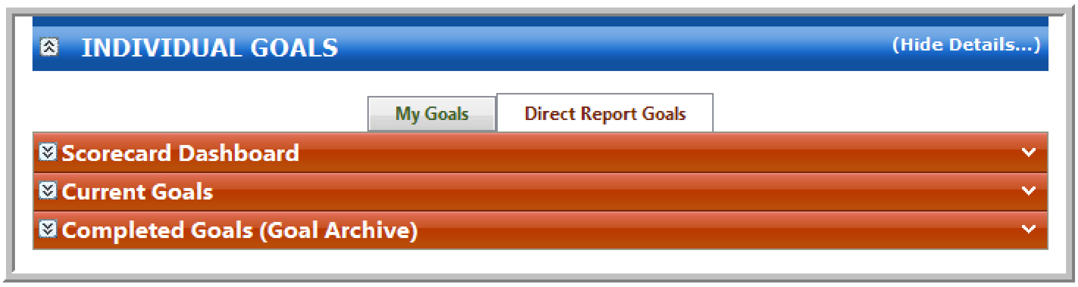
If made visible to managers by the CorpAdmin, this will be viewable here, and these goals can now be cascaded to any of your direct reports. This process will be illustrated in detail later in this user guide.

My Unit/Dept. Goal Hierarchy

Some goals from the Corporate Goal Hierarchy may be relevant to you as manager, so you can add them here as well, but most importantly, here you can add Goal Categories and Goals specific to your department and operations. This allows you to plan in details all your unit goals, which can then be cascaded to yourself and/or your direct reports. This cascading process will be illustrated further down in the user guide.

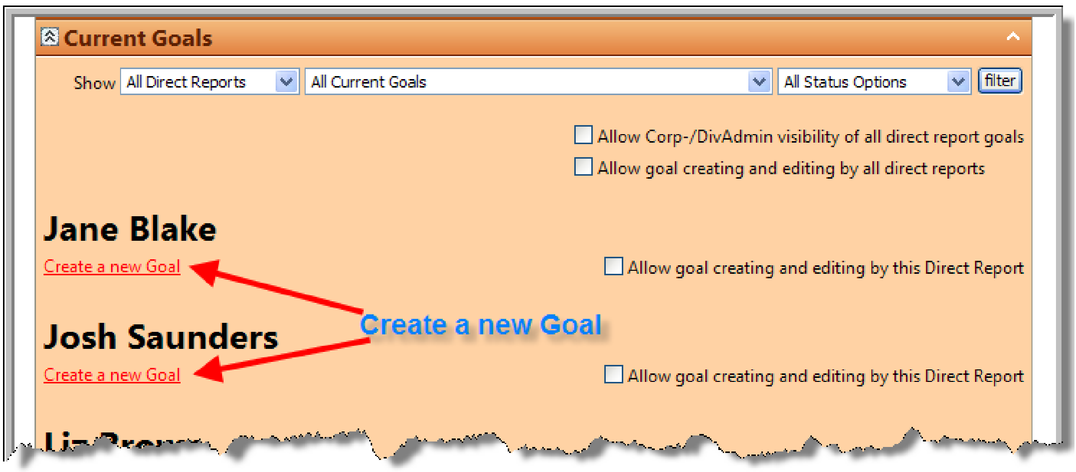
Individual Goals

- The **My Goals** tab takes you to your own goals page (which can also be viewed in your Appraisee role).
- The **Direct Report Goals** tab takes you to your direct reports' goals pages (we will now study these in detail, starting with the Current Goals page in order to follow a logical sequence).



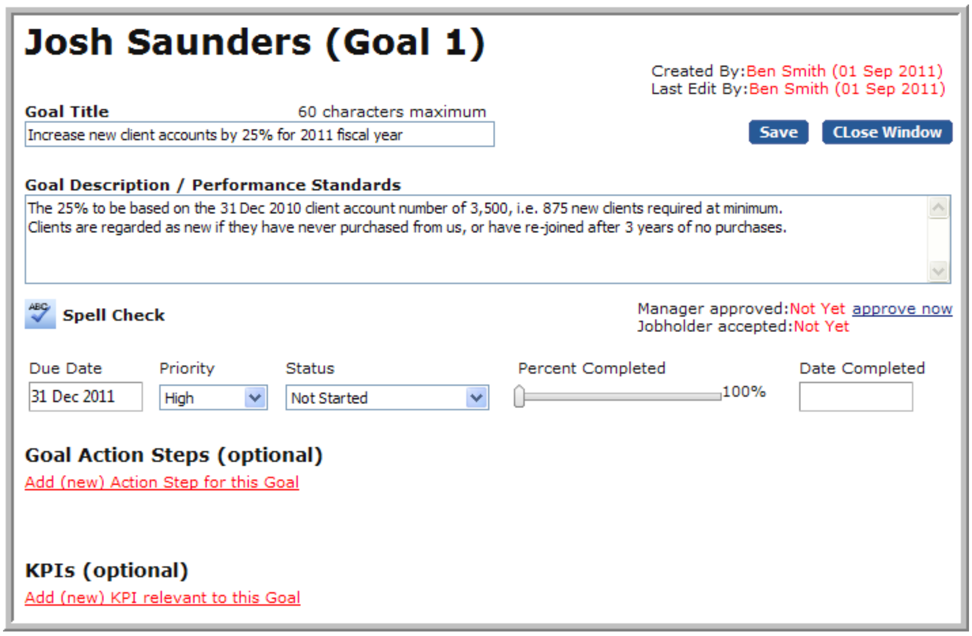
Current Goals

Opening this page, reveals all your direct report names, and a link "Create a new Goal" with each.



Creating a New Goal

Clicking "Create a new Goal" opens the following pop-up page, where you can enter goal details as illustrated:



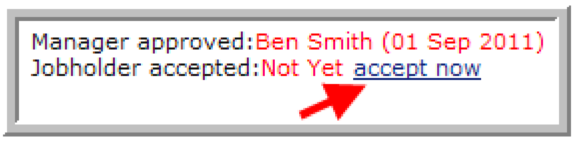
- **Goal Title:** (1) Start with an **action verb**, such as '*Increase*', '*Implement', 'Ensure', Achieve', 'Complete'*, etc., (2) add the **outcome** to be achieved ('*increase new client accounts by 25%*'), and (3) the **due date** *('by 31 Dec 2011).*
- **Description:** List additional performance standards to make it as clear as possible to the jobholder (employee) as to what quantitative (KPIs) and qualitative measures and parameters should be achieved and/or adhered to.

Employees can only be productive when they know exactly what are expected of them, i.e. having goals that are SMART:

S - Specific (clearly specify the intended outcome/s)
M - Measurable (quantifiable; state exactly what the criteria for success are and how they will be assessed/measured)
A - Attainable (challenging but achievable; employee must have the skills, time, resources and authority to deliver the expected results)
R - Realistic (relevant to the employee's role; must be willing and able to work towards its achievement)
T - Time-bound (clearly define the time frame and/or target date)

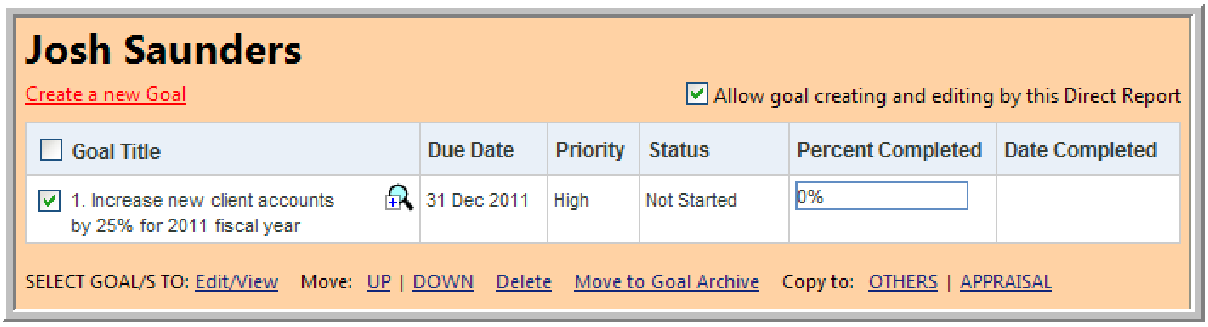
To ensure employee commitment and buy-in, jointly discuss and agree their goals with them.

- **Due Date:** Agree this with the jobholder.
- **Priority:** Select the relevant option.
- **Status & Percent Completed:** Set by jobholder as he/she progresses with goal achievement – needs to be updated at agreed times, e.g. weekly on Mondays before 10am, so the manager can check on their progress for all direct reports.
- **Date Completed:** Selected by manager once satisfied that goal had been achieved.
- **Approve:** Manager approves the goal, by clicking the 'approve now' link. This locks the Goal Title, Description, Due Date, and Priority. This approval can be undone at any time by the manager, if changes to the above items need to be made. This will also undo the jobholder goal acceptance (signoff), which needs to be done again after the change and manager new approval.
- **Accept:** The jobholder needs to accept (sign off on) the goal from his/her login.



Current Goals Page View

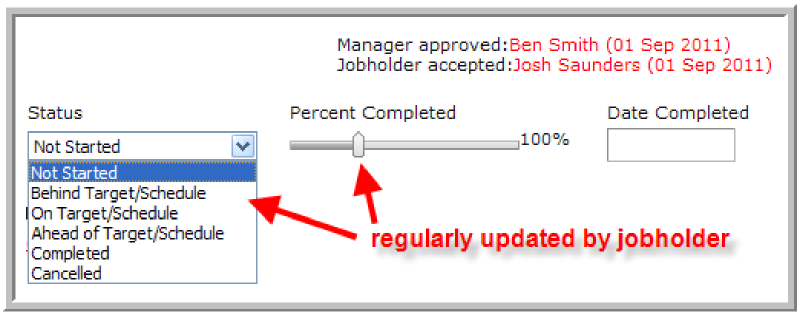
When saving the goal and closing the goal pop-up page, it will now show as follows on the **Current Goals** page.



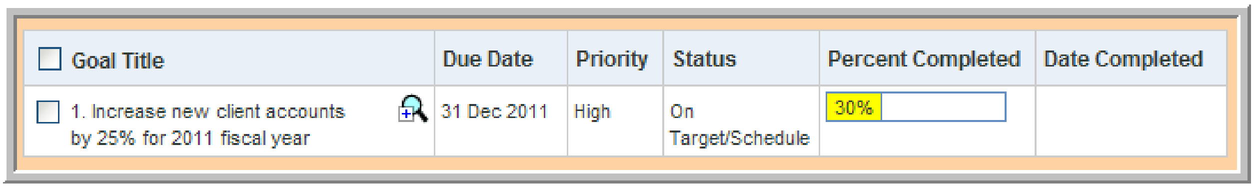
You can select a goal again at any later stage to:

- Edit/View
- Move up or down in the list of goals
- Delete
- Move to the Goal Archive (once completed)
- Copy to other direct reports
- Move to the employee's appraisal Agreement (with the core Appraisal System activated)

The **Goal Status** and **Percent Completed** need to be update regularly by the jobholder, e.g. on a weekly basis



When updated this way, it will display as follows:



Adding Goal Steps (optional)

Click 'Add (new) Action Step for this Goal' if you want to set some key steps to be taken in the execution of the goal (or the jobholder can do this).

Clicking this link opens the following pop-up page, where you can enter the step details as illustrated:

Enter the step details as illustrated:

Having entered the steps, they will display as follows on the goal page:

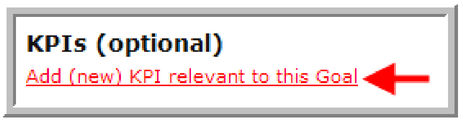
Adding KPIs (optional)

A KPI is a key quantifiable measure/metric that you want to keep continuous tabs on -- as a crucial, quick (leading) indicator of how the goal is or had been achieved (and how the employee, unit or organization is faring in it). Here are a few examples:

- Sales ($)
- Budget variance ($, %)
- No of customers (#)
- Customers lost/churn (%)
- Customer satisfaction index (%)
- Profit / customer ($)
- Customer Complaints (#)
- On-time delivery (OTD) (%)
- Rejects (#, %)
- Staff turnover (%)

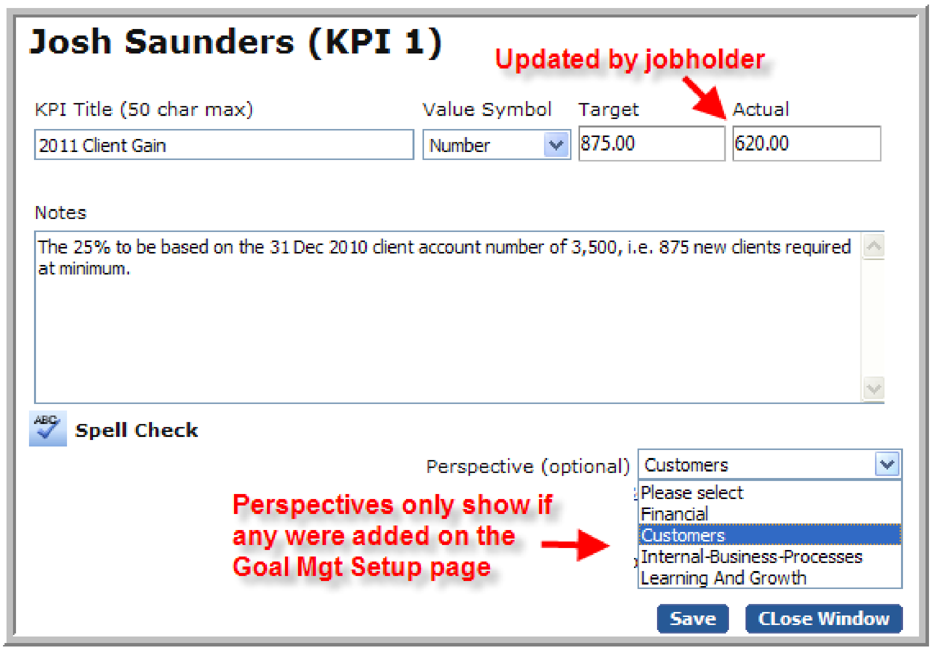
The idea is to act immediately when you notice that these KPIs are behind target, and for that reason they have to show in a place where they are easily visible (i.e. the **Scorecard Dashboard** – see next page).

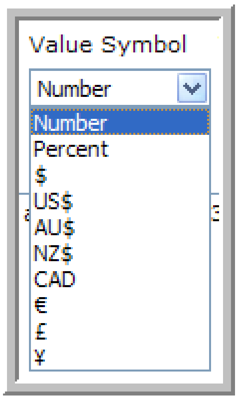
Click 'Add (new) KPI relevant to this Goal' if you want to set some Key Performance Indicators (KPIs) to be achieved.



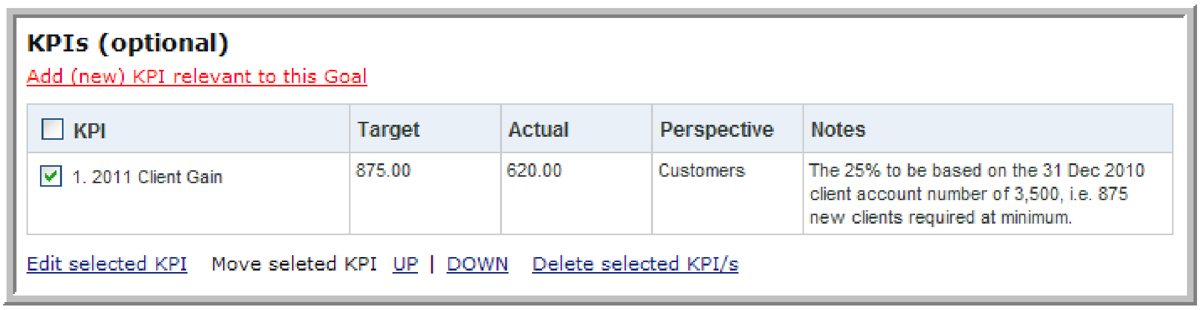
NOTE: that while most of the time only one KPI per goal may be relevant (even none if there are no relevant quantifiable metrics), it can happen that more than one KPI may be relevant with certain higher-level goals (e.g. a goal such as '*Increase market share to 40%*', may have various additional KPIs to do with Budgets, Revenue, Profitability, ROI, etc.).

Clicking this link opens the following pop-up page, where you can enter the KPI details as illustrated below. Select a **Value Symbol** relevant to your KPI.



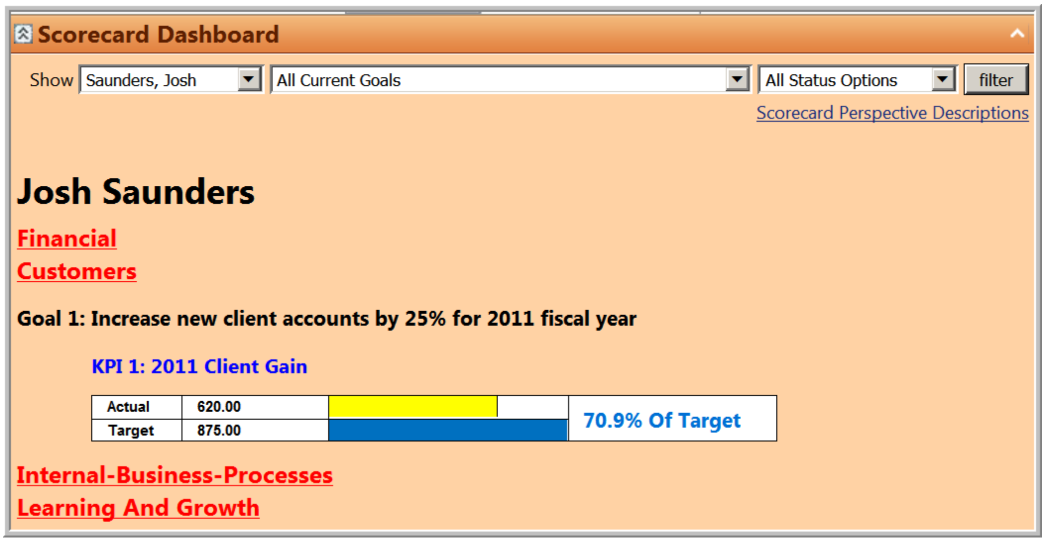


Having entered the KPI/s, they will display as follows on the goal page:



Scorecard Dashboard

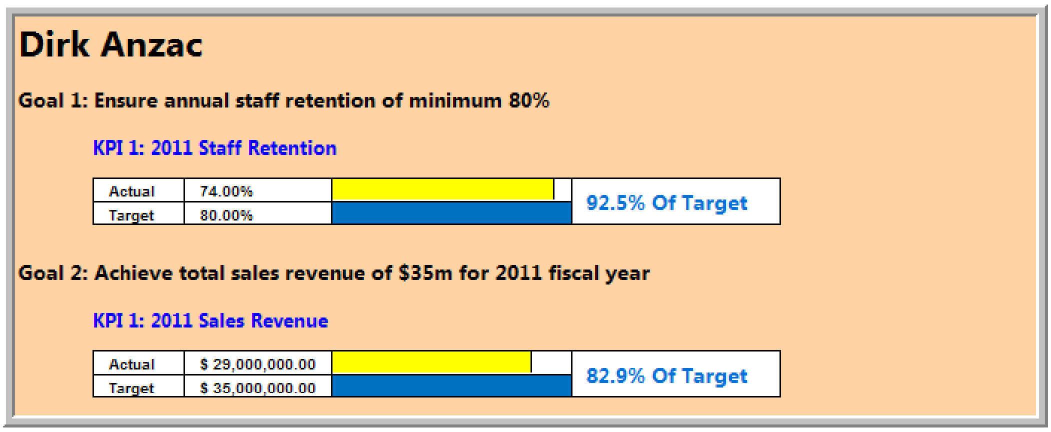
The KPI shows as a simple bar chart on the **Scorecard Dashboard** page, where managers can have a quick, birds-eye view of the status of the key metrics (KPIs) of all direct reports in their units.



There should be set times arranged when employees need to update their Goals and KPIs **Status** and **Actual** figures, e.g. once per week on a Monday by a certain time; middle managers by e.g. a Tuesday; and senior managers by e.g. a Wednesday, so the figures can be 'rolled up' all the way to the top.

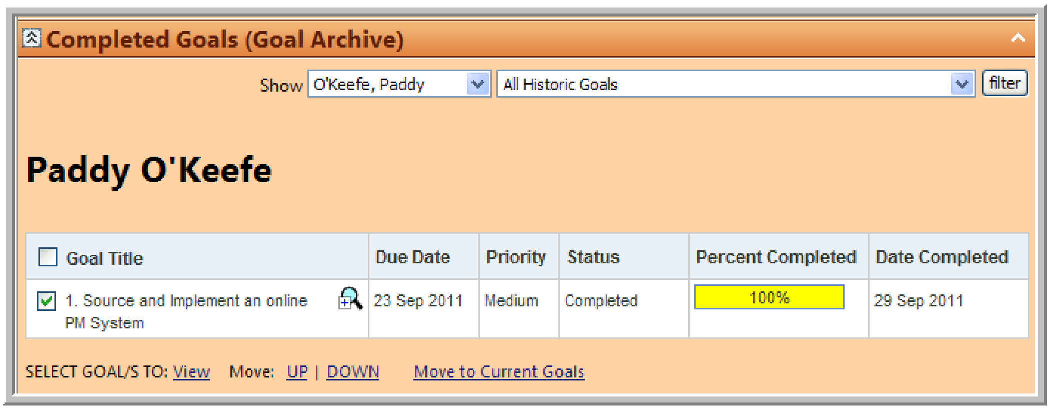
"Rolled up" is in inverted commas as it is not done automatically by the system, but by the lower levels inputting their performance stats first, which are then viewed by the next higher level, who use it to calculate their own performance stats to input re their own goals, so the next level can do the same again re their own goals, and so on, all the way to the top. This way each higher level only takes what they need from the lower level stats re their own goals to report higher up on. Some KPIs may not need to be 'rolled up', as many goals and KPIs may just be relevant to your own unit level and you may not be required to report on them to your manager, as they have not been set as goals and KPIs for you to achieve (e.g. the goals you have set as unique goals relevant to your own unit only, in your unit Goal Hierarchy).

NOTE: When no **Scorecard Perspectives** are used by your organization (so none added on the setup page), the **Scorecard Dashboard** page will look as follows (no red **Perspective** headings):



Completed Goals (Goal Archive)

Once a goal is completed, it can be moved to the **Goal Archive** by the manager.



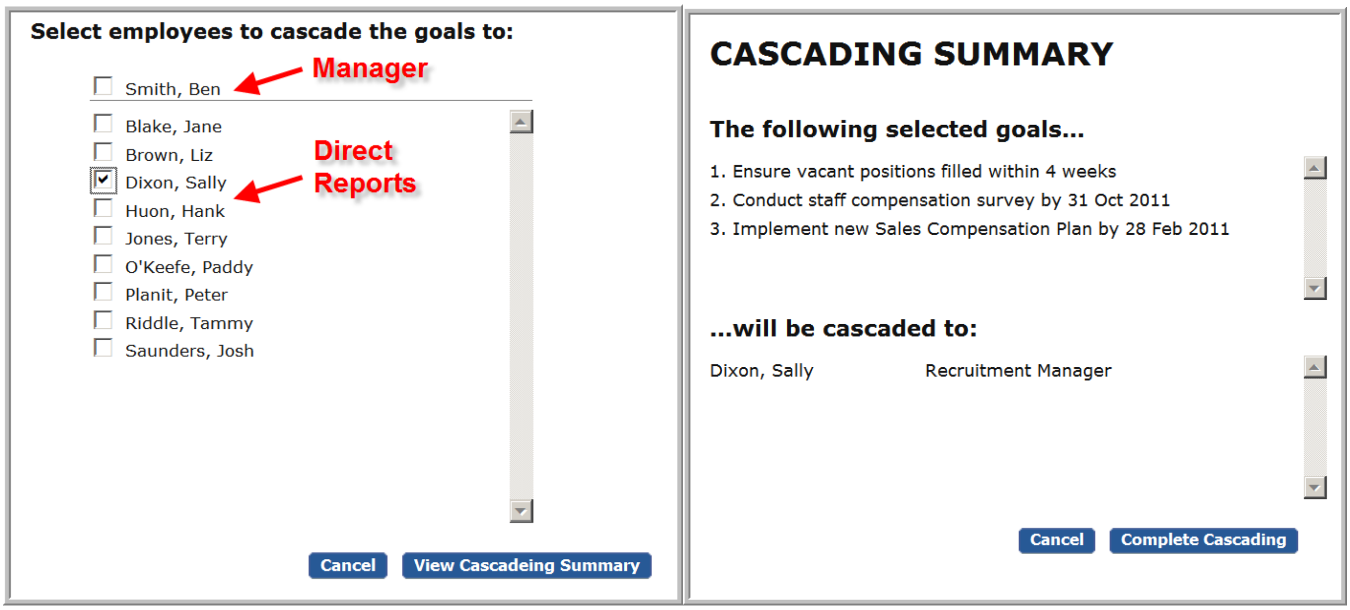
NOTE: Consider leaving completed goals in the **Current Goals** section until the end of the performance year, so they can first be moved to the employee's Appraisal Agreement, to form part of the employee's performance measures (if you have not already done so at the start of the performance year when adding the goals). This is only true if your organization has subscribed to the core TalentPeak™ System as well.

Cascading Goals

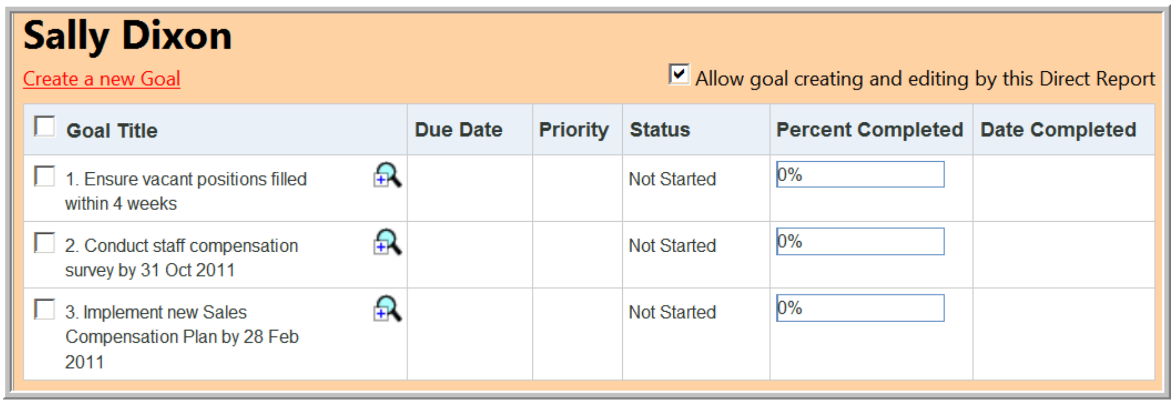
Goals can be cascaded from either the Corporate or Unit/Dept. Goal Hierarchies. Select goals from anywhere in a hierarchy, and then click the "Cascade Selected Goals" button.

- The first pop-up below shows, where you can select **one or more employees** to cascade the goal/s to, including yourself.
- The second pop-up shows when clicking the "View Cascading Summary" button.

Cascading Summary View:

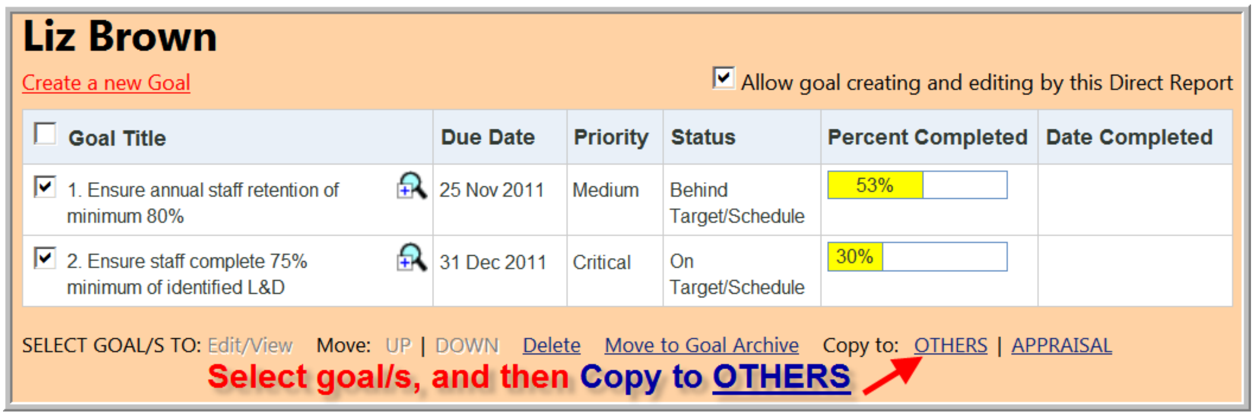


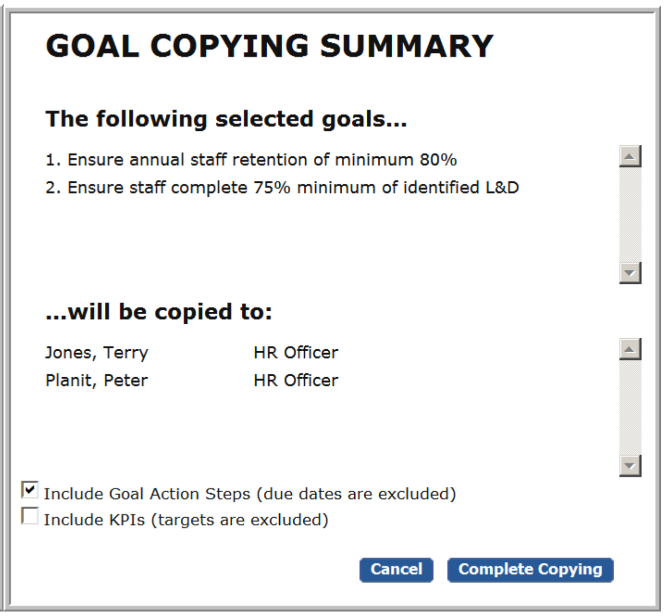
When you finally click the “Complete Cascading” button on pop-up two above, the goals will now show under the employee’s name on the goals page, where they can be edited (Due Dates, Priorities, Steps, KPIs, etc. added).



Copying Goals to other Direct Reports

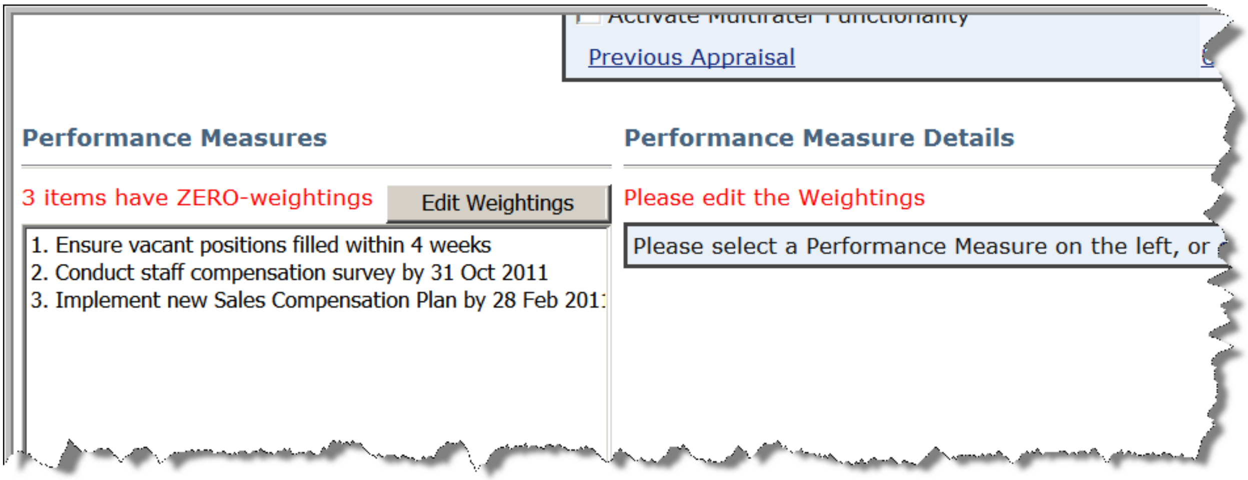
Goals can also be copied from your own or any direct report list of goals, to any one or more other employees. This process is illustrated below:





Copying Goals to Appraisals

Goals can be copied to the Performance Agreements of employees when you are ready to do so. This process is illustrated below:



Summit Goal™ System Alerts

Different alerts will show when copying the goals over to the employee's Appraisal.

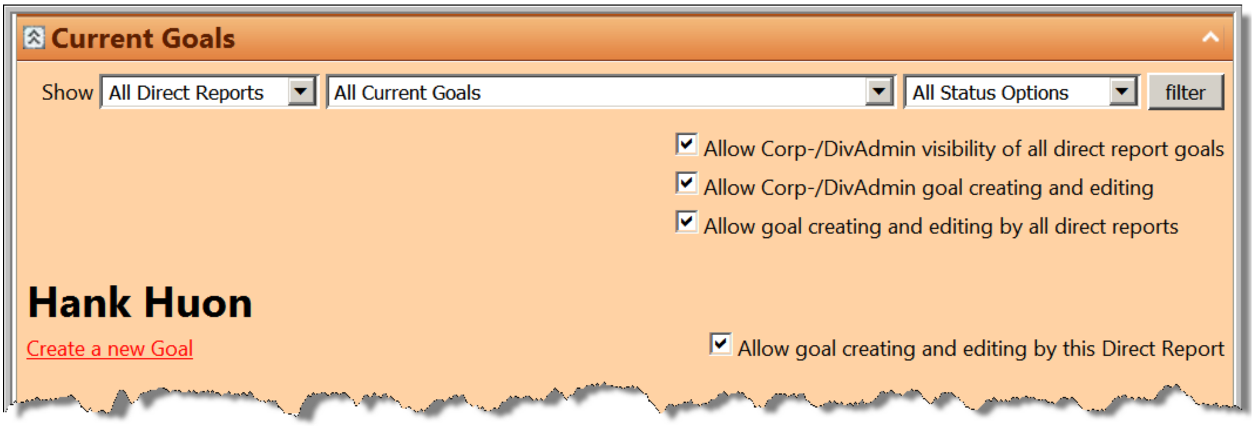
Following is a brief summary:

Employee Current Appraisal Status	System Action
• An Appraisal for this employee does not exist yet:	The Appraisal will be created and the goals copied to it.
• An Appraisal for this employee already exists:	The goals will be added to the measures it already has.
• An Appraisal for this employee already exists, but the Performance Agreement is locked:	The goals will NOT be added to the measures it already has.
• An Appraisal for this employee already exists, but the Summary/POP Form has already been signed off by the Appraisor:	The goals will NOT be added to the measures it already has.

Visibility & Editing Rights

Giving visibility & editing rights to Corp-/DivAdmins & Direct Reports

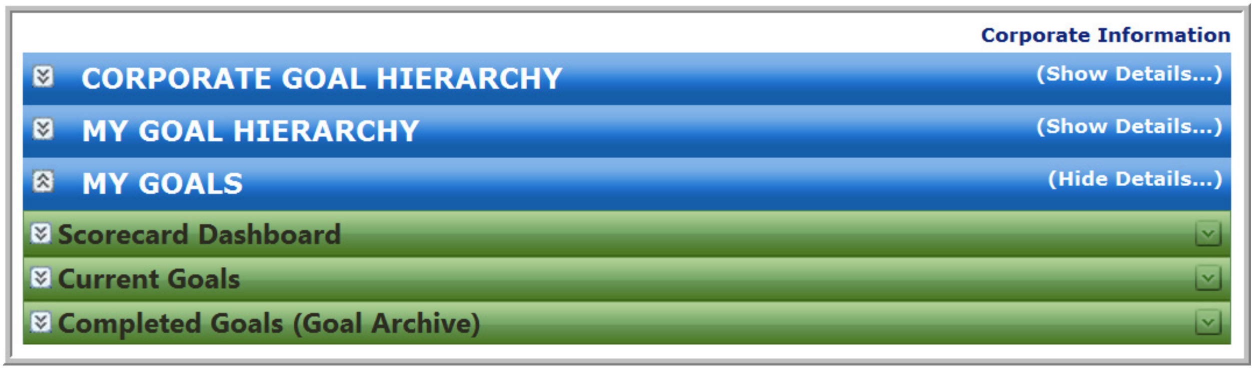
- The default of the system is that Corp-/DivAdmins cannot view or edit the goals of employees, unless their line managers specifically activate the first two tick boxes on the Current Goals page.
- Direct Reports are always able to view the goals set by their managers, but the third tick box need activation for them to be able to edit their goals as well (e.g. to add their own goals for manager approval, or to update the status of their goal completion). Editing rights can also be given to individual employees, as opposed to them all.



Employee Role

Access and Visibility

The employee has access to the following goal hierarchies and pages:



Corporate Goal Hierarchy

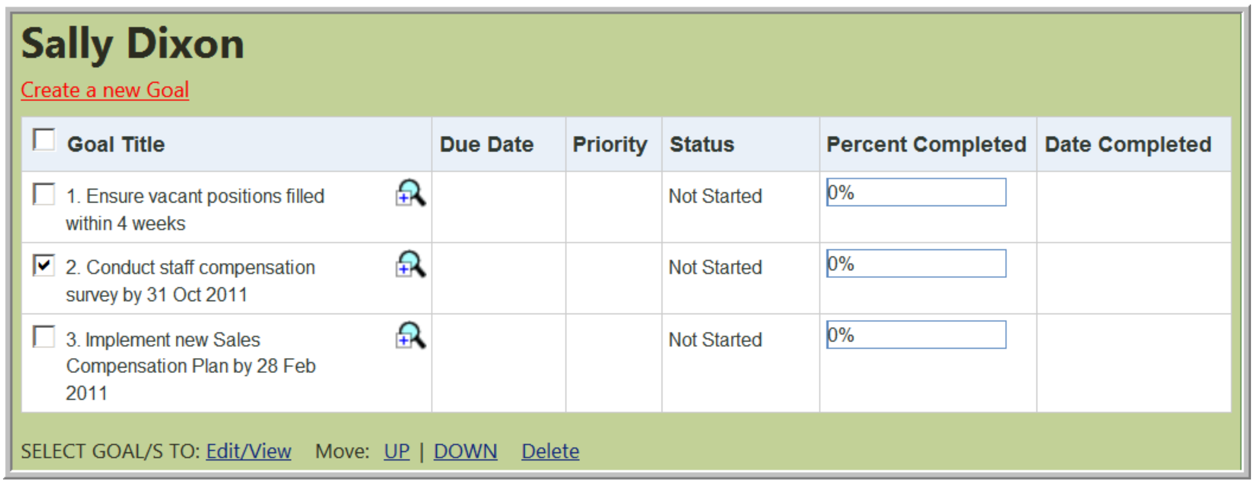
Visibility only if allowed by the CorpAdmin. Goals can be cascaded as well, but only to him/herself.

My Goal Hierarchy

A place where the employee can plan his/her own goals. Goals can be cascaded as well, but only to him/herself.

Current Goals

In the example below, editing rights were given to the employee by her manager. If not, then the goals can only be viewed, but not edited.


Sally Dixon

Create a new Goal

Goal Title	Due Date	Priority	Status	Percent Completed	Date Completed
1. Ensure vacant positions filled within 4 weeks			Not Started	0%	
2. Conduct staff compensation survey by 31 Oct 2011			Not Started	0%	
3. Implement new Sales Compensation Plan by 28 Feb 2011			Not Started	0%	

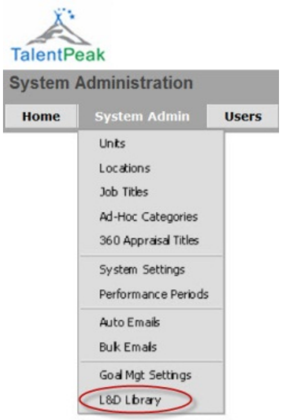
SELECT GOAL/S TO: Edit/View Move: UP | DOWN Delete

TalentPeak
L & D
Learning and Development System

TALENTPEAK™ LEARNING & DEVELOPMENT MANAGEMENT SYSTEM

[Marketing Video Link>> http://www.talent-peak.com/learningmanagement.html](http://www.talent-peak.com/learningmanagement.html)

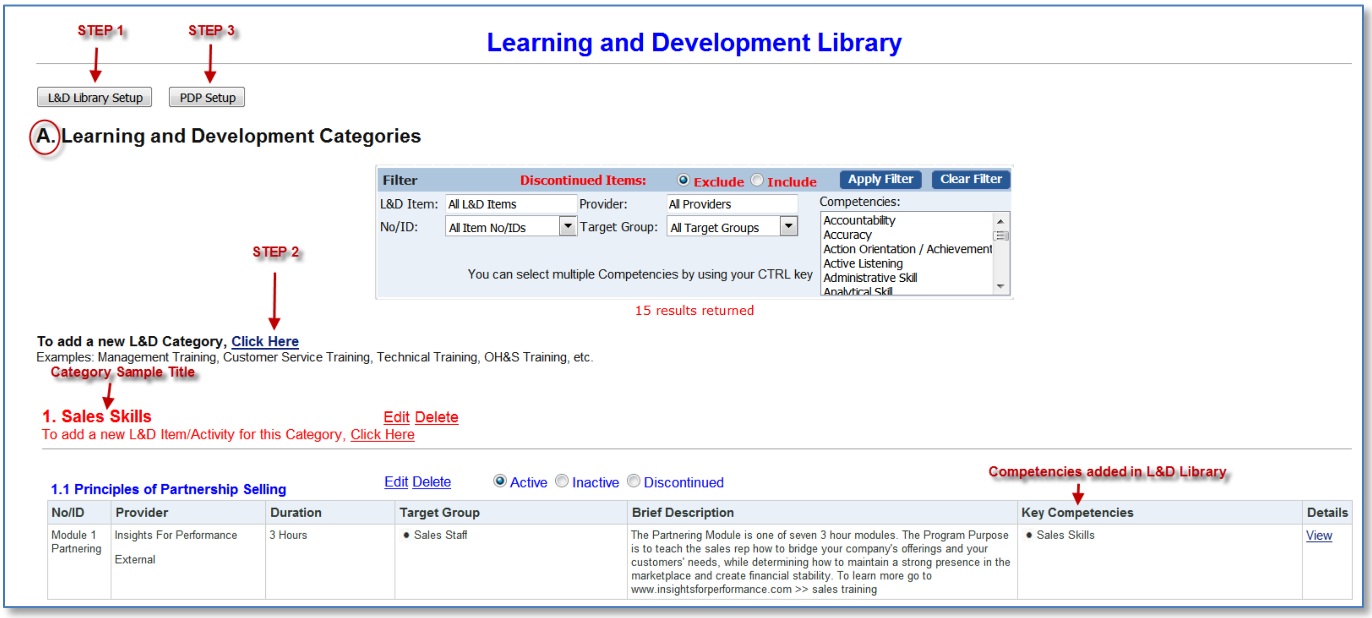
Requires Add-On Module Activation
The **Learning & Development Management Module** is an add-on (extra-cost) system to TalentPeak™ (regular performance appraisals).

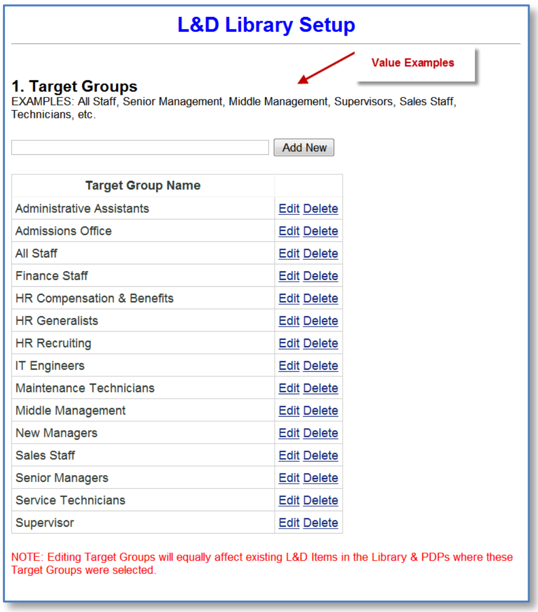


L&D Library Setup – Step 1

The **L&D Library** is the place where you can add all the formal learning/training and development (L&D) activities and interventions that your organization offers to your employees, i.e. all INTERNAL and EXTERNAL courses, seminars, workshops, conferences, etc.

The first thing to do, however, is to set up the **L&D values** that you will need, on the **L&D Library Setup** page. By clicking on the L&D Library tab from within the CorpAdmin System Admin, will open up the L&D library in a separate browser window. Next click the button indicated by the arrow in the screenshot below "Step 1" L&D Library Setup. Follow the instructions and complete each of the 5 sections on the L&D Library Setup webpage.





L&D Library Setup

Value Examples

1. Target Groups
EXAMPLES: All Staff, Senior Management, Middle Management, Supervisors, Sales Staff, Technicians, etc.

Add New

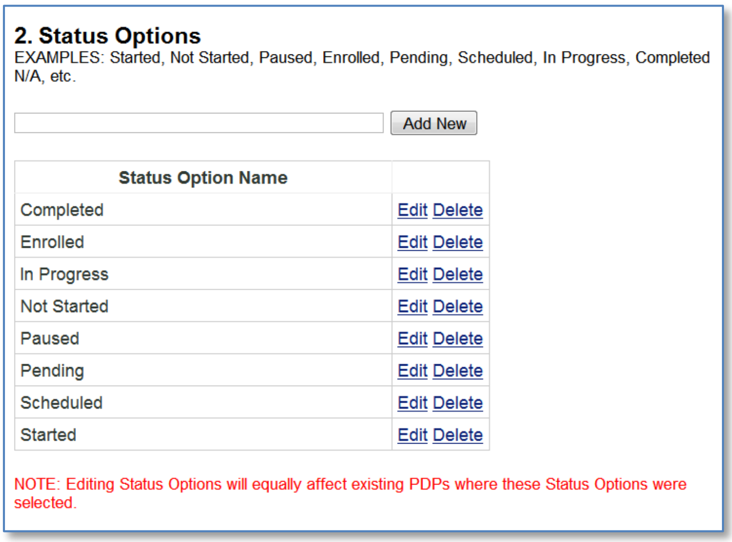
Target Group Name	
Administrative Assistants	Edit Delete
Admissions Office	Edit Delete
All Staff	Edit Delete
Finance Staff	Edit Delete
HR Compensation & Benefits	Edit Delete
HR Generalists	Edit Delete
HR Recruiting	Edit Delete
IT Engineers	Edit Delete
Maintenance Technicians	Edit Delete
Middle Management	Edit Delete
New Managers	Edit Delete
Sales Staff	Edit Delete
Senior Managers	Edit Delete
Service Technicians	Edit Delete
Supervisor	Edit Delete

NOTE: Editing Target Groups will equally affect existing L&D Items in the Library & PDPs where these Target Groups were selected.

Target Groups

Add your organization-specific values using the examples provided to guide you. You can come back any time later to add to or edit your required values.

NOTE: Editing Target Groups will equally affect existing L&D Items in the Library & PDPs where these Target Groups were selected



2. Status Options
EXAMPLES: Started, Not Started, Paused, Enrolled, Pending, Scheduled, In Progress, Completed N/A, etc.

Add New

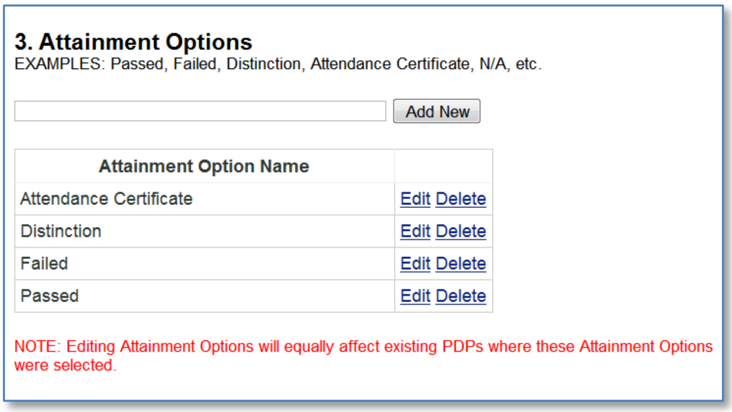
Status Option Name	
Completed	Edit Delete
Enrolled	Edit Delete
In Progress	Edit Delete
Not Started	Edit Delete
Paused	Edit Delete
Pending	Edit Delete
Scheduled	Edit Delete
Started	Edit Delete

NOTE: Editing Status Options will equally affect existing PDPs where these Status Options were selected.

Status Options

Add your organization-specific Status options using the examples provided to guide you.

NOTE: Editing Status Options will equally affect existing PDPs where these Status Options were selected



3. Attainment Options
EXAMPLES: Passed, Failed, Distinction, Attendance Certificate, N/A, etc.

Add New

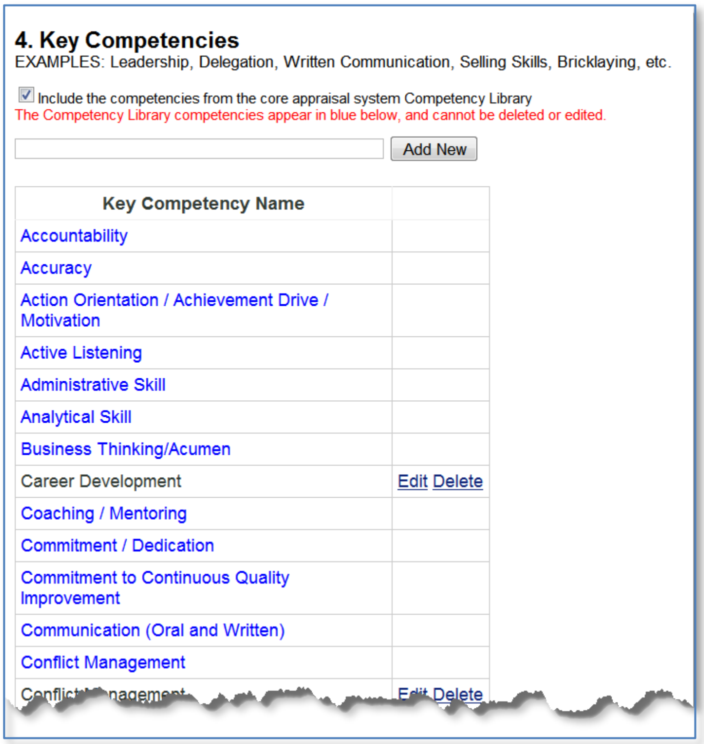
Attainment Option Name	
Attendance Certificate	Edit Delete
Distinction	Edit Delete
Failed	Edit Delete
Passed	Edit Delete

NOTE: Editing Attainment Options will equally affect existing PDPs where these Attainment Options were selected.

Attainment Options

Add your organization-specific Attainment options using the examples provided to guide you.

NOTE: Editing Attainment Options will equally affect existing PDPs where these Attainment Options were selected

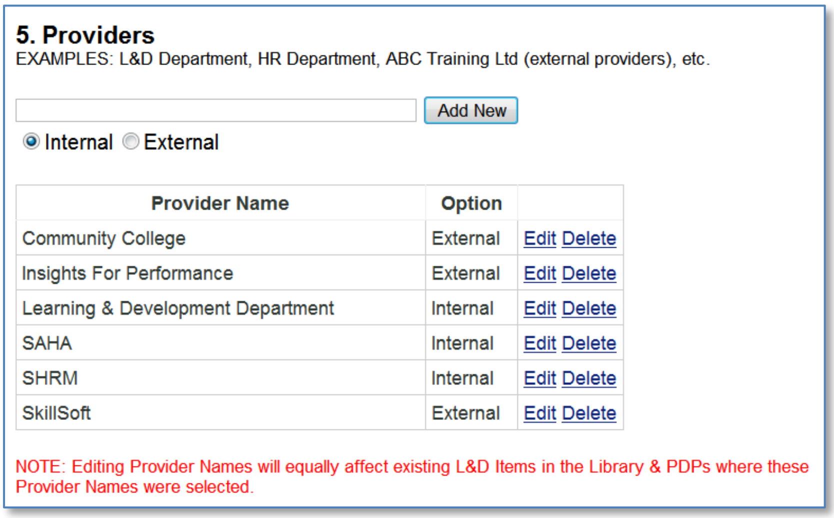


Key Competencies

Add the competencies as covered by the L&D activities you have on offer. Limit these (ideally) to the 1 to 3 (max 5) KEY competencies covered by each L&D activity, so your managers will know which one/s will best address a specific employee learning need.

Selecting the Competencies from the core appraisal system Competency Library will load them; they will be visible in blue are not editable. To add others, enter text into box and click “add new”.

NOTE: Editing Key Competencies will equally affect existing L&D Items in the Library & PDPs where these Key Competencies were selected



Providers

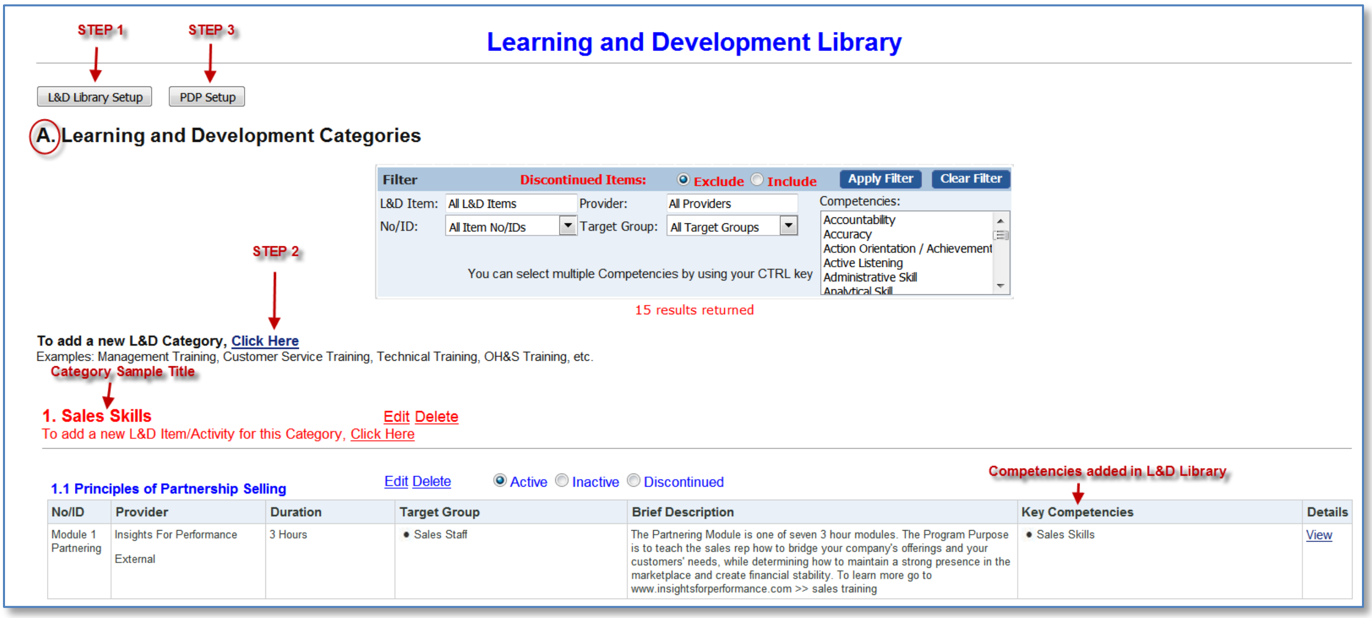
Add your organization-specific name of “Providers” and indicate if they are Internal or External and click “Add New”.

NOTE: Editing Provider Names will equally affect existing L&D Items in the Library & PDPs where these Provider Names were selected

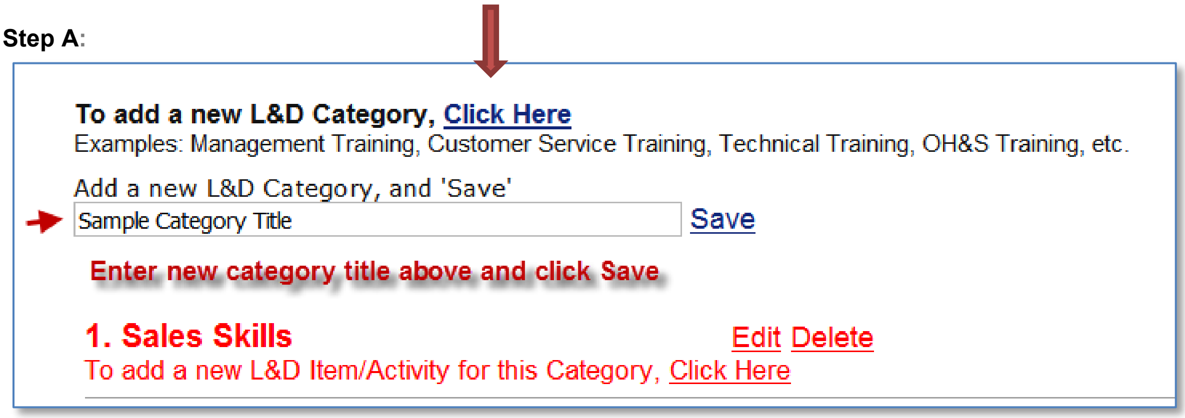
Once completed, scroll to the bottom and select “CLOSE WINDOW” to save. This will return you to the Library View which is open in a separate browser window.

L&D Categories – Step 2

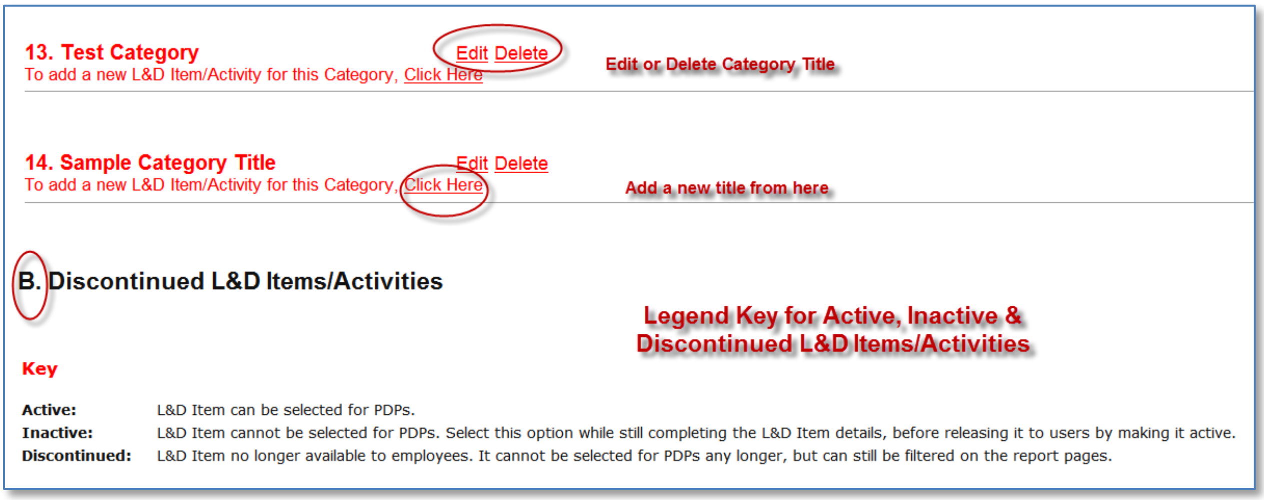
Adding L&D Categories



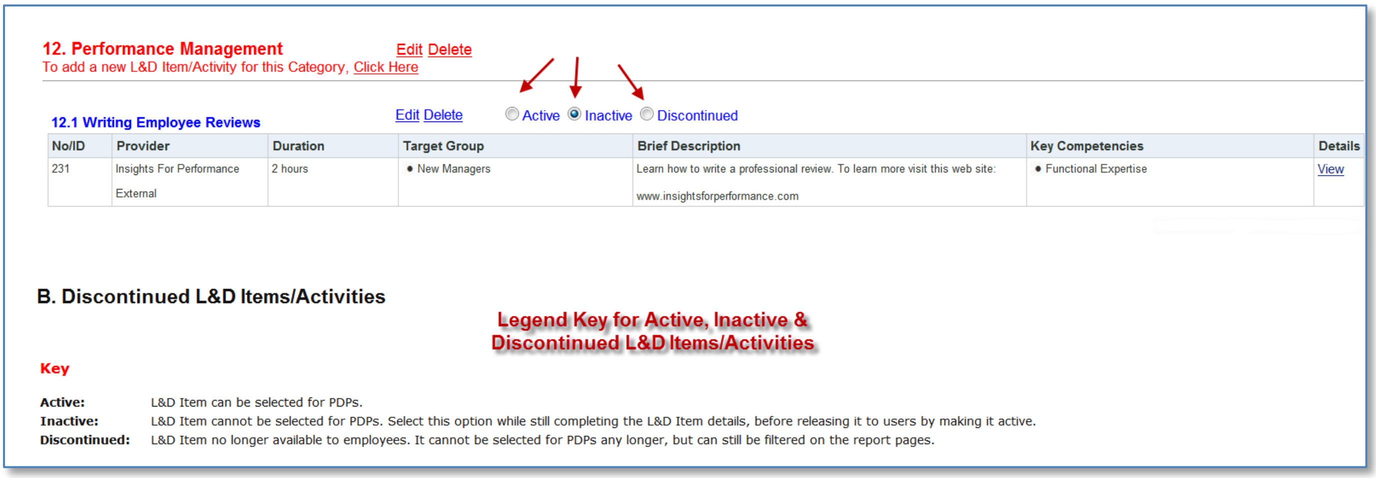
Step A:



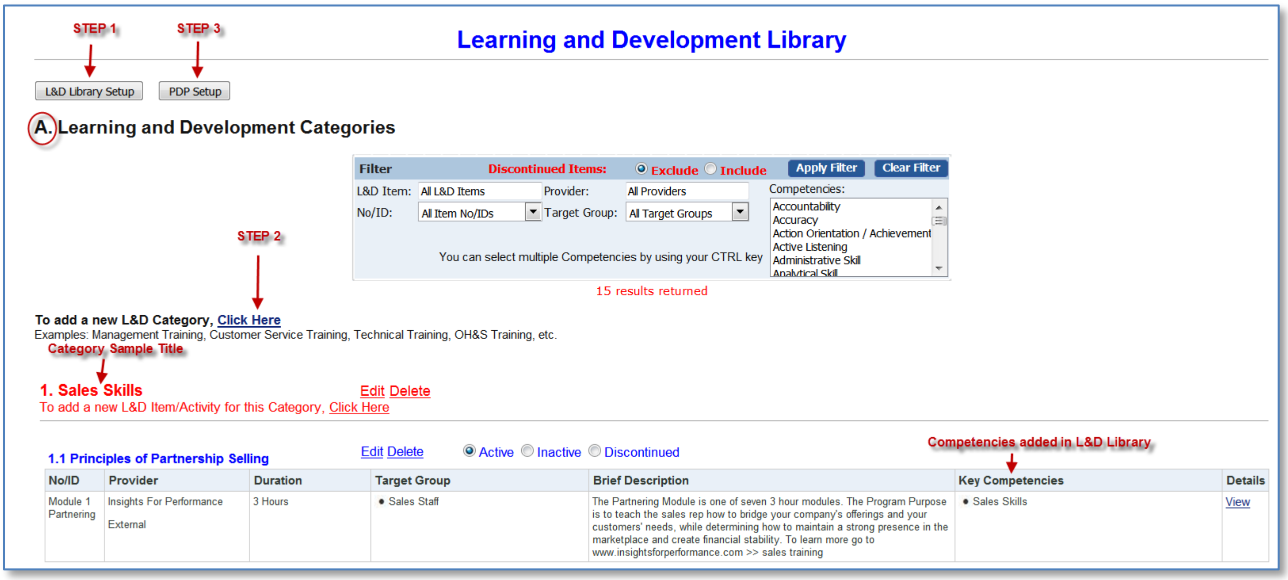
Step B: Scroll down to bottom of page to view your new category



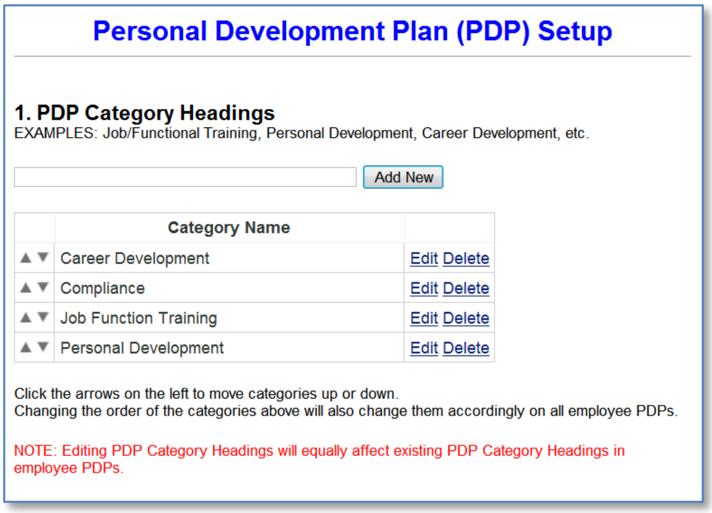
Editing Active or Discontinued L & D Items/Activities



PDP Setup – Step 3



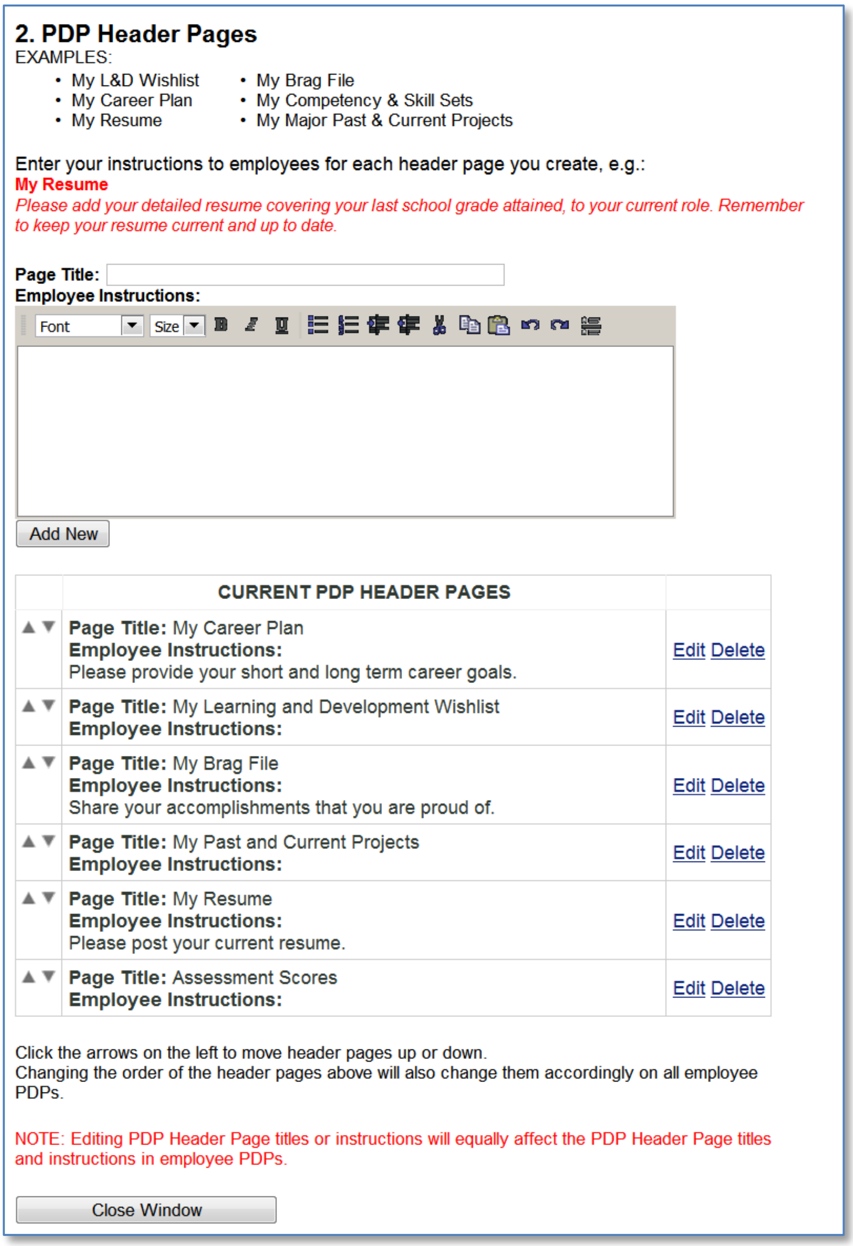
On the **PDP Setup** page (see arrow Step 3 in the screenshot above), you need to set up the **PDP Category Headings** that you want to appear on all employee PDPs.



Adding, Editing or Deleting PDP Category Headings

Add here, the categories of L&D that you want to appear on all employee PDPs. Changing the order here (use up/down arrows) will change it accordingly on all PDPs.

NOTE: Editing PDP Category Headings will equally affect existing PDP Category Headings in employee PDP's



2. PDP Header Pages

EXAMPLES:

- My L&D Wishlist
- My Career Plan
- My Resume
- My Brag File
- My Competency & Skill Sets
- My Major Past & Current Projects

Enter your instructions to employees for each header page you create, e.g.:

My Resume

Please add your detailed resume covering your last school grade attained, to your current role. Remember to keep your resume current and up to date.

Page Title:

Employee Instructions:

Font Size

Add New

	CURRENT PDP HEADER PAGES	
▲▼	**Page Title:** My Career Plan **Employee Instructions:** Please provide your short and long term career goals.	Edit Delete
▲▼	**Page Title:** My Learning and Development Wishlist **Employee Instructions:**	Edit Delete
▲▼	**Page Title:** My Brag File **Employee Instructions:** Share your accomplishments that you are proud of.	Edit Delete
▲▼	**Page Title:** My Past and Current Projects **Employee Instructions:**	Edit Delete
▲▼	**Page Title:** My Resume **Employee Instructions:** Please post your current resume.	Edit Delete
▲▼	**Page Title:** Assessment Scores **Employee Instructions:**	Edit Delete

Click the arrows on the left to move header pages up or down.
Changing the order of the header pages above will also change them accordingly on all employee PDPs.

NOTE: Editing PDP Header Page titles or instructions will equally affect the PDP Header Page titles and instructions in employee PDPs.

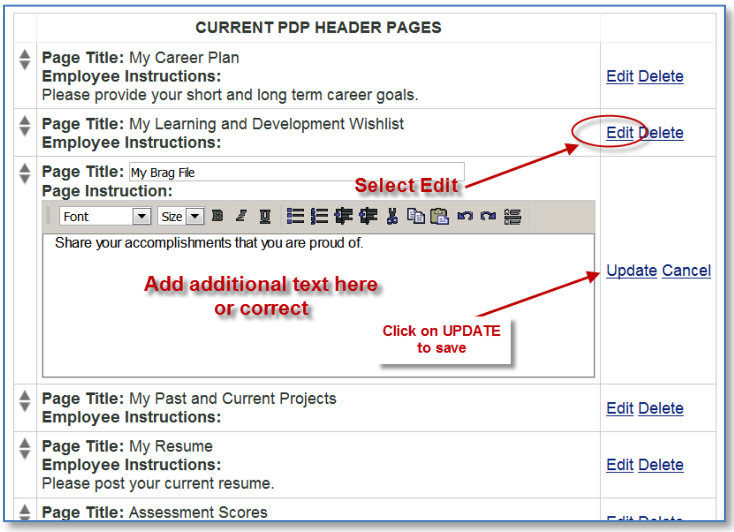
Close Window

Add, Edit or Delete PDP Header Pages

Add here, the PDP header Page Titles that you want to appear on all employee PDPs. Changing the order here (use up/down arrows) will change it accordingly on all PDPs.

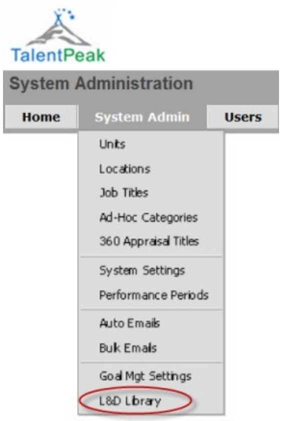
Enter the "Page Title" and any employee instructions using the easy html editor. Click on "Add New" when finished.

NOTE: Editing PDP Header Page titles or instructions will equally affect the PDP Header Page titles and instructions in employee PDPs.

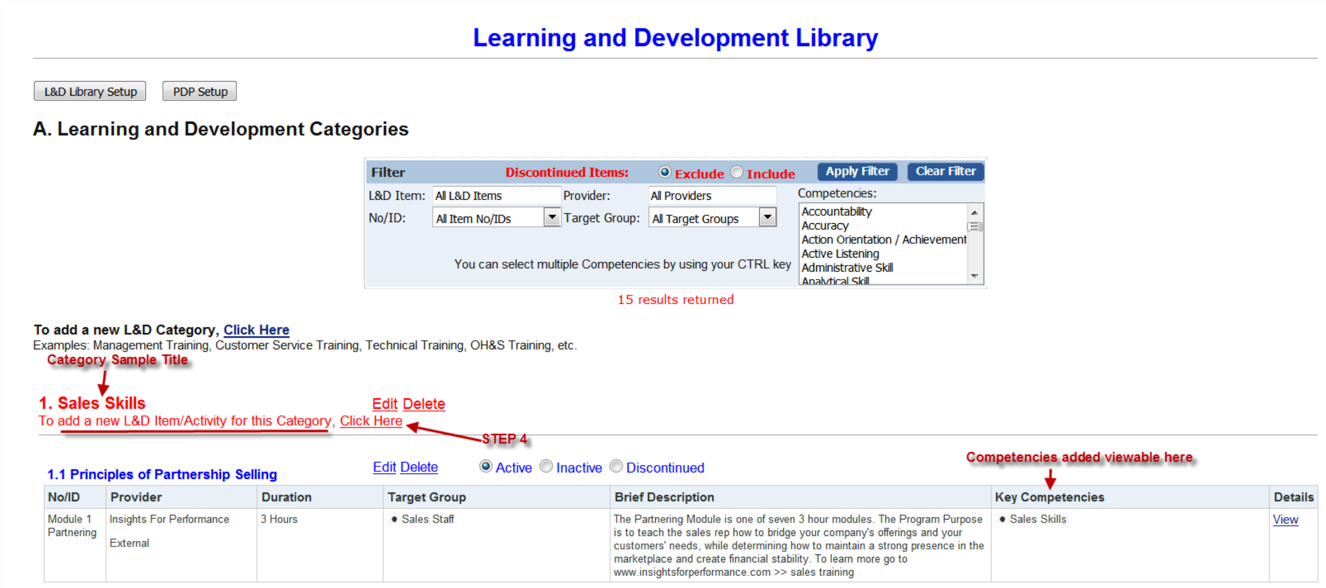


	CURRENT PDP HEADER PAGES	
▲▼	**Page Title:** My Career Plan **Employee Instructions:** Please provide your short and long term career goals.	Edit Delete
▲▼	**Page Title:** My Learning and Development Wishlist **Employee Instructions:**	Edit Delete
▲▼	**Page Title:** My Brag File **Page Instruction:** Font Size Share your accomplishments that you are proud of.	Update Cancel
▲▼	**Page Title:** My Past and Current Projects **Employee Instructions:**	Edit Delete
▲▼	**Page Title:** My Resume **Employee Instructions:** Please post your current resume.	Edit Delete
▲▼	**Page Title:** Assessment Scores	

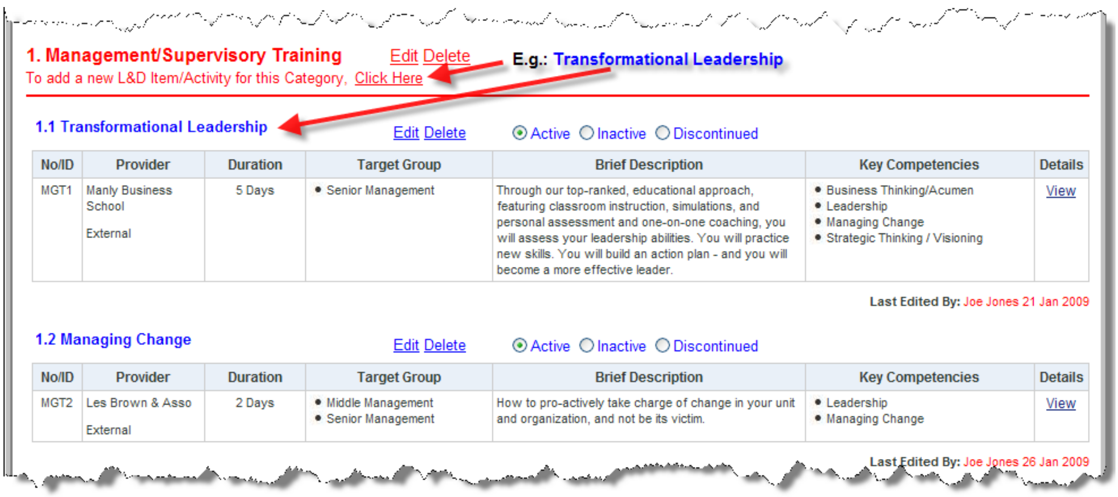
To **edit** any of the current PDP Header pages, select "Edit" and add correction or edit the text in the text editor. Click on UPDATE to Save and close browser window to PDP Set up.



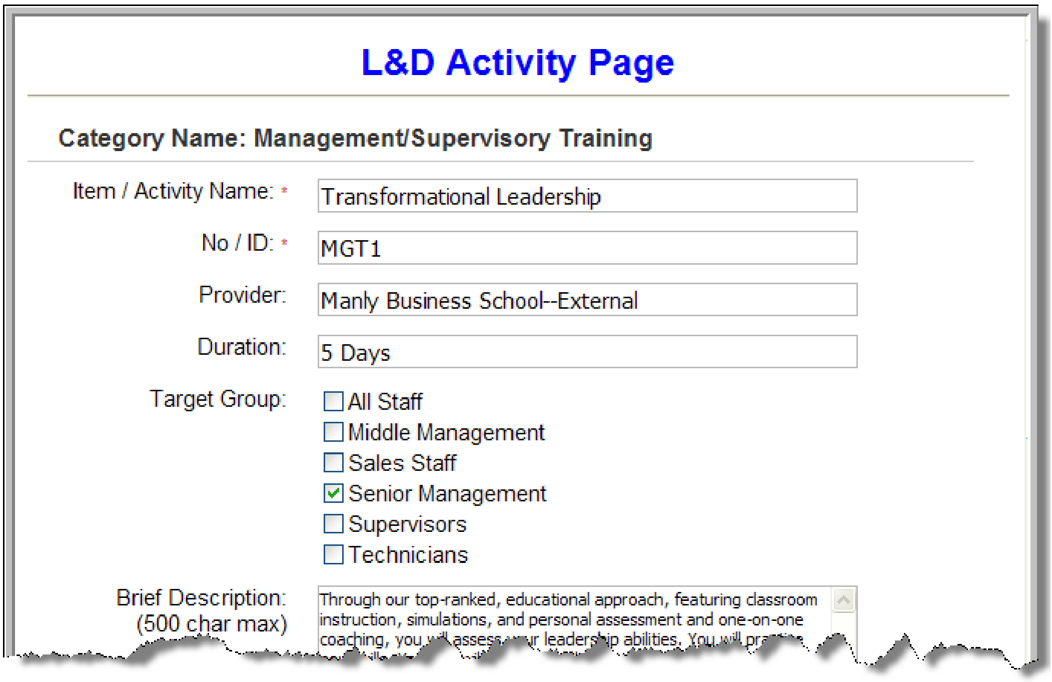
Return to your open browser window for the "Learning & Development Library" or locate it under System Settings>>L & D Library. You should be viewing this page, as seen below



L&D Items/Activities for Each Category – Step 4



When you click "To add a new L&D Item/Activity for this Category, Click Here", a pop-up page will open where you need to enter the details of the L&D activity.



L&D Activity Page

Category Name: Management/Supervisory Training

Item / Activity Name: * Transformational Leadership

No / ID: * MGT1

Provider: Manly Business School--External

Duration: 5 Days

Target Group:
- ☐ All Staff
- ☐ Middle Management
- ☐ Sales Staff
- ☑ Senior Management
- ☐ Supervisors
- ☐ Technicians

Brief Description: (500 char max) Through our top-ranked, educational approach, featuring classroom instruction, simulations, and personal assessment and one-on-one coaching, you will assess your leadership abilities. You will pr...

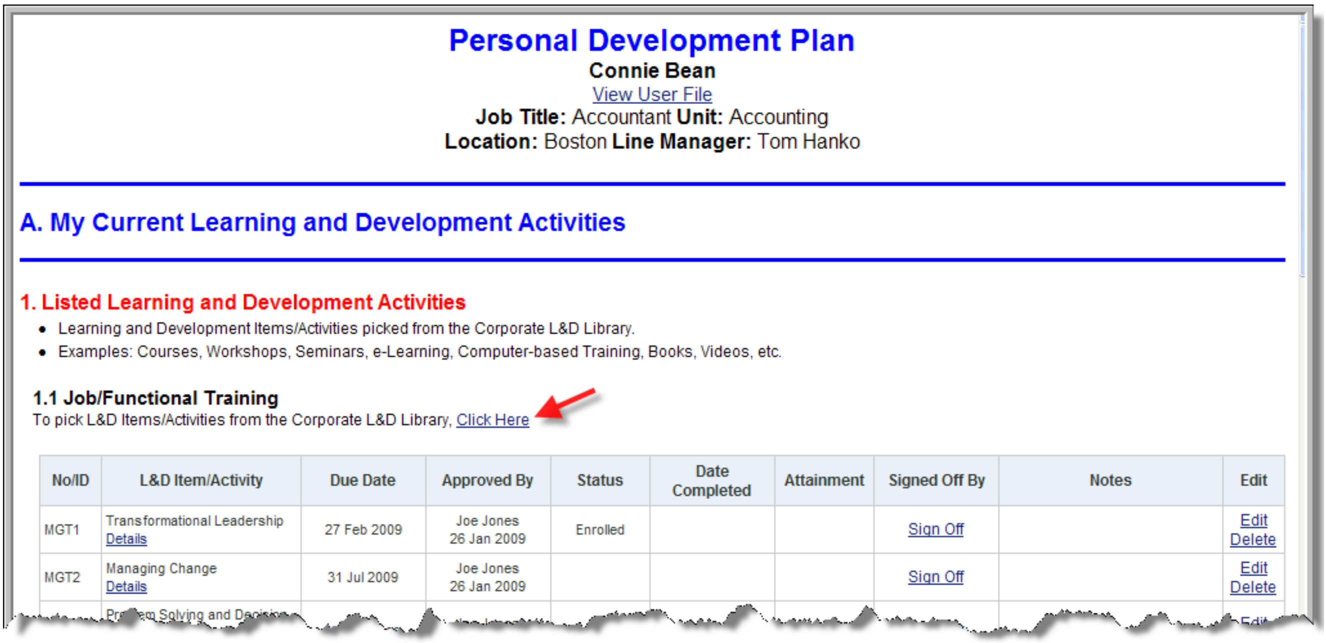
Some notes on completion:

- **No/ID:** Your own L&D Item/Activity Number/ID, or the one provided by an external provider.
- **Duration:** Add number of hours, days, weeks, or months (years?).
- **Competencies:** Select the 1 to 3 KEY (max 5) competencies covered by the L&D activity. Ask an external provider what they are if not provided with their L&D activity write-up.
- **Details:** Any amount of details in respect of the L&D activity can be added here. TIP: First add and edit this in a WORD document, remove all formatting such as bullets, numbering and indents (use Arial 10 font throughout), add colour as required, and only then paste it into the DETAILS section of this page. THEN do all the formatting required by using the editing buttons at the top.
- **Attachments:** Up to two electronic files can be uploaded, such as course application forms and PDF brochures.

Read the **KEY** at the bottom of the L&D Library page to see what the radio buttons (Active, Inactive, and Discontinued) mean.

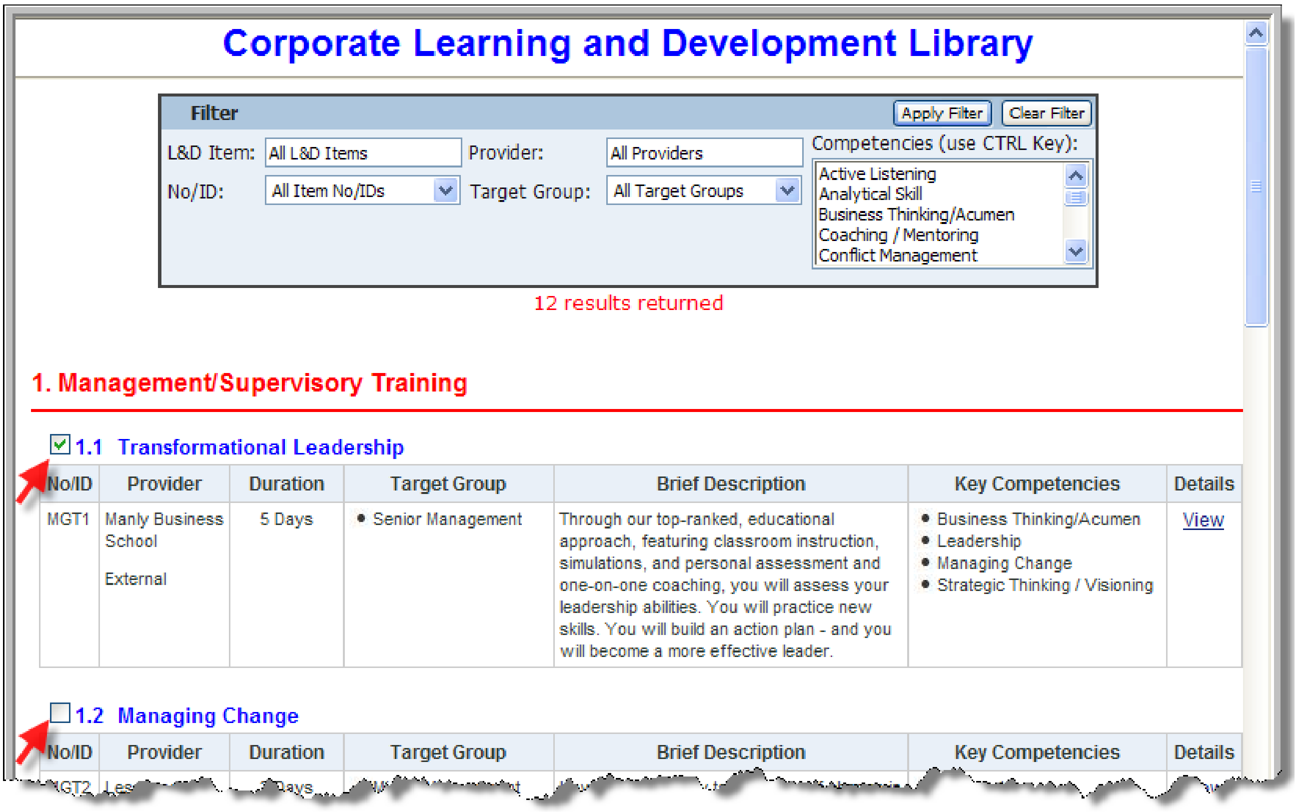
The Personal Development Plan (PDP)

Once a learning need (competency gap) has been established (e.g. through a performance appraisal), the employee's PDP can be opened and suitable L&D activities selected from the L&D Library, for downloading into the PDP (see the last page of this user guide for a broader understanding of potential L&D needs drivers and identification tools/methods).

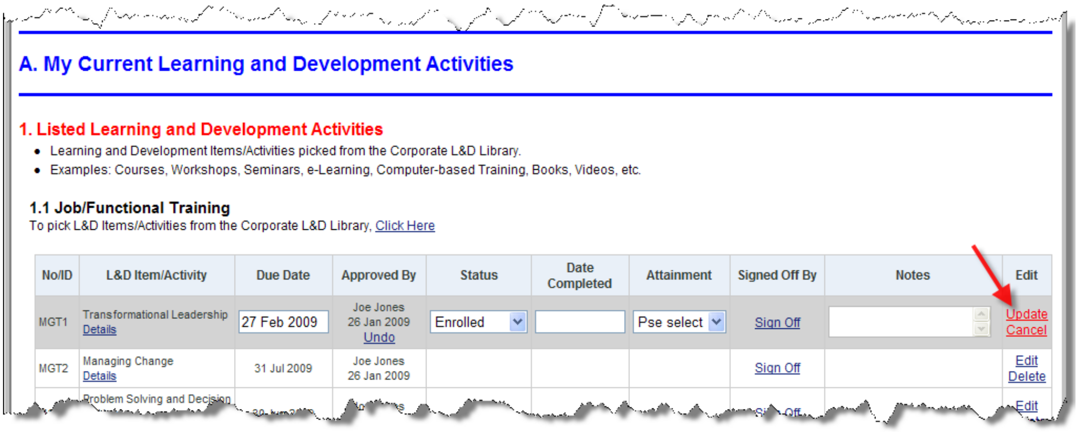


To access the L&D Library from within a PDP, click the link (under the relevant PDP category): "To pick L&D Items/Activities from the Corporate L&D Library, Click Here" (see arrow above)

This will open the L&D Library where the required L&D activities can be selected for downloading to the PDP.



Downloaded L&D activities can now be edited as required.



A. My Current Learning and Development Activities

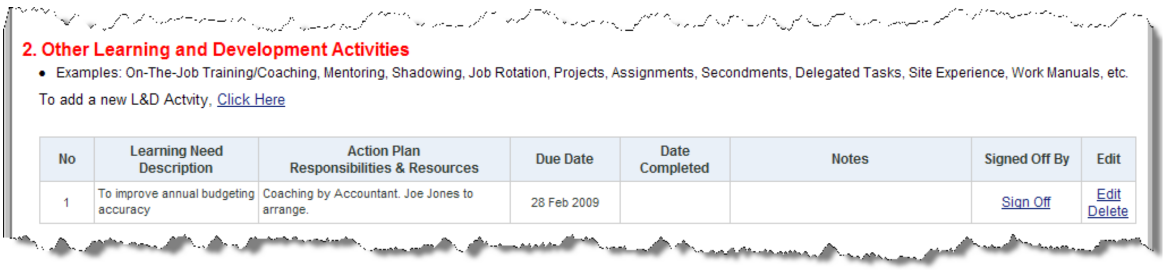
1. Listed Learning and Development Activities
- Learning and Development Items/Activities picked from the Corporate L&D Library.
- Examples: Courses, Workshops, Seminars, e-Learning, Computer-based Training, Books, Videos, etc.

1.1 Job/Functional Training
To pick L&D Items/Activities from the Corporate L&D Library, Click Here

No/ID	L&D Item/Activity	Due Date	Approved By	Status	Date Completed	Attainment	Signed Off By	Notes	Edit
MGT1	Transformational Leadership Details	27 Feb 2009	Joe Jones 26 Jan 2009 Undo	Enrolled		Pse select	Sign Off		Update Cancel
MGT2	Managing Change Details	31 Jul 2009	Joe Jones 26 Jan 2009				Sign Off		Edit Delete
	Problem Solving and Decision								Edit

Some L&D activities will not be formal or classroom-based (i.e. not listed in the L&D Library), but better addressed on the job, such as: On-The-Job Training/Coaching, Mentoring, Shadowing, Job Rotation, Projects, Assignments, Secondments, Delegated Tasks, Site Experience, Work Manuals, etc.

These are added in the **Other Learning and Development Activities** section.

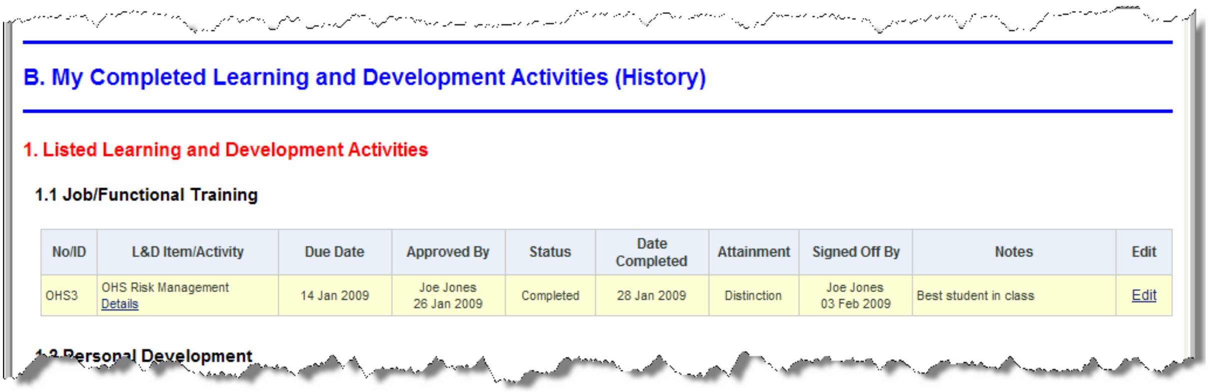


2. Other Learning and Development Activities
- Examples: On-The-Job Training/Coaching, Mentoring, Shadowing, Job Rotation, Projects, Assignments, Secondments, Delegated Tasks, Site Experience, Work Manuals, etc.

To add a new L&D Actvity, Click Here

No	Learning Need Description	Action Plan Responsibilities & Resources	Due Date	Date Completed	Notes	Signed Off By	Edit
1	To improve annual budgeting accuracy	Coaching by Accountant. Joe Jones to arrange.	28 Feb 2009			Sign Off	Edit Delete

L&D activities signed off as successfully completed will move into the HISTORY section of the PDP.



B. My Completed Learning and Development Activities (History)

1. Listed Learning and Development Activities

1.1 Job/Functional Training

No/ID	L&D Item/Activity	Due Date	Approved By	Status	Date Completed	Attainment	Signed Off By	Notes	Edit
OHS3	OHS Risk Management Details	14 Jan 2009	Joe Jones 26 Jan 2009	Completed	28 Jan 2009	Distinction	Joe Jones 03 Feb 2009	Best student in class	Edit

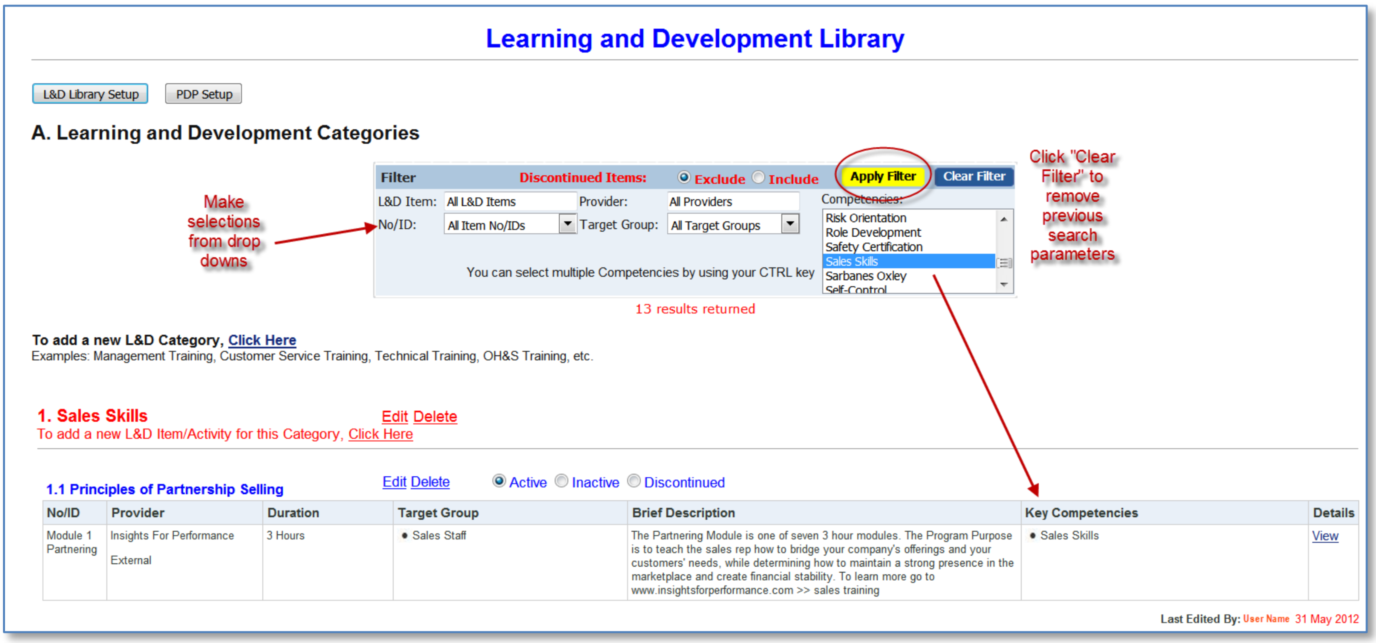
1.2 Personal Development

Establish a policy on editing rights
You will need to establish a policy within the organization as to who are allowed to download L&D activities into PDPs, who may approve attendance of such L&D activities, who may sign them off as successfully completed, etc. (system administrators, HR, or managers; or a combination?).

Should employees be allowed to select L&D activities themselves, or should only the manager do so in consultation with the employee?

NOTE: It is easy to monitor who approved or signed off L&D activities, as the name of that person will be recorded by the system, along with the date.

Filtering Views by Competencies



Competencies

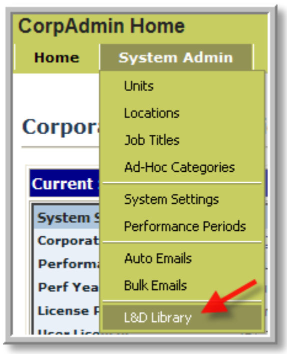
A combination of competencies can be selected (by holding down your CTRL key), to find all L&D activities that cover all selected competencies.

EXAMPLE: If you select the competencies LEADERSHIP and BUSINESS THINKING, and click "Apply Filter", all L&D activities covering both competencies will show in the report. Those L&D activities with only ONE of the two competencies will not show.

Visibility - L & D Module Links/Pages

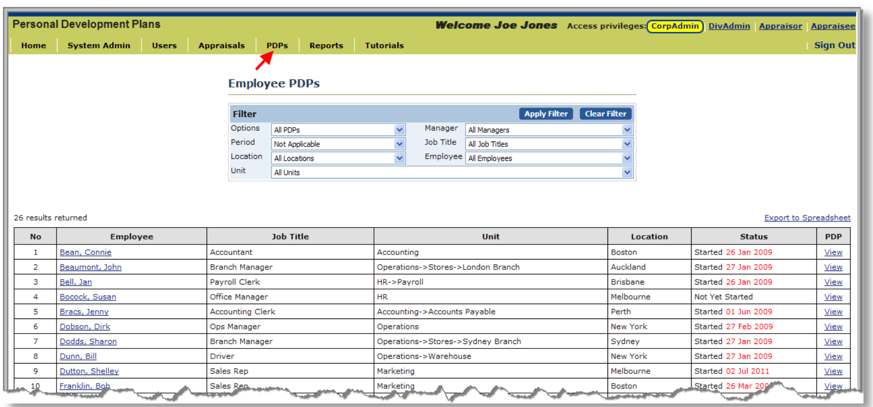
With this module activated, you will find the following additional dropdown menu links and pages:

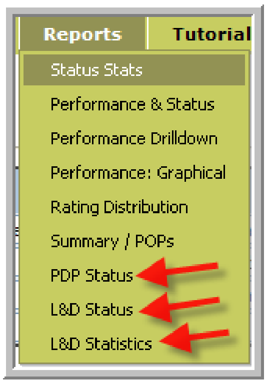
L&D Library Set Up pages



CorpAdmin Views

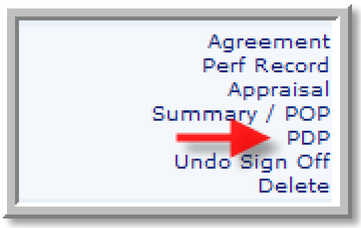
All Employees PDPs page – Filter by All PDP's, Started, Not Started, Locations, Units, Managers, Job Titles or specific Employees





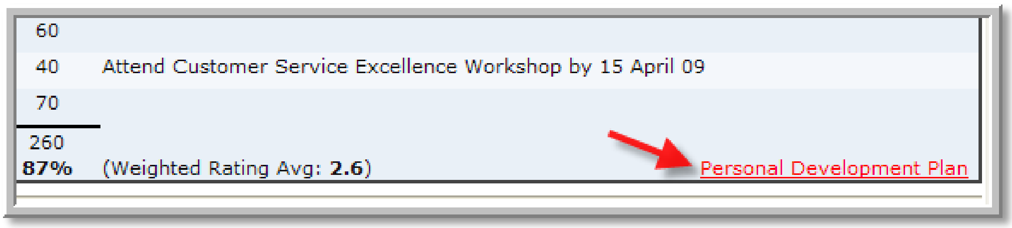
Three Report pages:
1. PDP Status
2. L&D Status
3. L&D Statistics

A PDP link on the Appraisal Manager and Compass 360 Appraisal Manager pages:

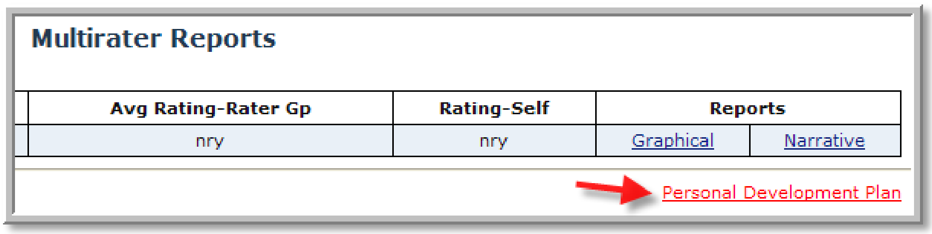


PDP Links inside some system pages (where they are most likely needed to open someone's PDP):

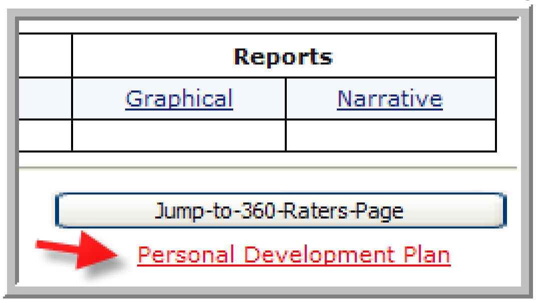
- On the **Appraisal Summary/POP** page



- On the **Multiraters** page

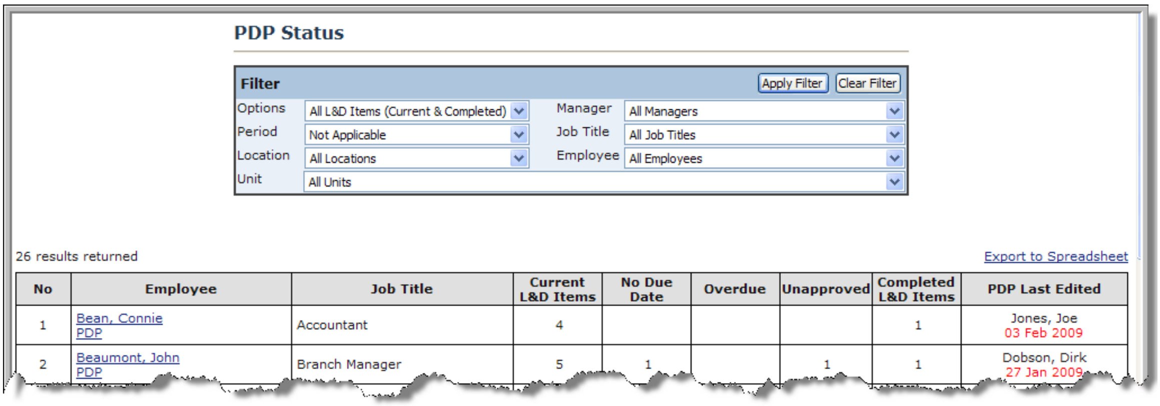


- On the Compass360 **Individual Reports** page



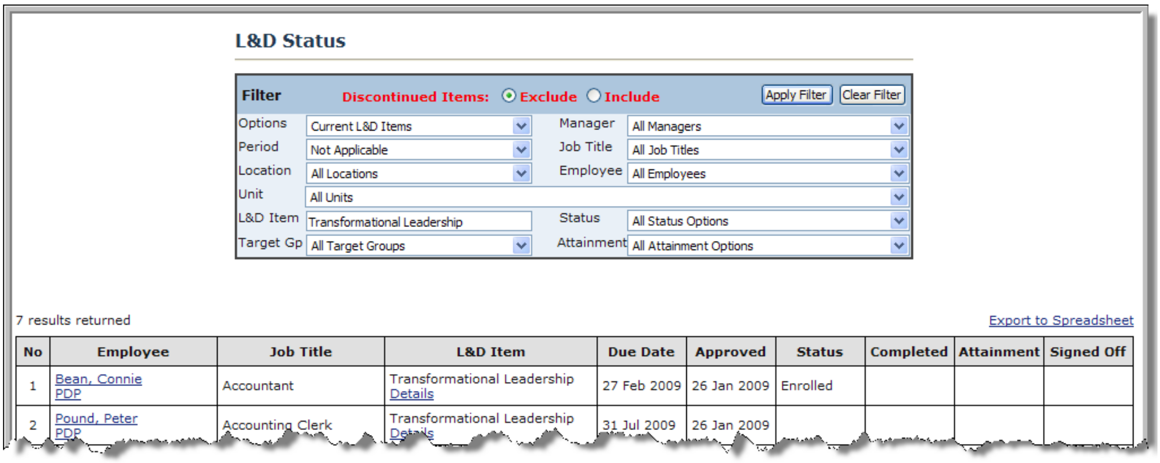
L& D Management System Reports

PDP Status



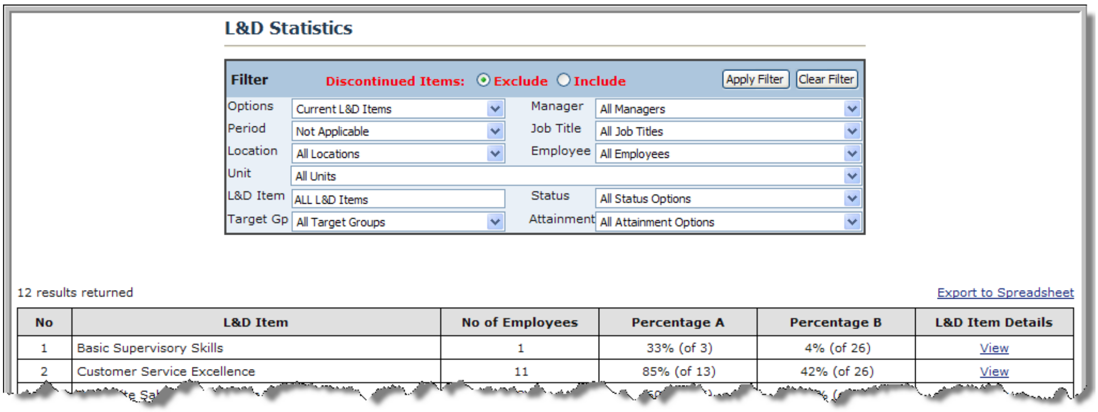
No	Employee	Job Title	Current L&D Items	No Due Date	Overdue	Unapproved	Completed L&D Items	PDP Last Edited
1	Bean, Connie PDP	Accountant	4				1	Jones, Joe 03 Feb 2009
2	Beaumont, John PDP	Branch Manager	5	1		1	1	Dobson, Dirk 27 Jan 2009

L&D Status

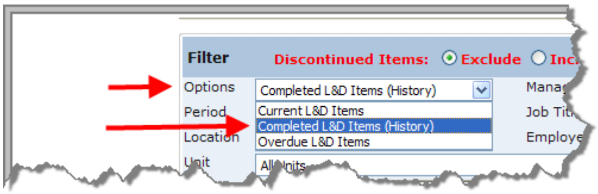


No	Employee	Job Title	L&D Item	Due Date	Approved	Status	Completed	Attainment	Signed Off
1	Bean, Connie PDP	Accountant	Transformational Leadership Details	27 Feb 2009	26 Jan 2009	Enrolled			
2	Pound, Peter PDP	Accounting Clerk	Transformational Leadership Details	31 Jul 2009	26 Jan 2009				

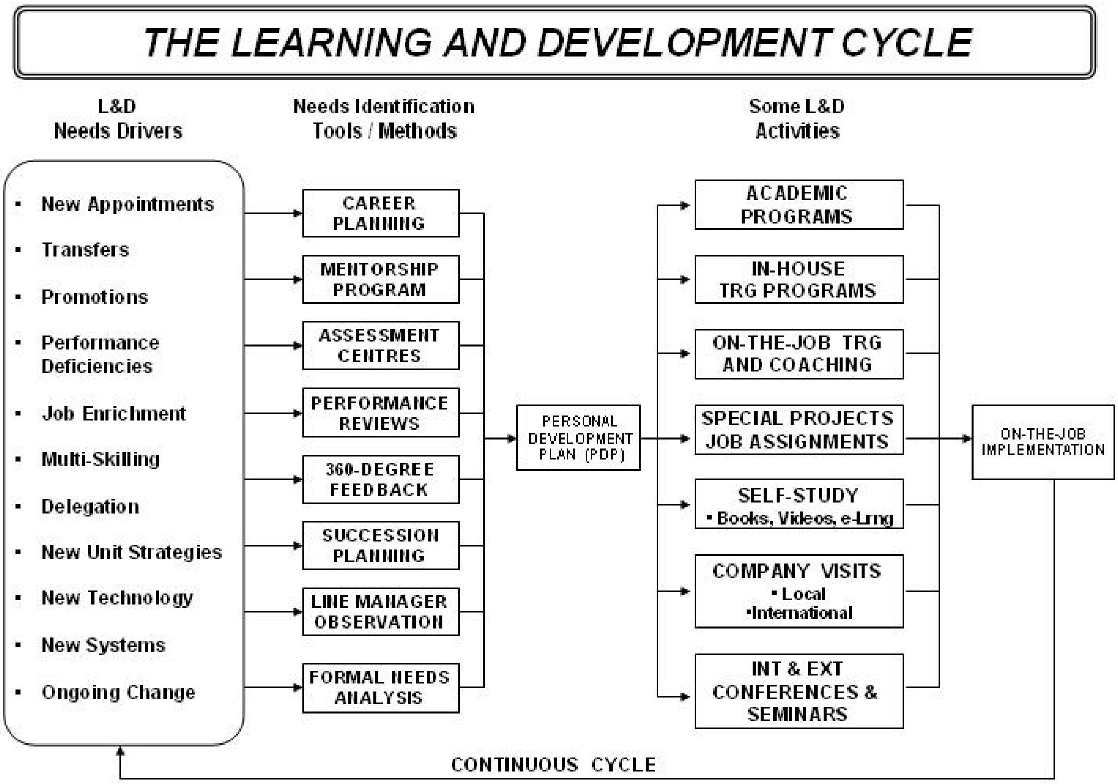
L&D Statistics



Historic Data: All reports have a HISTORY dropdown selection under OPTIONS in the filter to view completed L&D Items:



The Learning and Development Cycle Graphical View



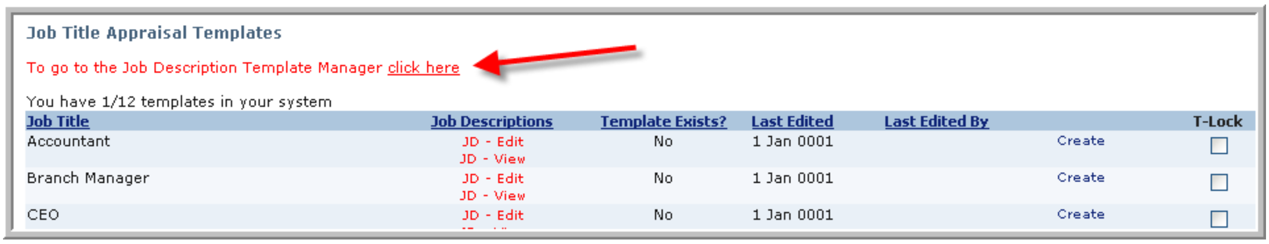
6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

TALENTPEAK™ JOB DESCRIPTION BUILDER

[Marketing Video Link>> http://www.talent-peak.com/jdbuilder.html](http://www.talent-peak.com/jdbuilder.html)

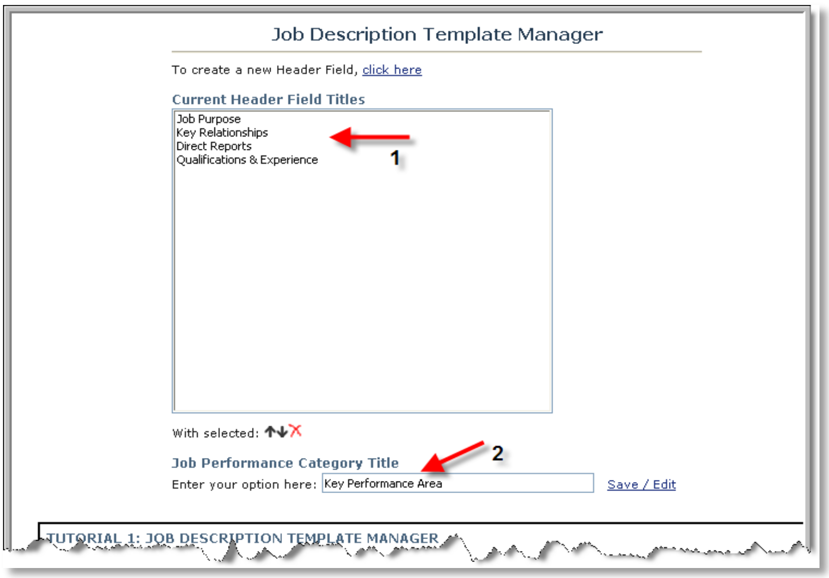
Creating the Job Descriptions from the Template Manager

Step 1. Open the JD Template Manager by clicking the following link (see arrow below) on the Template Manager page:

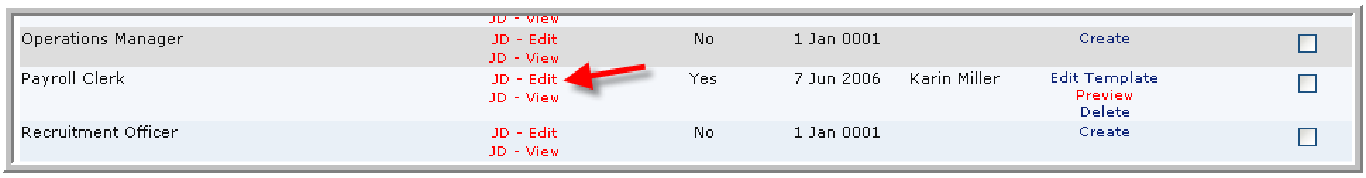


Step 2. Enter the names of Header Fields (as many as you like) (see arrow 1 below). They will be the same for all Job Descriptions.

Step 3. Enter the title of what you want to call your Job Performance Categories (e.g. Key Performance Areas, Key Result Areas, Focus Areas, etc.) (see arrow 2 below). Study the detailed JD Setup Tutorial at the bottom of the JD Template Manager page.

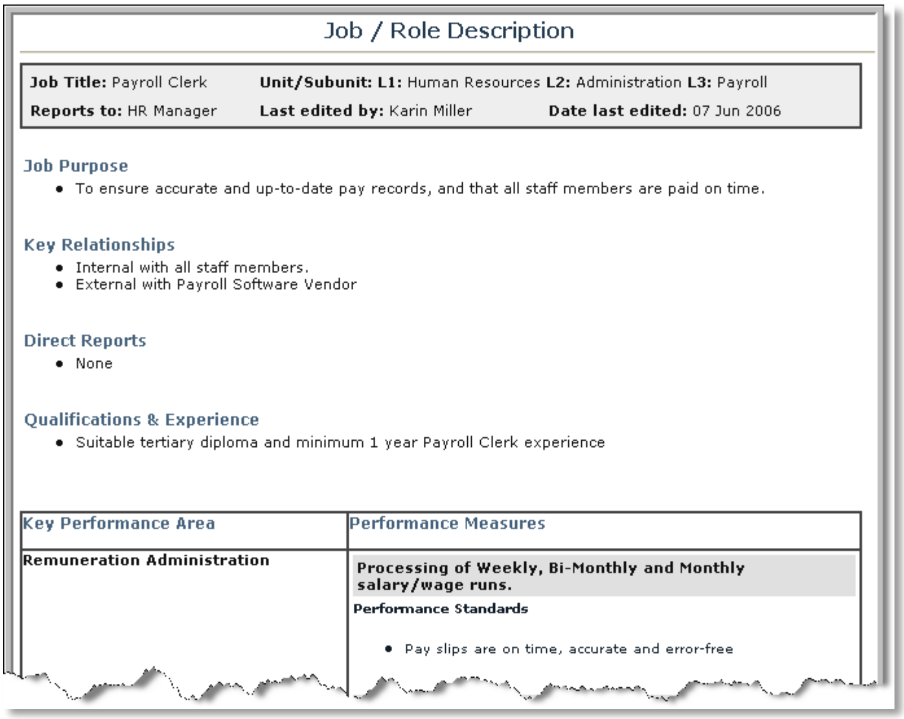


Step 4. Now click JD Edit (see Template Manager Screenshot below) for each individual Job Title to add its unique Job Description contents (see Sample Job Description page 4). Any number of Performance Measures and standards per Job Performance Category can be added. When downloading Competencies, remove those behavioral Indicators not relevant to the specific Job Title/Position – if any (and add additional ones if necessary).



Step 5. After entering the Job Description's contents, click JD View to see what the final product looks like.

See Example below:



Job / Role Description

Job Title: Payroll Clerk **Unit/Subunit: L1:** Human Resources **L2:** Administration **L3:** Payroll
Reports to: HR Manager **Last edited by:** Karin Miller **Date last edited:** 07 Jun 2006

Job Purpose
- To ensure accurate and up-to-date pay records, and that all staff members are paid on time.

Key Relationships
- Internal with all staff members.
- External with Payroll Software Vendor

Direct Reports
- None

Qualifications & Experience
- Suitable tertiary diploma and minimum 1 year Payroll Clerk experience

Key Performance Area	Performance Measures
Remuneration Administration	**Processing of Weekly, Bi-Monthly and Monthly salary/wage runs.** **Performance Standards** • Pay slips are on time, accurate and error-free

PLEASE NOTE:
- Performance Measures and Standards (incl. Competencies) can be transferred from a Job Description to its corresponding Job Title Appraisal Template; one at a time or all in one go (select a default Rating Key first if you want to use the same Rating Key for all measures -- to ensure it gets automatically added to all measures in the Appraisal Template).
- You may not necessarily want to copy ALL Performance Measures from Job Descriptions to Appraisal Templates, but only the most important ones so as to limit the number of measures (including Competencies) to maximum 12 to 15.
- TIP: copy all measures to the Appraisal Template and then delete the less important ones there – if you like to.
- It is recommended that the development of Job Descriptions be first done on "paper" (e.g. MS Word), and then copied and pasted into TalentPeak (JD Edit). Sometimes it may be necessary to copy from Word and then into Notepad to clear out any hidden characters prior to pasting onto the webpage template. *(Please contact IFP support if having difficulties)*
- Performance Measures (including Competencies) can, alternatively, be created directly in Appraisal Templates (without going via Job Descriptions).

Uploading Job Descriptions

Optionally, you can Upload Job Descriptions inside the Job Description Builder which are only viewable from a download link. This is acceptable **if** your Job Descriptions do **not** have specific competencies on the JD pertaining to each specific role. If you want the Job Description to be viewed along with the appraisal agreement, than copy/paste each one into the system as previously described.

Copy Job Descriptions to other Job Titles

The drop down above is pulling from the job titles you have entered under the System Admin settings.

Sample Completed Job Description View from Template Builder

(web-page view)

Your Company Name's Site: Ben616 (180)

Click to print

Job / Role Description

Job Title: Payroll Clerk	**Unit/Subunit: L1:** Human Resources **L2:** Administration **L3:** Payroll	
Reports to: HR Manager	**Last edited by:** Ben Smith	**Date last edited:** 15 Feb 2008

Job Purpose

- To ensure accurate and up-to-date pay records, and that all staff members are paid on time.

Key Relationships

- Internal with all staff members. External with Payroll Software Vendor

Qualifications & Experience

- Suitable tertiary diploma with 1 year minimum Payroll Clerk experience

Key Performance Areas	Performance Measures
Remuneration Administration	**Processing of Weekly, Bi-Monthly and Monthly salary/wage runs** **Performance Standards** • Pay slips done on time, accurate and error-free **Liaising with Accounts Department** **Performance Standards** • Ensure pay runs are checked by senior member of the Accounts team prior to payment • Liaise with Account Manager re the necessary payments to be made into employees' bank accounts **Inland Revenue returns and payments** **Performance Standards** • Filing and payments done by 20th of each month **General Ledger** **Performance Standards** • Generate the journals from reports for each pay run to be posted to the general ledger

	• Reconcile payroll expenses each quarter to the general ledger **Budgeting** **Performance Standards** • Remuneration projections for following year submitted to HR Manager by 30 November of each year **Reporting** **Performance Standards** • Monthly Reports (standard agreed layout followed) to reach HR Manager by 20th of each month • Reports include details on serious deviations from set budgets • Ad-hoc reports filed as dictated by circumstances
Employee Records	**Liaise with HR to ensure all new employees are processed on a timely basis** **Performance Standards** • All relevant documentation completed accurately • Processed within 2 working days of joining **Processing terminations** **Performance Standards** • All relevant documentation completed accurately • Done two working days prior to employee leaving company
Professional Development	**Self-Development** **Performance Standards** • Keep up to date with latest developments in specialist field by reading specialist literature • Attend at least one relevant conference per year on employee remuneration • Attend short courses on employee remuneration as agreed with HR Manager

Examples Below of Job Descriptions that have role specific competencies added:

COMPETENCIES

Accuracy
Works with a high level of precision.
Holds self to rigorous standards.
Is careful to double-check work.
Follows work processes exactly.

Administrative Skill

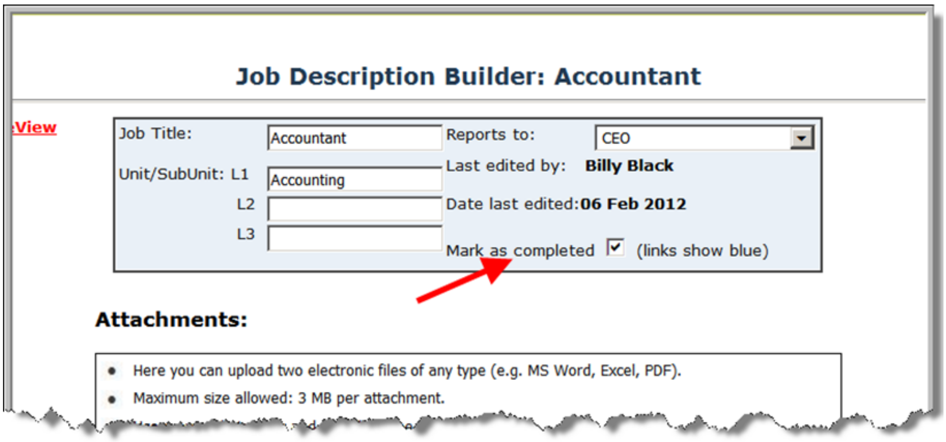
- Is effective at keeping records.
- Prepares documents with care and attention.
- Can retrieve information quickly.
- Helps improve administrative processes.
- Diligently follows organization policies and procedures.
- Prioritizes tasks effectively.
- Is highly organized.
- Is good at multi-tasking.
- Keeps information confidential.

Customer Service (Internal)

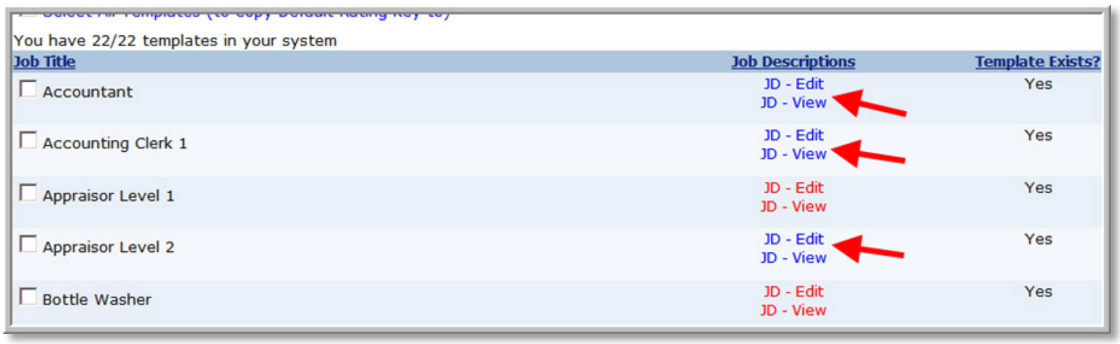
- Builds effective internal customer rapport and relationships.
- Takes a genuine interest in customers.
- Shows energy and enthusiasm in satisfying customer needs.
- Tends to over-deliver, rather than over-promise.
- Excels at providing excellent customer support and follow-up.
- Responds to customer inquiries and complaints promptly.

Marking Job Descriptions Completed & Releasing to Staff

Navigate to the top of the JD Edit page and tick the box “Mark as completed” to release the Job Description

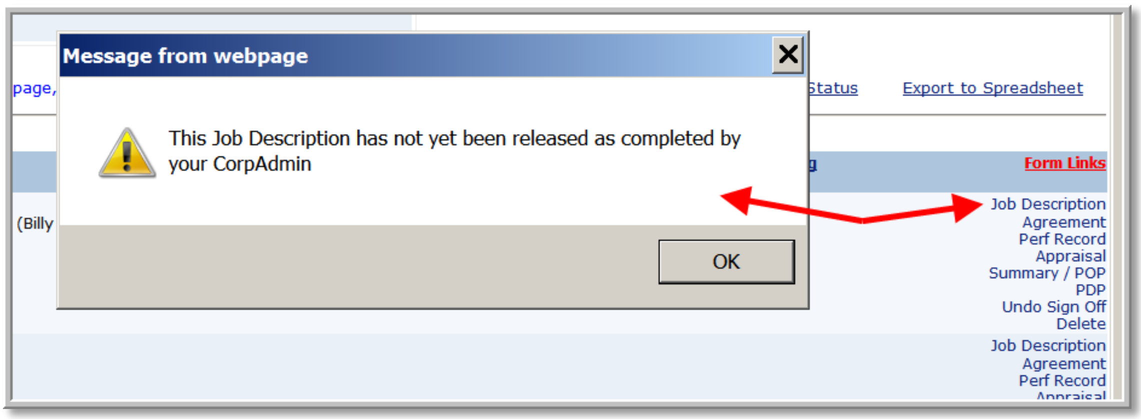


The links on the Template Manager page now turn blue, as a visual indication that it has been completed, so the rest, still to be completed, can be easily identified…


You have 22/22 templates in your system

Job Title	Job Descriptions	Template Exists?
Accountant	JD - Edit JD - View	Yes
Accounting Clerk 1	JD - Edit JD - View	Yes
Appraisor Level 1	JD - Edit JD - View	Yes
Appraisor Level 2	JD - Edit JD - View	Yes
Bottle Washer	JD - Edit JD - View	Yes

Job Descriptions **not marked** as completed will not be viewable on the Appraisal Manager page. Clicking the link will trigger the following alert:



This gives you full control as to when to release your Job Descriptions to managers and staff.

Export your Job Titles to Excel

For easier reference you can now export to Excel all of your job titles

TalentPeak

TALENTPEAK™ MULTIRATER MODULE

Marketing Video Link>> http://www.talent-peak.com/multirater.html

What is the Multirater Module?

The Multirater Functionality allows you to, as part of the "regular" and/or “ad-hoc” Performance Appraisals, request up to FIVE "other" (Multi-) raters to provide input to an employee's performance.

This functionality is highly suitable for matrix organisations, but also if you have employees who work with (or have worked with) more than one manager/supervisor during a performance period.

Such Multiraters are notified by a system-generated email to log into the system, and to complete the online Appraisal Questionnaire of the Appraisee.

The input of all Multiraters appears jointly on two system-generated reports:

- A **Narrative Report** that combines the (averaged) ratings and written comments of all Multiraters onto one page.
- A **Graphical Report** that presents the results as FOUR different types of Bar Charts.

The direct line manager of the employee can be included as another Multirater, so his/her input can get added to those of the other Multiraters as well.

Appraisees can be requested to complete a Multirater Self-Appraisal as well. The two reports, mentioned above, will then reflect how the Appraisee's ratings and comments compare to those of the other Multiraters jointly.

Managers (Appraisors) will then be able to view these comprehensive results in preparation of the Appraisal Interview and/or to base the completion of the Official Appraisal Form on.

Please note: The Multirater Functionality is totally different from the Compass360™ System.

Multirater and Compass 360 Comparison

What is the difference between the Multirater and the Compass 360-Degree Feedback?

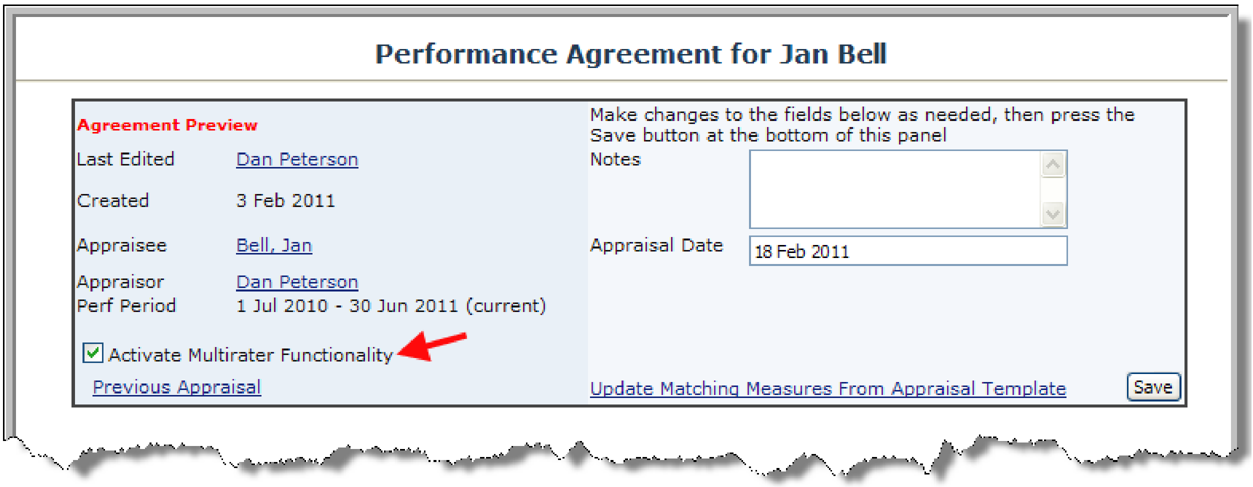
Multirater	Compass 360-Degree Feedback
Forms part of "regular" or “ad-hoc” performance appraisals, needs to be activated or enabled as an option. (Contact IFP)	Separate from "regular" or “ad-hoc” performance appraisals. Can be activated as an add-on module, or used as a fully independent, "stand-alone" system.
PRIMARY PURPOSE: To get input on an employee's work output/performance, from all managers (incl. project managers), supervisors and team leaders an employee has worked with during a performance period. (Could be used as input into employee performance-based remuneration.)	PRIMARY PURPOSE: To get input on an employee's work behaviour and competence as perceived by significant "other" people the employee has worked with over the performance period - for the purposes of employee development, and personal self-awareness & growth. (Should preferably not be used as input into performance-based remuneration.)
The performance measures to be assessed by all Multiraters are the same as those in the Appraisee's Performance Agreement (regular or ad-hoc appraisals).	An unlimited number of 360 Questionnaires can be created for any number of 360 target groups or purposes.
Multiraters are selected from internal employees only.	Multiraters can be external as well, e.g. external customers.
Up to 5 Multiraters per appraisal are allowed (Appraisee self-appraisals excluded).	Up to 20 Multiraters per 360 appraisal are allowed (Appraisee self-appraisals excluded).
When activated, the Multirater functionality is automatically available for all employees, with every performance period (one per performance period with regular appraisals, but any number with ad-hoc appraisals).	360 Appraisals are individually created for selected employees as required (more than one per employee per performance period can be created).

What is the difference between Regular and Ad-Hoc Multirater Appraisals?

Regular MULTIRATER Appraisals	Ad-Hoc MULTIRATER Appraisals
You can create one Multirater Appraisal per Appraisee per performance period.	You can create any number of Multirater Appraisals per Appraisee per performance period.
The performance measures to be assessed by all Multiraters are the same as those in the Appraisee's regular appraisal Performance Agreement.	The performance measures to be assessed by all Multiraters are the same as those in the Appraisee's ad-hoc appraisal Performance Agreement, but these measures can be customized for diverse and specific purposes, e.g. 90-Day Probation, Promotions, and Performance Improvement, as well as Direct Report, Peer and Internal Customer Feedback (i.e. “mini” 360s limited to five Raters; one Rater Group per Multirater Appraisal).
Multiraters should be current or previous line or project managers the Appraisee has worked with during a performance period.	Multiraters could be line or project managers, direct reports, peers or internal customers the Appraisee has worked with during a performance period.

Creating a Multirater Appraisal

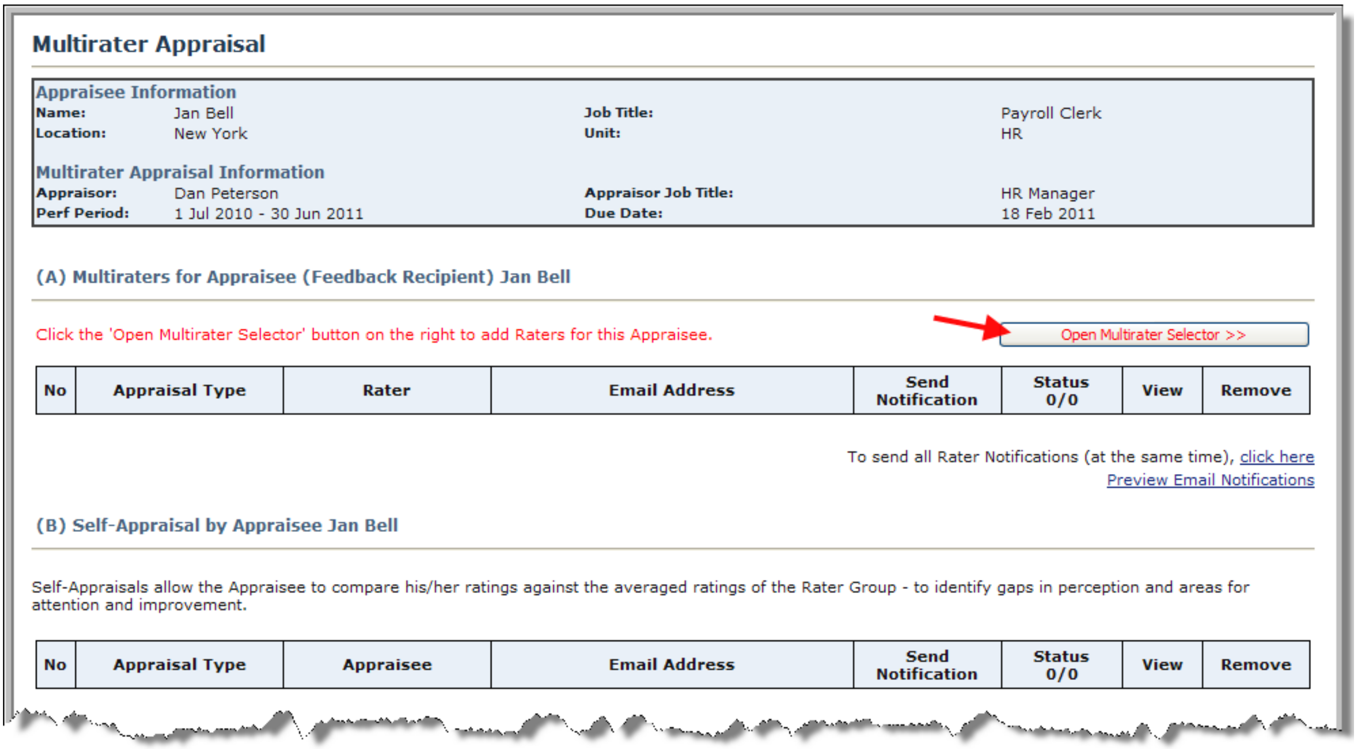
With the Multirater Module activated, the following tick-box will show on the **Performance Agreement Form** ("Agreement" link) of Appraisees:



By ticking this box, a new link will appear for the employee on the **Appraisal Manager** page, called 'MULTIRATERS'.

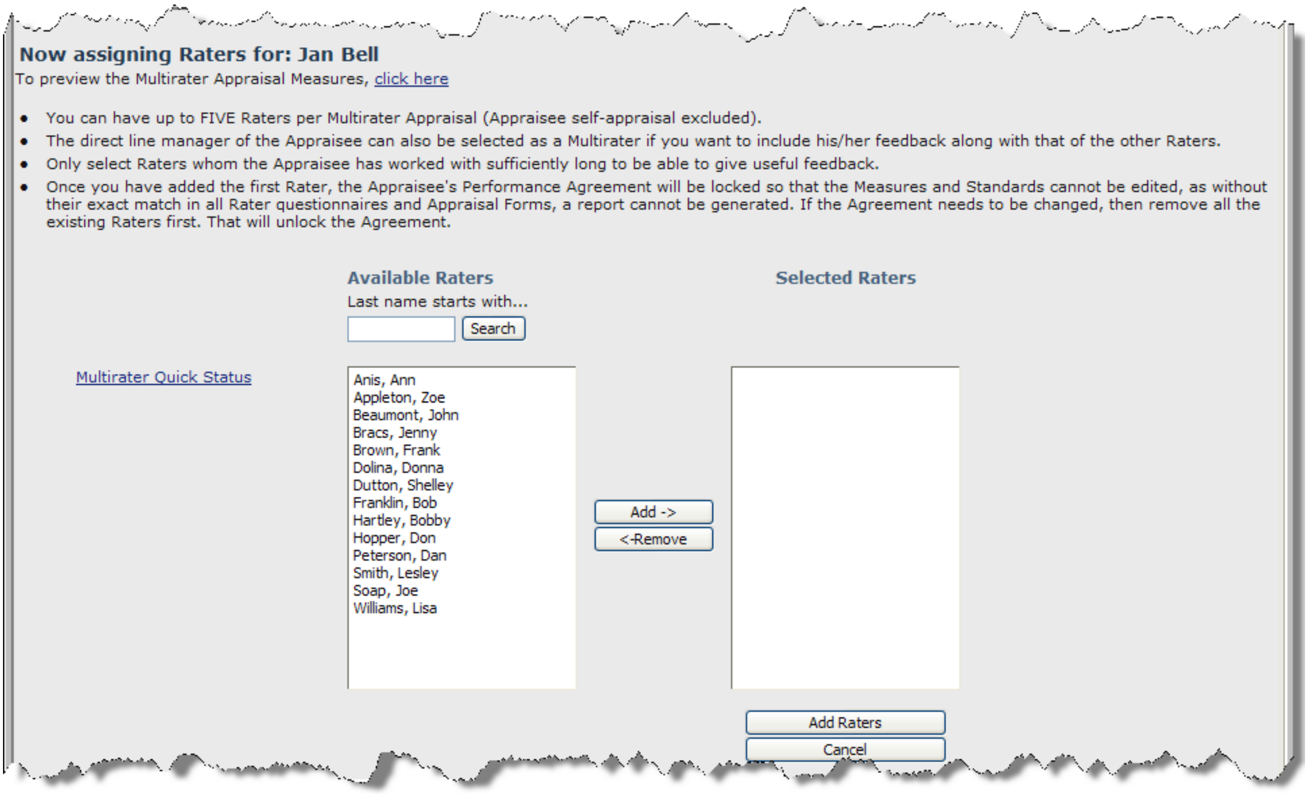
And by clicking this MULTIRATERS link, the following page will open:

Multirater Appraisal Page



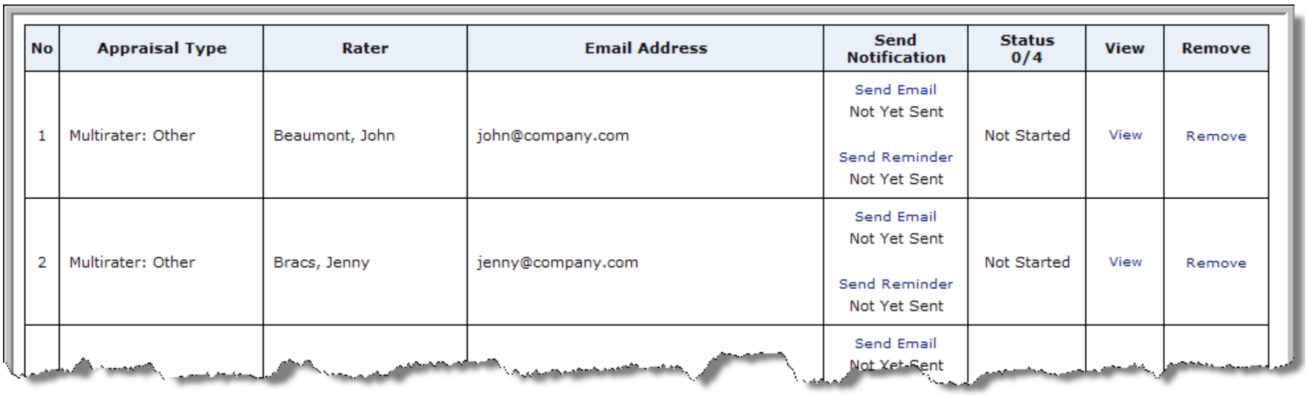
Assign Multiraters

Click the **Open Multirater Selector** button (see red arrow in above screenshot), to open the following page:



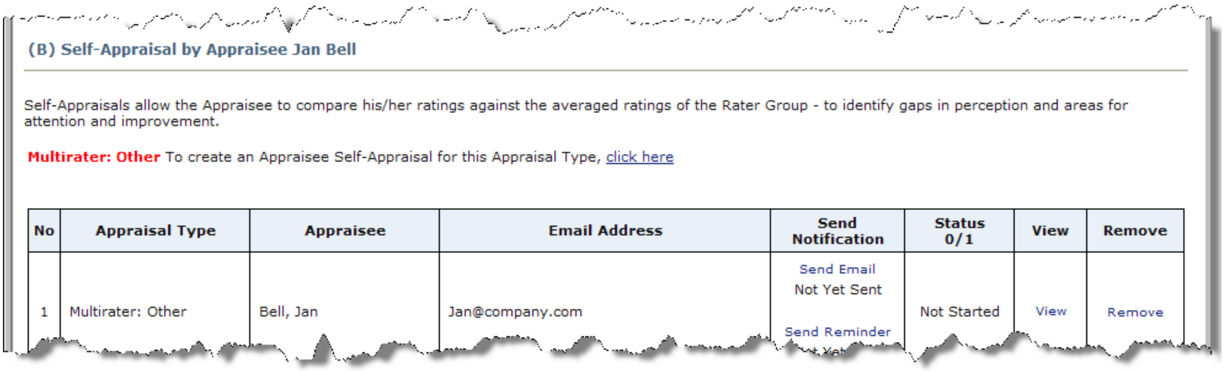
All **internal users/employees** will show in the "Available Raters" field – to select from as Multiraters for the employee (please follow the instructions).

The **Raters** (once added) will show in a table as follows:



No	Appraisal Type	Rater	Email Address	Send Notification	Status 0/4	View	Remove
1	Multirater: Other	Beaumont, John	john@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	View	Remove
2	Multirater: Other	Bracs, Jenny	jenny@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	View	Remove
				Send Email Not Yet Sent			

The **Appraisee Self-Appraisal** shows in a separate table on the same page. It is optional to require the Appraisee to do a Self-Appraisal via the Multirater functionality. Companies need to decide whether employees should complete this, or just the Appraisal Prep Form (or both).


(B) Self-Appraisal by Appraisee Jan Bell

Self-Appraisals allow the Appraisee to compare his/her ratings against the averaged ratings of the Rater Group - to identify gaps in perception and areas for attention and improvement.

Multirater: Other To create an Appraisee Self-Appraisal for this Appraisal Type, click here

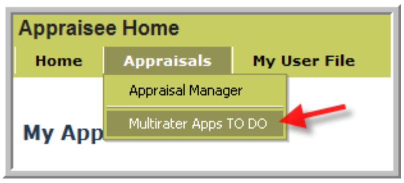
No	Appraisal Type	Appraisee	Email Address	Send Notification	Status 0/1	View	Remove
1	Multirater: Other	Bell, Jan	Jan@company.com	Send Email Not Yet Sent Send Reminder	Not Started	View	Remove

Email Notifications

Next, click the links as indicated to send the **email notifications** to the Multiraters.

Multirater Completion of the Appraisal Questionnaire

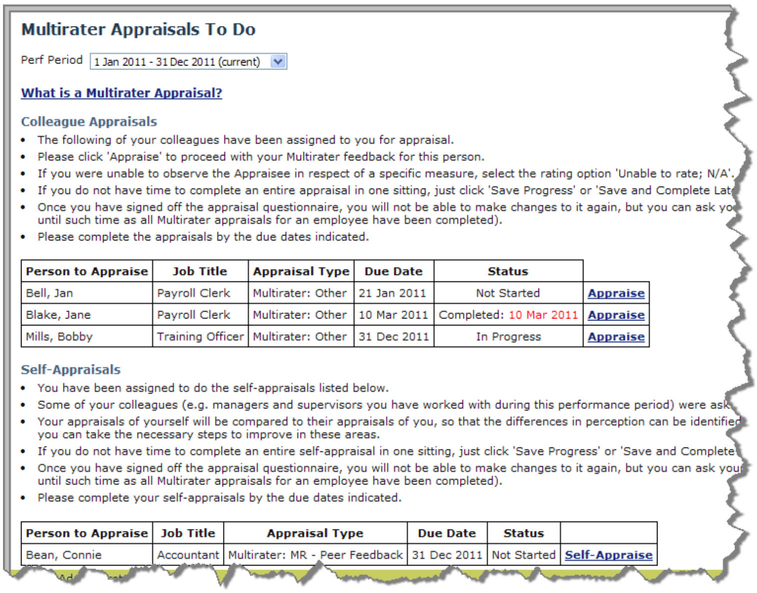
Multiraters go to their **Appraisee Role**, and select **Appraisals >> Multirater Apps TO DO** (their email notification will have detailed instructions plus a hyperlink (new from May 2012) that opens the questionnaire directly without havening to log into the system).



Multirater Appraisals TO DO

There are two types (follow the detailed instructions):

- Colleague Appraisals
- Self-Appraisals


Multirater Appraisals To Do

Perf Period 1 Jan 2011 - 31 Dec 2011 (current)

What is a Multirater Appraisal?

Colleague Appraisals

- The following of your colleagues have been assigned to you for appraisal.
- Please click 'Appraise' to proceed with your Multirater feedback for this person.
- If you were unable to observe the Appraisee in respect of a specific measure, select the rating option 'Unable to rate; N/A'.
- If you do not have time to complete an entire appraisal in one sitting, just click 'Save Progress' or 'Save and Complete Lat
- Once you have signed off the appraisal questionnaire, you will not be able to make changes to it again, but you can ask yo until such time as all Multirater appraisals for an employee have been completed).
- Please complete the appraisals by the due dates indicated.

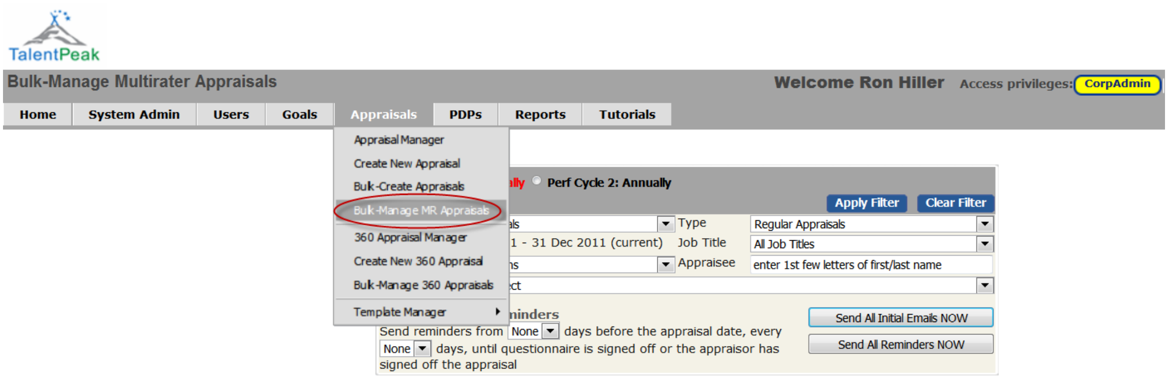
Person to Appraise	Job Title	Appraisal Type	Due Date	Status	
Bell, Jan	Payroll Clerk	Multirater: Other	21 Jan 2011	Not Started	Appraise
Blake, Jane	Payroll Clerk	Multirater: Other	10 Mar 2011	Completed: 10 Mar 2011	Appraise
Mills, Bobby	Training Officer	Multirater: Other	31 Dec 2011	In Progress	Appraise

Self-Appraisals

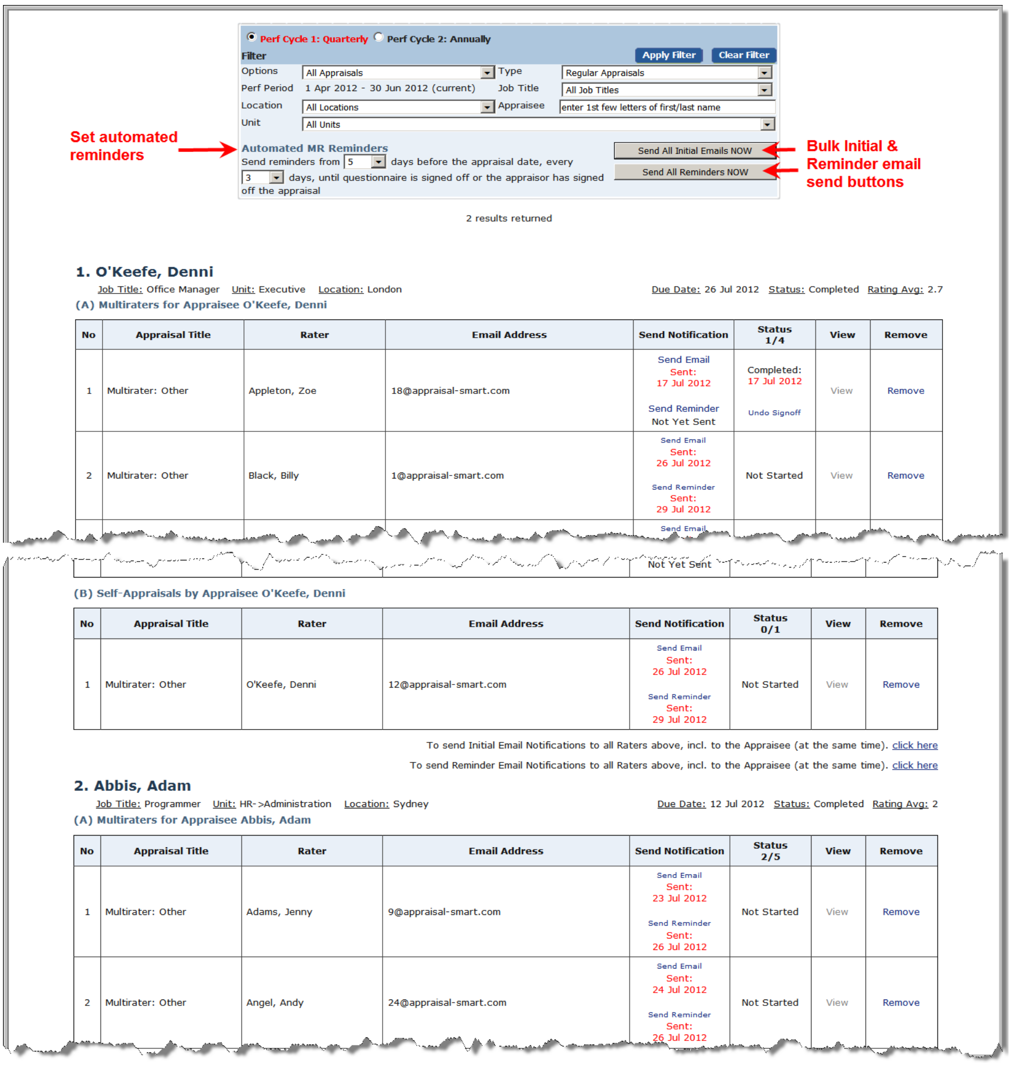
- You have been assigned to do the self-appraisals listed below.
- Some of your colleagues (e.g. managers and supervisors you have worked with during this performance period) were ask
- Your appraisals of yourself will be compared to their appraisals of you, so that the differences in perception can be identified you can take the necessary steps to improve in these areas.
- If you do not have time to complete an entire self-appraisal in one sitting, just click 'Save Progress' or 'Save and Complete
- Once you have signed off the appraisal questionnaire, you will not be able to make changes to it again, but you can ask you until such time as all Multirater appraisals for an employee have been completed).
- Please complete your self-appraisals by the due dates indicated.

Person to Appraise	Job Title	Appraisal Type	Due Date	Status	
Bean, Connie	Accountant	Multirater: MR - Peer Feedback	31 Dec 2011	Not Started	Self-Appraise

Bulk Manage Multirater Appraisals



You can manage Multirater Appraisals in bulk, follow the instructions provided:



Sample Auto Email Reminder

Automated email reminders are sent out overnight according to your settings in the filter, with a report sent to the CorpAdmin, as per the following example:

Subject: Multirater Reminder Email Notification Report

Dear Don Munro

This is a report of the Multirater reminders sent out on 13 Aug 2012:

36 Reminder email notifications were sent out successfully.
2 Reminder email notifications could not be sent due to invalid email addresses of Raters. View the Bulk-Manage MR Appraisals page to see who they are (red-shaded rows).

Multirater auto reminders will automatically stop after 30 days from an appraisal due date to prevent continuous notifications being sent out should an appraisal be unduly delayed (or never done). Set a new due date for such appraisals for the auto reminders to resume.

Logon page: https://www.talentpeak.net

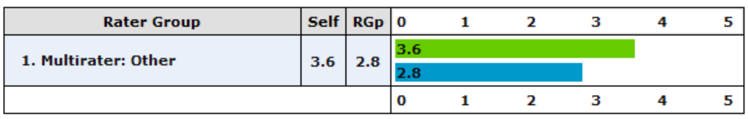
NOTE: This is a system-generated email, so please do not reply to it. Please contact your appraisal system vendor if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).

Multirater Reports

The Multirater Reports can be accessed at the bottom of the Multirater Appraisal page.

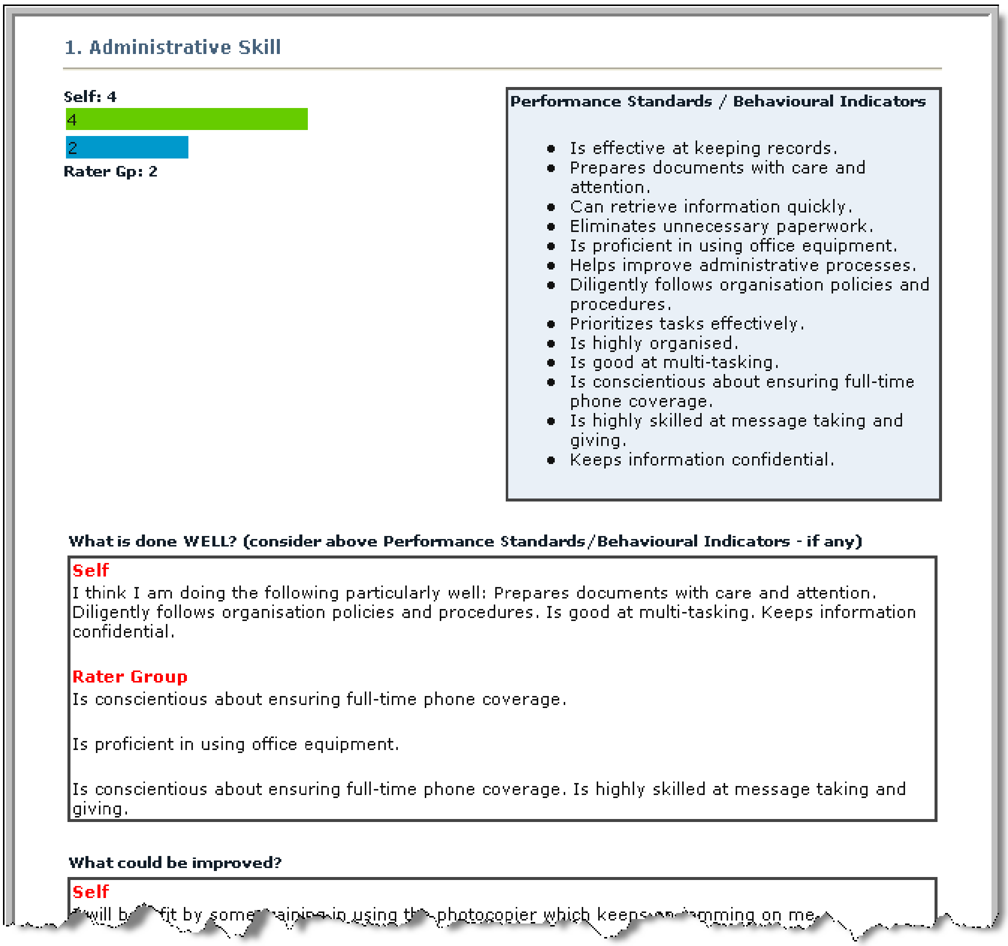
Multirater Reports

Rater Group	#Raters-Rater Gp	Avg Rating-Rater Gp	Rating-Self	Reports	
1. Multirater: Other	4	2.8	3.6	Graphical	Narrative



Report 1: Narrative Report

This report has as primary focus the provision of **narrative (qualitative) feedback** to the Appraisee



1. Administrative Skill

Self: 4

4

2

Rater Gp: 2

Performance Standards / Behavioural Indicators

- Is effective at keeping records.
- Prepares documents with care and attention.
- Can retrieve information quickly.
- Eliminates unnecessary paperwork.
- Is proficient in using office equipment.
- Helps improve administrative processes.
- Diligently follows organisation policies and procedures.
- Prioritizes tasks effectively.
- Is highly organised.
- Is good at multi-tasking.
- Is conscientious about ensuring full-time phone coverage.
- Is highly skilled at message taking and giving.
- Keeps information confidential.

What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)

Self
I think I am doing the following particularly well: Prepares documents with care and attention. Diligently follows organisation policies and procedures. Is good at multi-tasking. Keeps information confidential.

Rater Group
Is conscientious about ensuring full-time phone coverage.

Is proficient in using office equipment.

Is conscientious about ensuring full-time phone coverage. Is highly skilled at message taking and giving.

What could be improved?

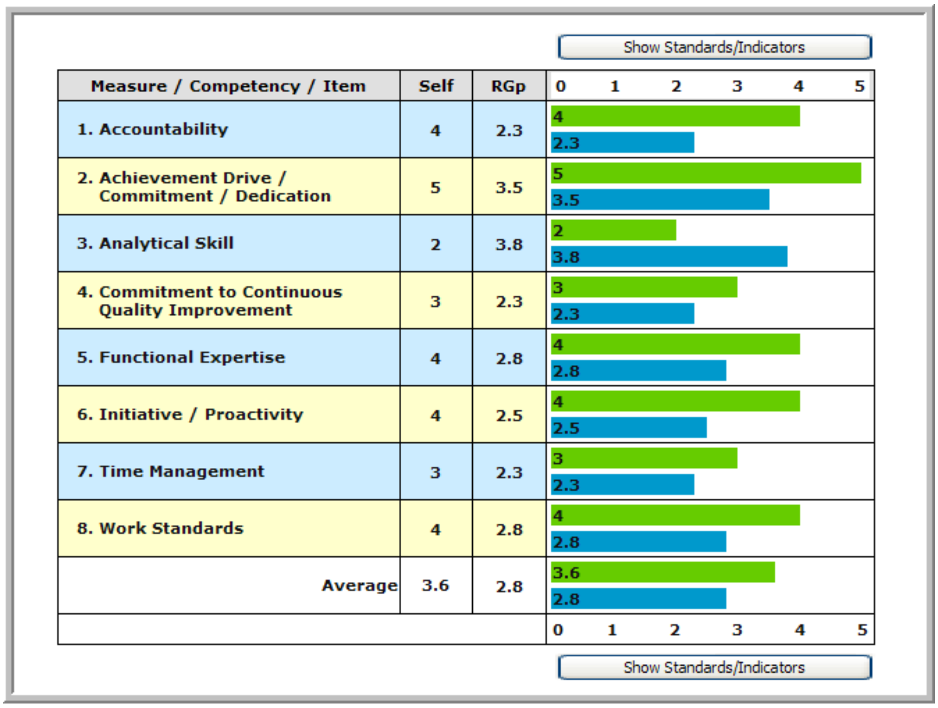
Self
I will benefit by some training in using the photocopier which keeps jamming on me.

NOTE: Quantitative ratings serve a purpose (pointing out rating gaps), but without telling Appraisees in text/narrative form more specifically what they are doing **well**, and what **should be improved**, it will have limited value; and may even cause Appraisee anxiety - not knowing what to keep on doing, and what to change.

Report 2: Graphical Reports

FOUR different reports appear on this page. Here are two examples:

Graphical Reports Sample #1

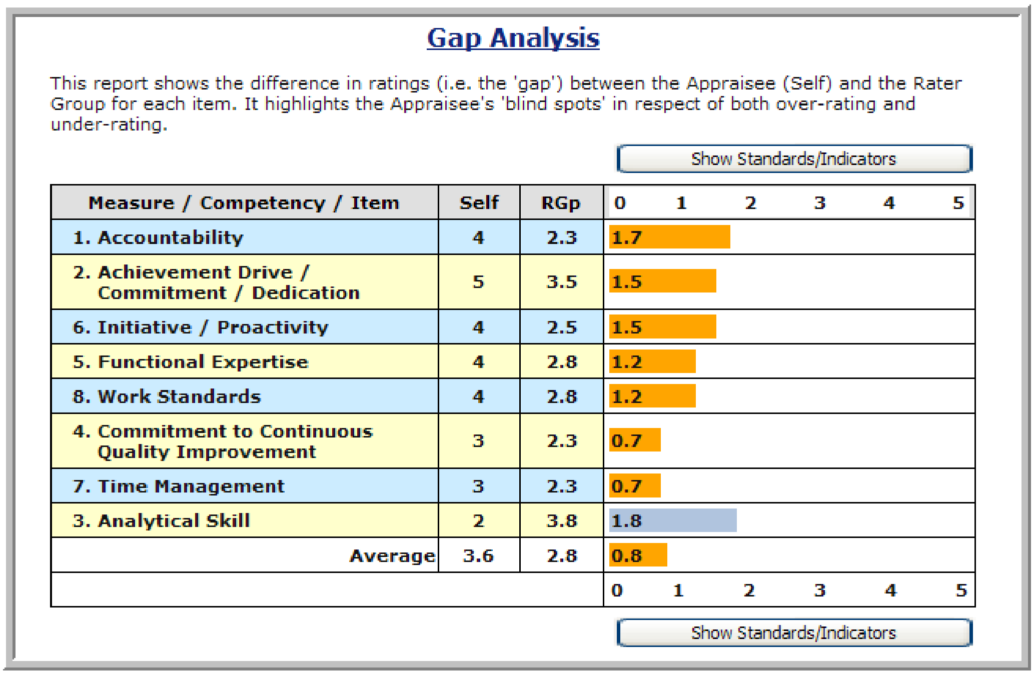


Show Standards/Indicators

Measure / Competency / Item	Self	RGp	0 1 2 3 4 5
1. Accountability	4	2.3	4 / 2.3
2. Achievement Drive / Commitment / Dedication	5	3.5	5 / 3.5
3. Analytical Skill	2	3.8	2 / 3.8
4. Commitment to Continuous Quality Improvement	3	2.3	3 / 2.3
5. Functional Expertise	4	2.8	4 / 2.8
6. Initiative / Proactivity	4	2.5	4 / 2.5
7. Time Management	3	2.3	3 / 2.3
8. Work Standards	4	2.8	4 / 2.8
Average	3.6	2.8	3.6 / 2.8
			0 1 2 3 4 5

Show Standards/Indicators

Graphical Reports Sample # 2



Gap Analysis

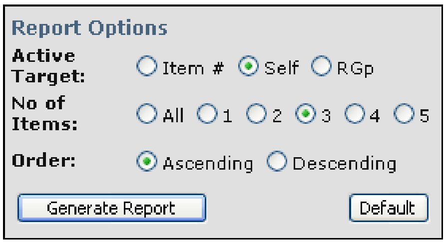
This report shows the difference in ratings (i.e. the 'gap') between the Appraisee (Self) and the Rater Group for each item. It highlights the Appraisee's 'blind spots' in respect of both over-rating and under-rating.

Show Standards/Indicators

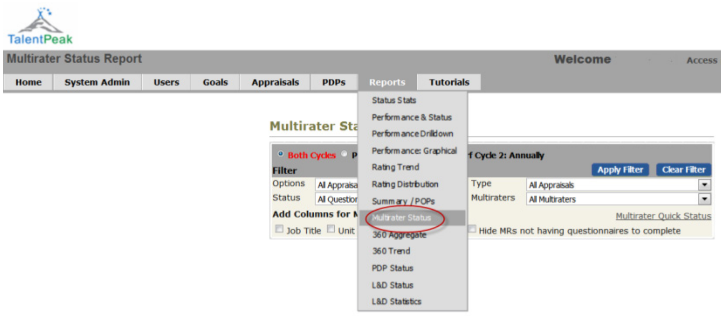
Measure / Competency / Item	Self	RGp	0 1 2 3 4 5
1. Accountability	4	2.3	1.7
2. Achievement Drive / Commitment / Dedication	5	3.5	1.5
6. Initiative / Proactivity	4	2.5	1.5
5. Functional Expertise	4	2.8	1.2
8. Work Standards	4	2.8	1.2
4. Commitment to Continuous Quality Improvement	3	2.3	0.7
7. Time Management	3	2.3	0.7
3. Analytical Skill	2	3.8	1.8
Average	3.6	2.8	0.8
			0 1 2 3 4 5

Show Standards/Indicators

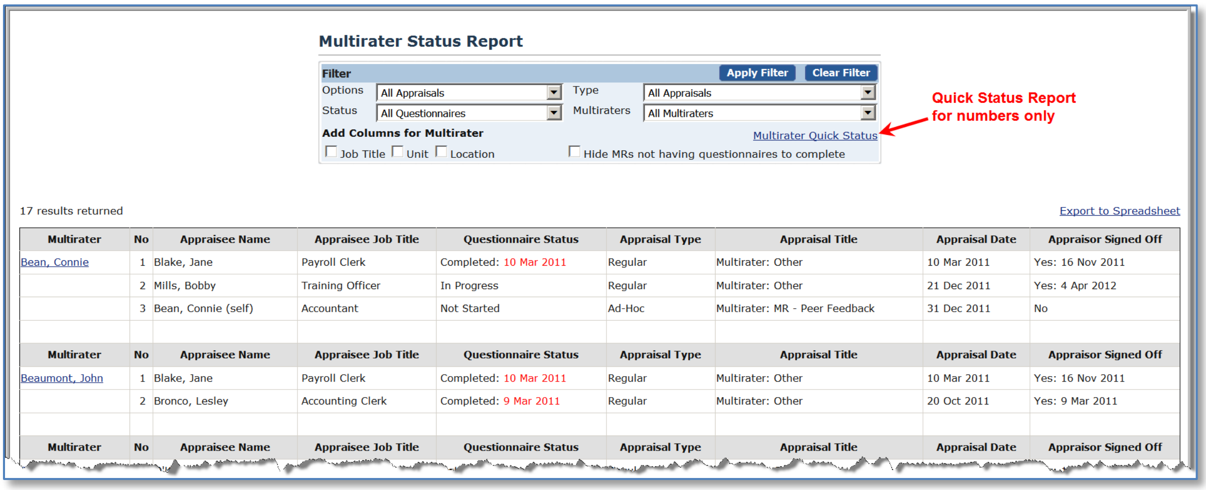
Three reports on this page have a filter to create dynamic "sub-reports" of any combination you wish. This is extremely useful in analysing Appraisee Strengths and Development Needs – and to use during feedback and coaching sessions with employees.



Multirater Overall Status Report

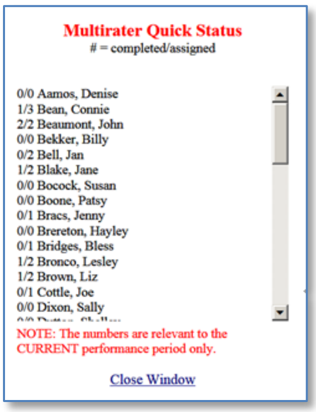


A Multirater status report, found under "Reports" where you can monitor how many colleagues (and to whom) a specific user has been requested to give feedback to, plus the status of such multirater questionnaires to be completed by them.



Multirater	No	Appraisee Name	Appraisee Job Title	Questionnaire Status	Appraisal Type	Appraisal Title	Appraisal Date	Appraisor Signed Off
Bean, Connie	1	Blake, Jane	Payroll Clerk	Completed: 10 Mar 2011	Regular	Multirater: Other	10 Mar 2011	Yes: 16 Nov 2011
	2	Mills, Bobby	Training Officer	In Progress	Regular	Multirater: Other	21 Dec 2011	Yes: 4 Apr 2012
	3	Bean, Connie (self)	Accountant	Not Started	Ad-Hoc	Multirater: MR - Peer Feedback	31 Dec 2011	No
Multirater	No	Appraisee Name	Appraisee Job Title	Questionnaire Status	Appraisal Type	Appraisal Title	Appraisal Date	Appraisor Signed Off
Beaumont, John	1	Blake, Jane	Payroll Clerk	Completed: 10 Mar 2011	Regular	Multirater: Other	10 Mar 2011	Yes: 16 Nov 2011
	2	Bronco, Lesley	Accounting Clerk	Completed: 9 Mar 2011	Regular	Multirater: Other	20 Oct 2011	Yes: 9 Mar 2011
Multirater	No	Appraisee Name	Appraisee Job Title	Questionnaire Status	Appraisal Type	Appraisal Title	Appraisal Date	Appraisor Signed Off

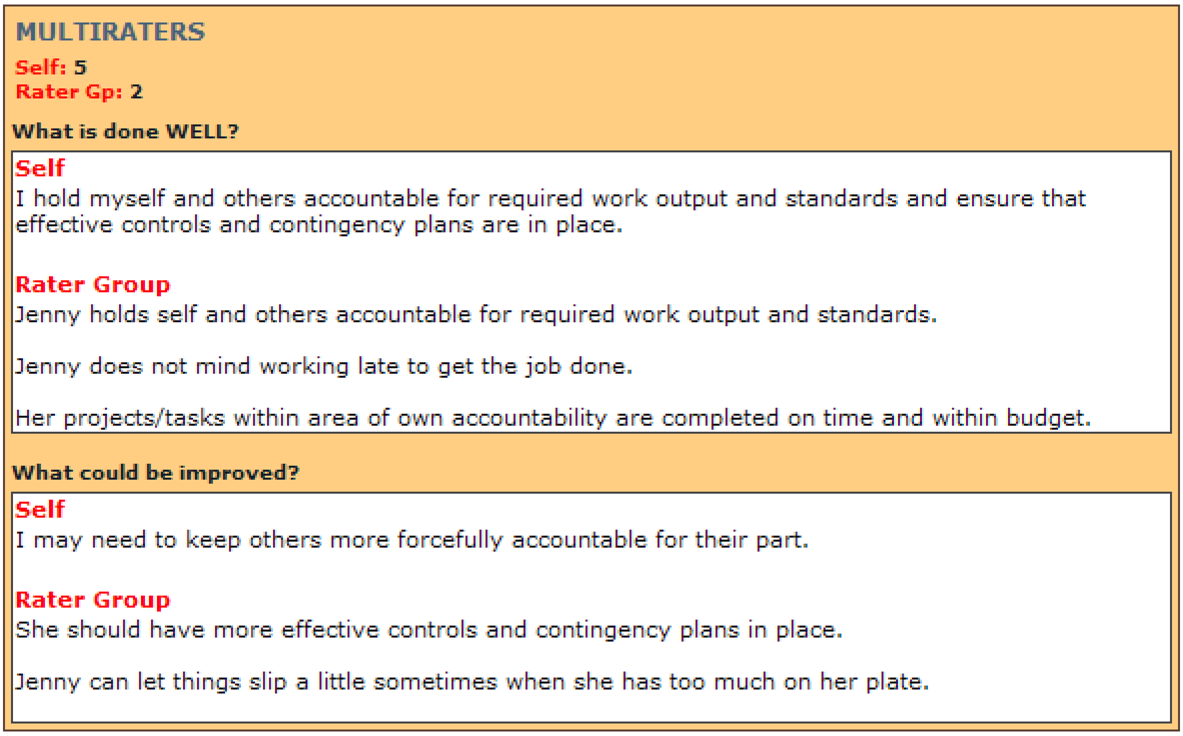
Multirater Quick Status View



How the Multirater Feedback should be used

Line managers should use the feedback from Multiraters to assist them in completing their Appraisor Prep or the Official Appraisal Form. Although the Narrative Report can be viewed on the MULTIRATERS page, the best way to view the Multirater comments and ratings is to click the "Show Multirater Feedback" link (see below) on the Official Appraisal or Prep Forms.

This will open the following section with each Performance Measure. Use the Multiraters' feedback as a resource, or even copy and paste selected text from there to the **Actual Performance Notes** or **POP** fields in the Appraisal Form.



MULTIRATERS
Self: 5
Rater Gp: 2
What is done WELL?
Self
I hold myself and others accountable for required work output and standards and ensure that effective controls and contingency plans are in place.

Rater Group
Jenny holds self and others accountable for required work output and standards.

Jenny does not mind working late to get the job done.

Her projects/tasks within area of own accountability are completed on time and within budget.

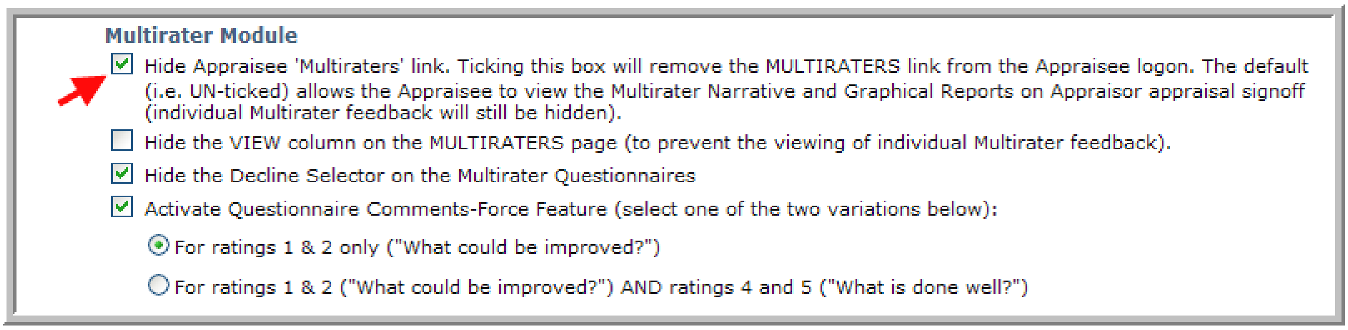
What could be improved?
Self
I may need to keep others more forcefully accountable for their part.

Rater Group
She should have more effective controls and contingency plans in place.

Jenny can let things slip a little sometimes when she has too much on her plate.

Appraisee View

Appraisees (by default) can also view the Multirater Reports from their login, once the Summary/Pop Form has been signed off, but CorpAdmins has the ability to de-activate the MULTIRATERS link on the Appraisee's side if they so wish. (*Done in System Settings):*



Multirater Module
- [x] Hide Appraisee 'Multiraters' link. Ticking this box will remove the MULTIRATERS link from the Appraisee logon. The default (i.e. UN-ticked) allows the Appraisee to view the Multirater Narrative and Graphical Reports on Appraisor appraisal signoff (individual Multirater feedback will still be hidden).
- [ ] Hide the VIEW column on the MULTIRATERS page (to prevent the viewing of individual Multirater feedback).
- [x] Hide the Decline Selector on the Multirater Questionnaires
- [x] Activate Questionnaire Comments-Force Feature (select one of the two variations below):
  - (•) For ratings 1 & 2 only ("What could be improved?")
  - ( ) For ratings 1 & 2 ("What could be improved?") AND ratings 4 and 5 ("What is done well?")

Consider the other settings (see above) as well to tailor the module to suit your preferences.

TALENTPEAK COMPASS 360™ SYSTEM

Marketing Video Link>> http://www.talent-peak.com/compass360.html

Compass360™ Comparison to Other 360 Systems

Most 360-degree feedback systems use the same set of around 25 to 100 questions for ALL Rater Groups (e.g. Manager/s, Peers, Direct Reports, Customers). The problem with that is that from each Rater Group's unique perspective (context), a certain portion/percentage of these questions will not be relevant, e.g. how well can a PEER answer questions about customer service (especially external customer service), or a CUSTOMER about teamwork?

Most systems try to overcome this problem by using very generic questions - to fit all Rater Groups - but with potentially equally generic and bland results.

The **context-targeted technology** of Compass360 enables highly targeted question sets for each individual Rater Group - covering its unique working relationship and involvement with the employee, e.g.:

- PEERS: Questions about teamwork (and related).
- CUSTOMERS: Questions about customer service (and related).
- MANAGER/S: Questions about the employee's job competence and behaviours.
- DIRECT REPORTS: Questions about the manager's management style and practices.

Compass360 allows 20+ raters (no upper limit) per 360 Appraisal. Below are examples of how these can be distributed in practice:

Educational Institutions:
- Student feedback: 5 to 50 raters (questions about classroom presentation, student relations, etc.)
- Peer feedback: 3 to 10 raters
- Principal/Dean & Department Head/s feedback: 1 to 10 raters

Other Organisations:
- Peer feedback: 3 to 10 raters
- Direct Report feedback: 3 to 10 raters
- Line Manager feedback: 1 to 5 raters
- Customer (internal or external) feedback: 3 to 20 raters

(The above are examples only, as any number of raters per Rater Group and 360 can be assigned)

The number and types of Rater Groups will depend on who you want feedback from, and can therefore be different combinations for your employees (360 feedback recipients) - leading to additional flexibility in the use of the system).

As mentioned above, question sets for each Rater Group are highly context-targeted towards that Rater Group, based on their unique working relationship and involvement with the employee.

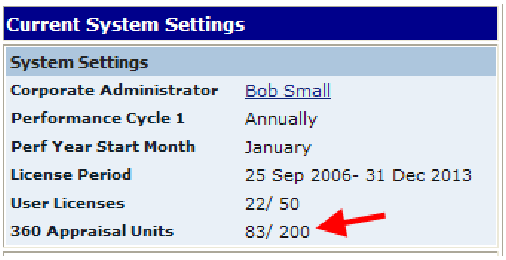
This leads to dramatically more useful and actionable feedback for the Appraisee, with resultant hugely enhanced behaviour and performance improvement.

Please note: Compass360 is unique in respect of its context-targeted technology, but it also provides the standard 360 option of one set of questions/competencies for all Rater Groups.

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

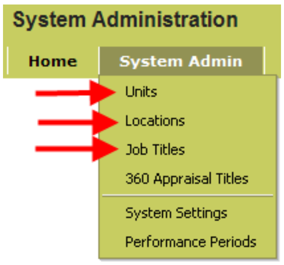
Compass360™ Appraisal Units

Compass360 Appraisal Units are priced and purchased per unit, appearing on the **CorpAdmin Home Page** as indicated in the screenshot below (**used/total**):



Current System Settings	
System Settings	
Corporate Administrator	Bob Small
Performance Cycle 1	Annually
Perf Year Start Month	January
License Period	25 Sep 2006- 31 Dec 2013
User Licenses	22/ 50
360 Appraisal Units	83/ 200

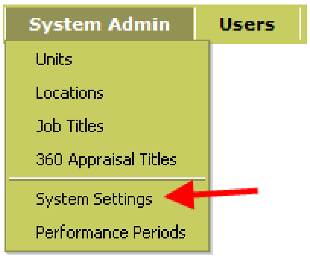
A **360 Appraisal Unit** equates to one 360 appraisal (one "target" 360 appraisee with any number of raters).



Units, Locations Job Titles

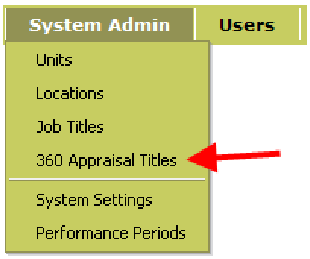
Follow the simple instructions on the respective system pages as indicated below, to add your organisation chart (Units), Locations, and Job Titles:

(Only need this step if the Compass360 is a standalone system. Otherwise this step would already have been set up for your organization when the core performance system was implemented.)



System Admin Settings for Compass360

Make your required system feature selections (contact TalentPeak™ customer support for assistance to ensure that the appropriate selections are made to reflect your unique needs):



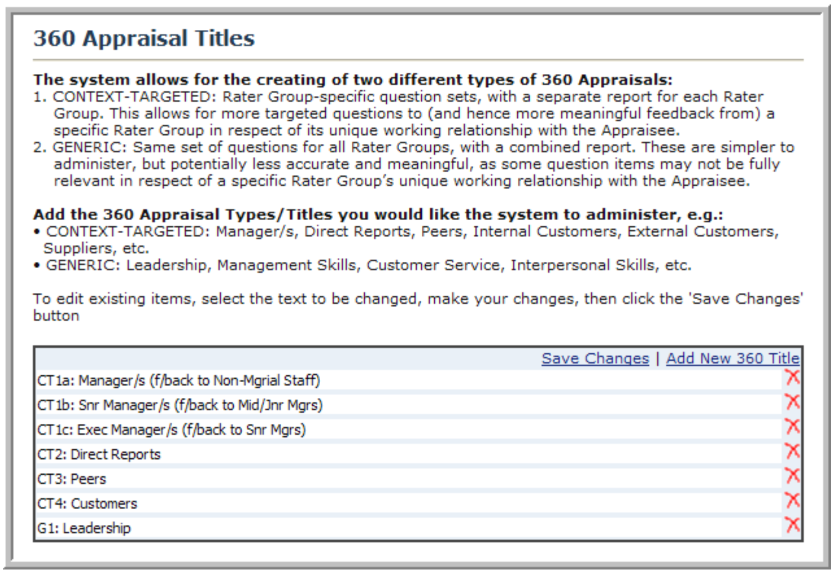
Adding 360 Appraisal Titles

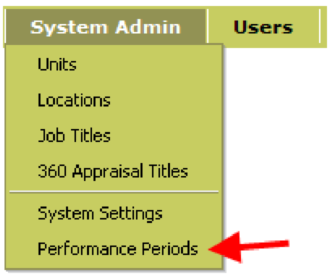
Select 360 Appraisal Titles from the "System Admin" dropdown

Add the 360 Appraisal Titles (Questionnaire names) you want to use (see examples in screenshot below):

- "CT" = Context-Targeted
- "G" = Generic

There is no requirement to add these abbreviations though, as 360 questionnaire titles such as **Managers**, **Investment Team**, **Leadership**, etc. will be perfectly fine – whatever titles you deem appropriate to differentiate between your various questionnaires and the target groups they aim at.





Performance Periods

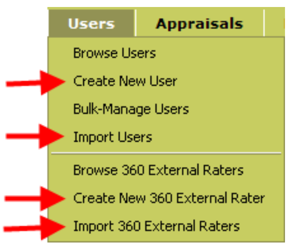
Follow the detailed instructions on this page to set up your performance periods (ask TalentPeak™ customer support to assist if necessary).

(Only need this step if the Compass360 is a standalone system. Otherwise this step would already have been set up for your organization when the core performance system was implemented.)

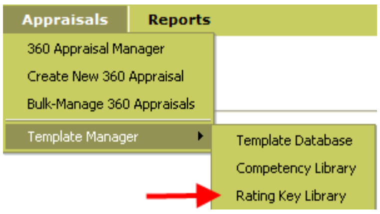
Internal & External Users/Raters

Upload your internal employees (users) in bulk via the "Import Users" page (ask TalentPeak™ support to send you the relevant **Bulk User Import Excel Template**), or by adding them one at a time through the "Create New User" page.

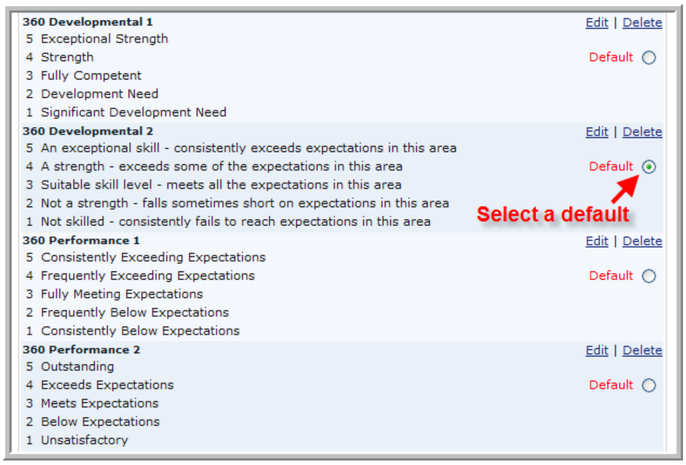
External raters (e.g. external customers) are uploaded via the "Create New 360 External Rater" page, or by uploading them in bulk by using the **Bulk External Rater Import Excel Template**, also obtainable from TalentPeak™ customer support.



Rating Key Library

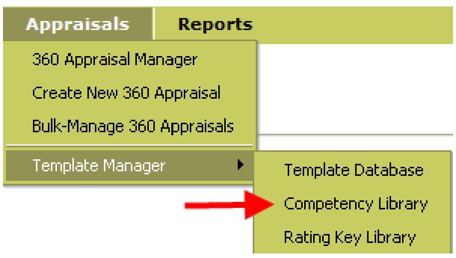


Add your 360 Rating Key/s, and select one as default. You can use different ones for different questionnaires, but do not mix them within one questionnaire.

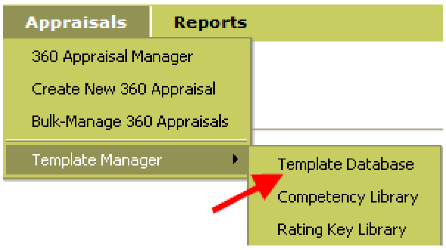


Competency Library

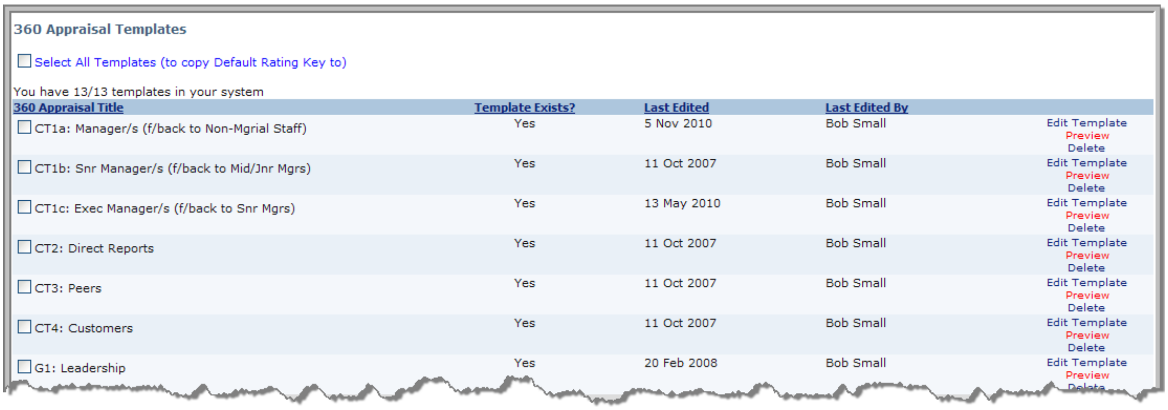
Consider uploading your full set of Competencies to the Competency Library (used to easily download selected ones when creating 360 Appraisal Templates/Questionnaires). Request TalentPeak™ customer support to provide you with the full set of competencies that comes at no extra charge with the system (as an Excel Importer and/or WORD doc).



360 Appraisal Templates (Questionnaires)



Add your 360 Appraisal Templates (i.e. questionnaire competency sets) on this page (the 360 questionnaires are created via the templates).


360 Appraisal Templates

Select All Templates (to copy Default Rating Key to)

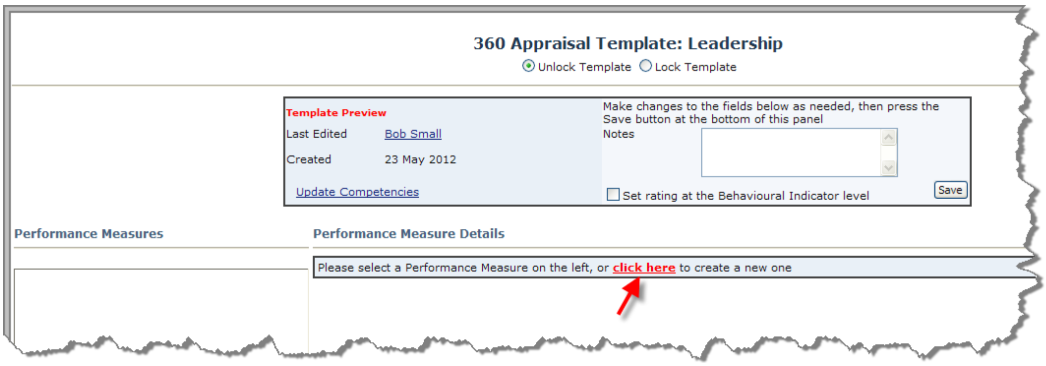
You have 13/13 templates in your system

360 Appraisal Title	Template Exists?	Last Edited	Last Edited By	
CT1a: Manager/s (f/back to Non-Mgrial Staff)	Yes	5 Nov 2010	Bob Small	Edit Template Preview Delete
CT1b: Snr Manager/s (f/back to Mid/Jnr Mgrs)	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
CT1c: Exec Manager/s (f/back to Snr Mgrs)	Yes	13 May 2010	Bob Small	Edit Template Preview Delete
CT2: Direct Reports	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
CT3: Peers	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
CT4: Customers	Yes	11 Oct 2007	Bob Small	Edit Template Preview Delete
G1: Leadership	Yes	20 Feb 2008	Bob Small	Edit Template Preview

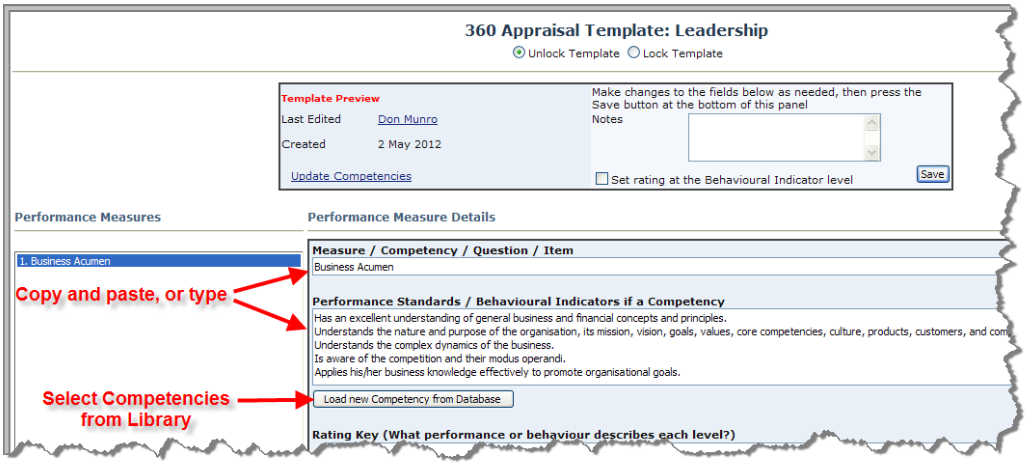
To add Competencies to a template/questionnaire, click the Create Template link:

Customers	Yes	29 Sep 2006	Don Munro	Edit Template Preview Delete
Leadership	No	1 Jan 0001		Create Template

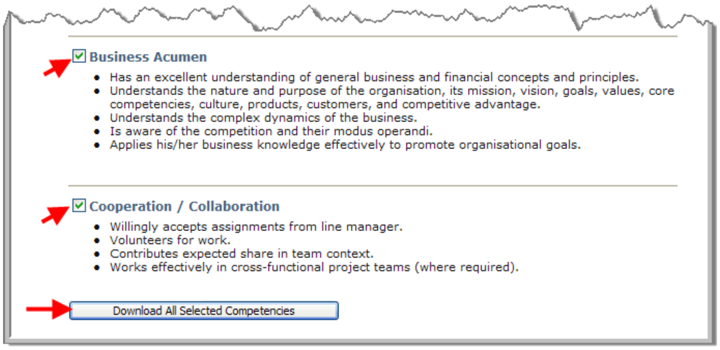
Click the **click here** link to add the Competencies:



Competencies can be copied from e.g. a Word doc, and pasted into the fields as indicated below, and/or selected from the Competency Library:



Select Competencies from the Library, and download them into the template:



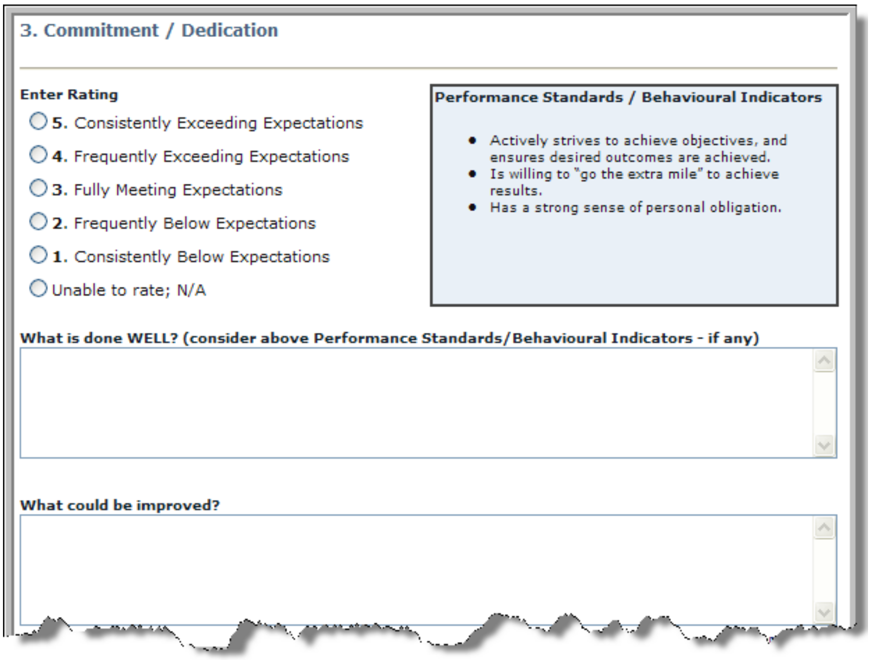
Two 360 Questionnaire Types

You can set the questionnaires for rating at the **Competency Level** OR the **(Behavioural) Indicator Level**:

Questionnaire Type	Pros	Cons
(a) Competency Level (More suitable with 11 or more Competencies)	• Fewer items to rate, which may speed up the questionnaire completion. • Simpler 360 reports, as analysis is done at the Competency level only.	• All Behavioural Indicators per Competency have to be read through by raters, and a combined rating per Competency decided. Some raters may find this difficult to do.
(b) Indicator Level (More suitable with 10 or less Competencies)	• Some raters may find the rating of each separate Behavioural Indicator easier to do. • 360 reports include analysis at the Indicator level (deeper drilldown for those wanting it).	• More items to rate, which will take more time. • Raters may get exhausted and rush through which can lead to a poorer quality end result.

The general rule is to rather have fewer (e.g. 6 to 12) Competencies per questionnaire, than too many that can lead to rater exhaustion and poor quality results, especially if a rater has many questionnaires to complete.

(a) Competency-Level Questionnaire Sample:


3. Commitment / Dedication

Enter Rating

- ◯ **5.** Consistently Exceeding Expectations
- ◯ **4.** Frequently Exceeding Expectations
- ◯ **3.** Fully Meeting Expectations
- ◯ **2.** Frequently Below Expectations
- ◯ **1.** Consistently Below Expectations
- ◯ Unable to rate; N/A

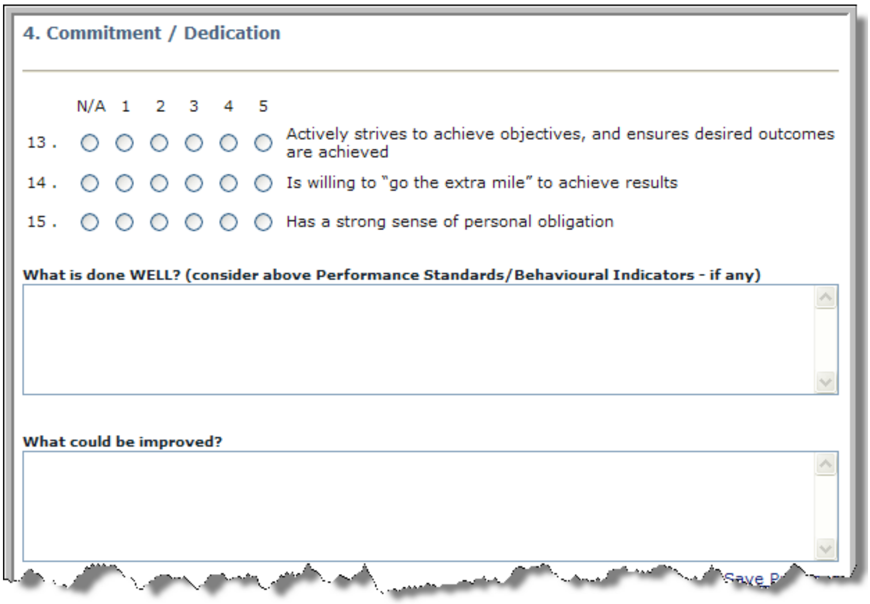
Performance Standards / Behavioural Indicators

- Actively strives to achieve objectives, and ensures desired outcomes are achieved.
- Is willing to "go the extra mile" to achieve results.
- Has a strong sense of personal obligation.

What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)

What could be improved?

(b) Indicator-Level Questionnaire Sample:

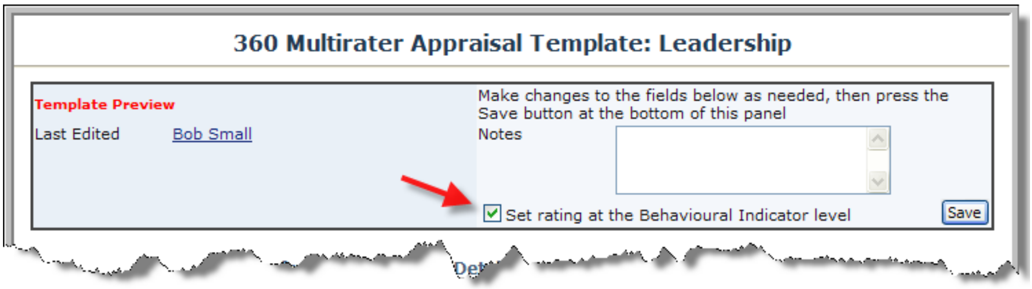

4. Commitment / Dedication

	N/A	1	2	3	4	5	
13 .	◯	◯	◯	◯	◯	◯	Actively strives to achieve objectives, and ensures desired outcomes are achieved
14 .	◯	◯	◯	◯	◯	◯	Is willing to "go the extra mile" to achieve results
15 .	◯	◯	◯	◯	◯	◯	Has a strong sense of personal obligation

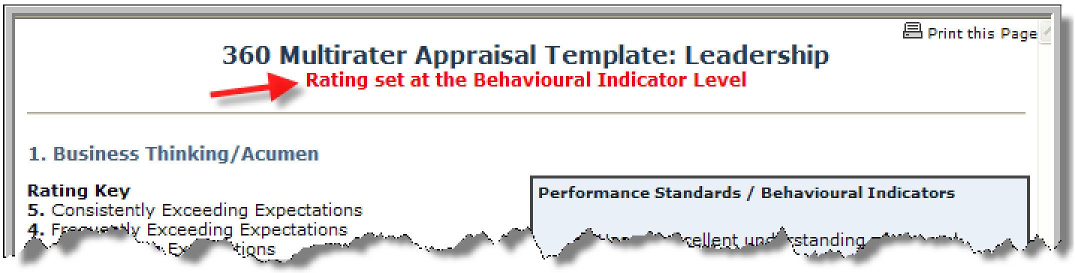
What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)

What could be improved?

To **set questionnaires for rating at the Behavioural indicator level**, tick the box indicated below:



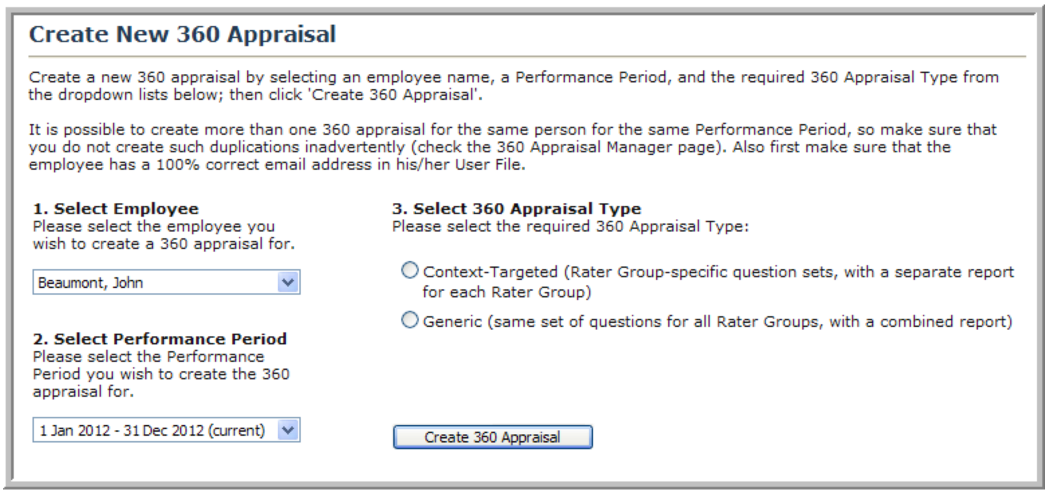
The **Template Preview** will display as follows:



When this box is NOT ticked, the questionnaire will be automatically set for rating at the Competency level.

Creating a 360 Appraisal for an Employee

Select **Create New 360 Appraisal**, and follow the detailed instructions provided:



NOTE: It is possible to create an unlimited number of 360 Appraisals, add raters, and have them complete their 360 Questionnaires, but the 360 reports will not be viewable until the 360 Appraisal has been locked down on the **Indiv Reports** page. The moment the "Lock Down 360 Appraisal and Generate Reports" button is clicked (and you select "Yes" on the pop-up warning) your organisation gets debited with one 360 Appraisal Unit (if you have any units still available in credit).

360 Raters Page

By clicking the **"**Create 360 Appraisal" button (see screenshot above), the following page gets created:

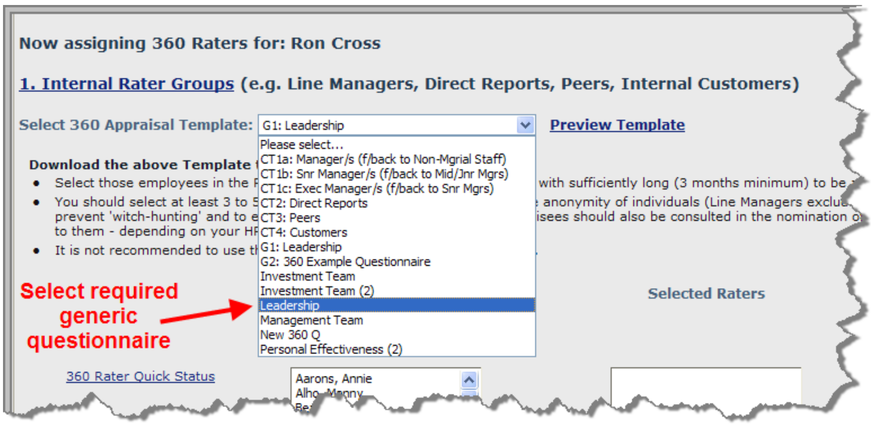
Change the **Due Date** to the date by when all 360 Appraisal Questionnaires should be completed by the raters.

Assigning Raters (internal and/or External)

Click the **"Open Multirater Selector"** button (see screenshot above), to open the following new page section:

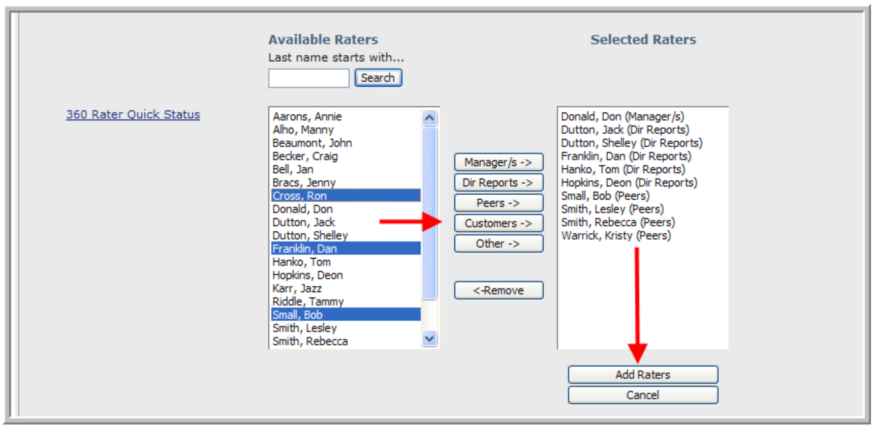
(a) Generic 360 Selector View:

Select the required 360 questionnaire in the dropdown list:

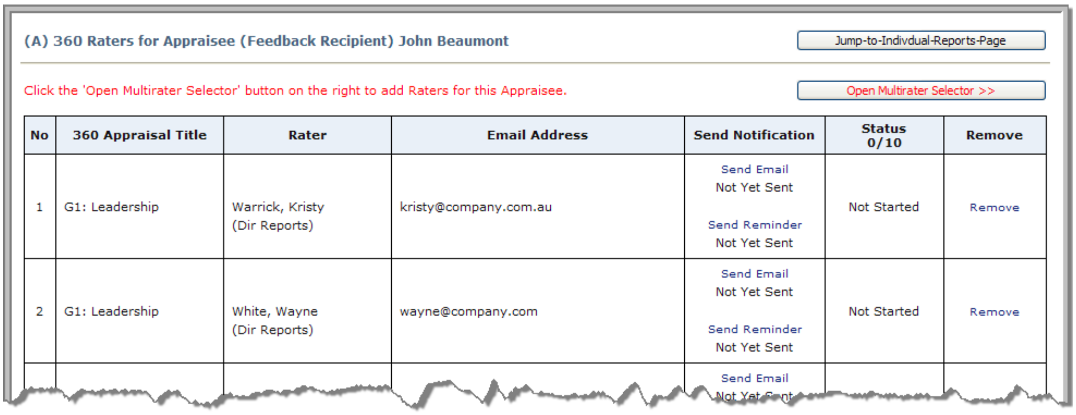


Add the raters (see screenshot below):

- All **internal users/employees** show in the "Available Raters" field of **Rater Selector 1** – to select from to add as raters
- The available **external raters** show in **Rater Selector 2**.
- Add the raters by selecting the relevant names on the left (hold down CTRL key for multiple selections), and then clicking the relevant Rater Group button in the middle, to move them over to the section on the right. Then click the **Add Raters** button.

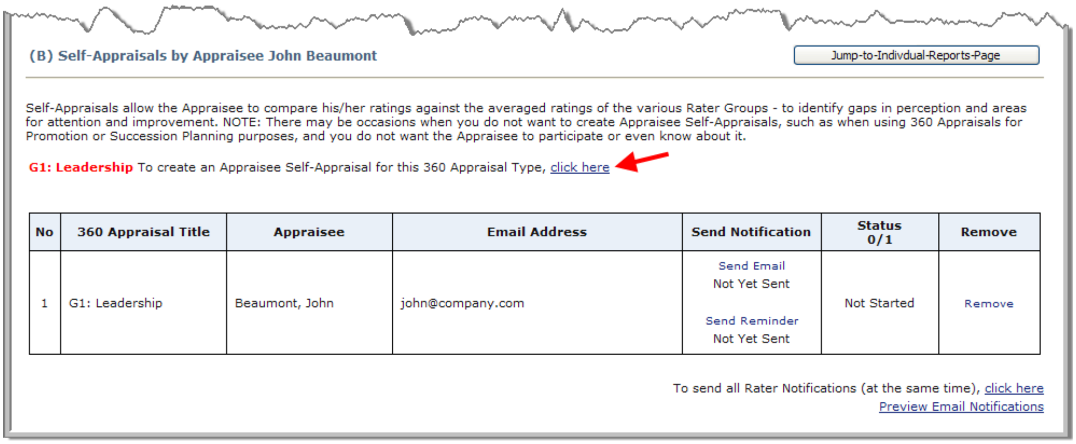


The raters (once added) will show in a table below the selector as follows (you can now close the selector):



No	360 Appraisal Title	Rater	Email Address	Send Notification	Status 0/10	Remove
1	G1: Leadership	Warrick, Kristy (Dir Reports)	kristy@company.com.au	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove
2	G1: Leadership	White, Wayne (Dir Reports)	wayne@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove
				Send Email Not Yet Sent		

Appraisee Self-Appraisals show in a separate table on the same page. Click the link indicated below to create the 360 self-appraisal:

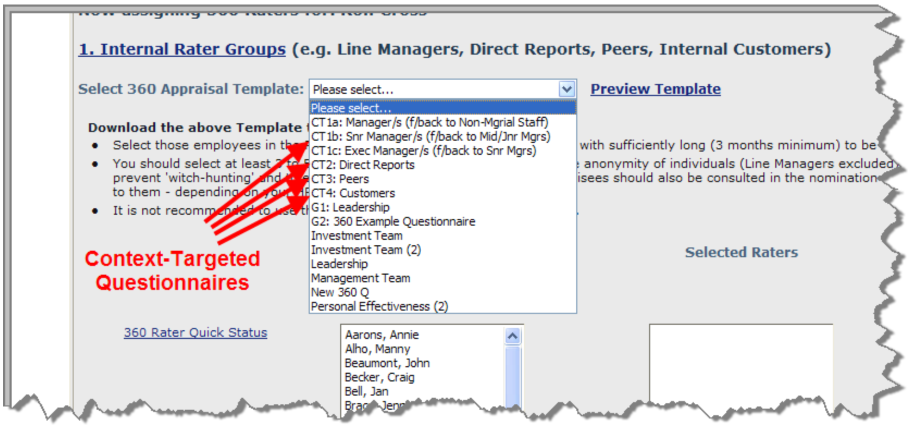


No	360 Appraisal Title	Appraisee	Email Address	Send Notification	Status 0/1	Remove
1	G1: Leadership	Beaumont, John	john@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove

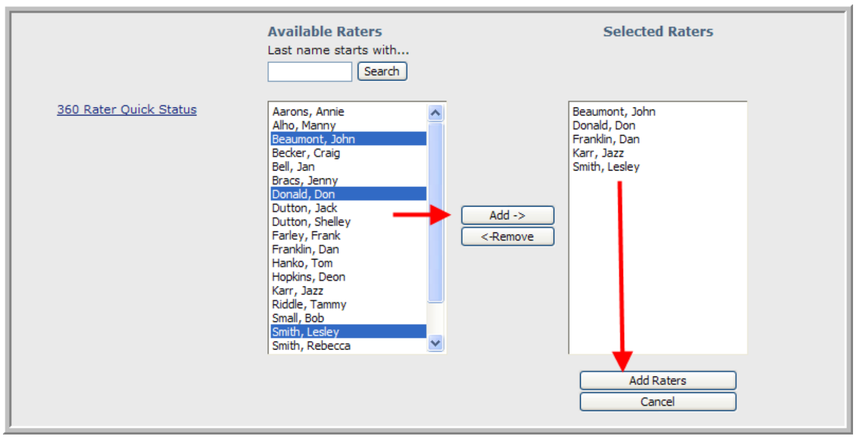
NOTE: You may sometimes choose not to have Appraisees complete self-appraisals, such as when they are among other candidates for promotion/succession, and you do not want them to know that a 360 Appraisal is being done on them.

(b) Context-Targeted 360 Selector View:

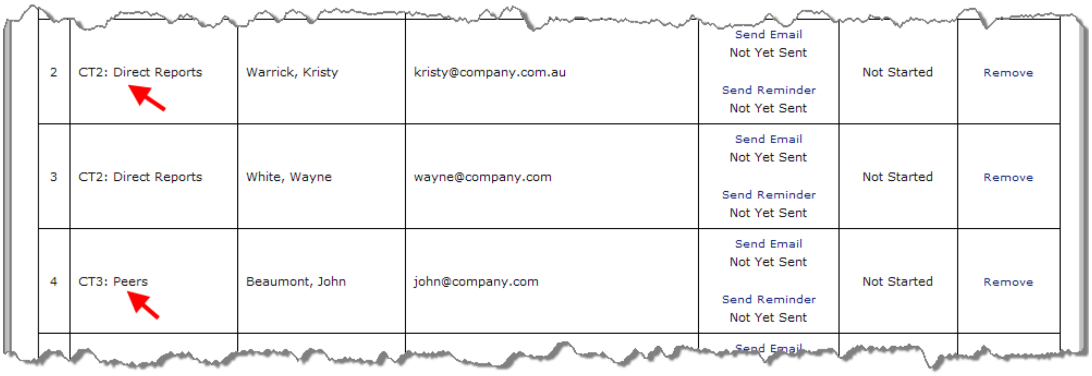
In the case of Context-Targeted 360s, you need to select a separate questionnaire for each separate Rater Group you want to involve:



The adding of raters work differently to Generic 360s in that the raters are selected based on the Context-Targeted Questionnaire selected, e.g. if the **CT: Peers** questionnaire is selected, then selected the peers to be added. Next select a new questionnaire, e.g. **CT: Direct Reports**, and then add all the direct reports of the appraisee to this questionnaire, etc. You can have as many different questionnaires for one 360 as you like.

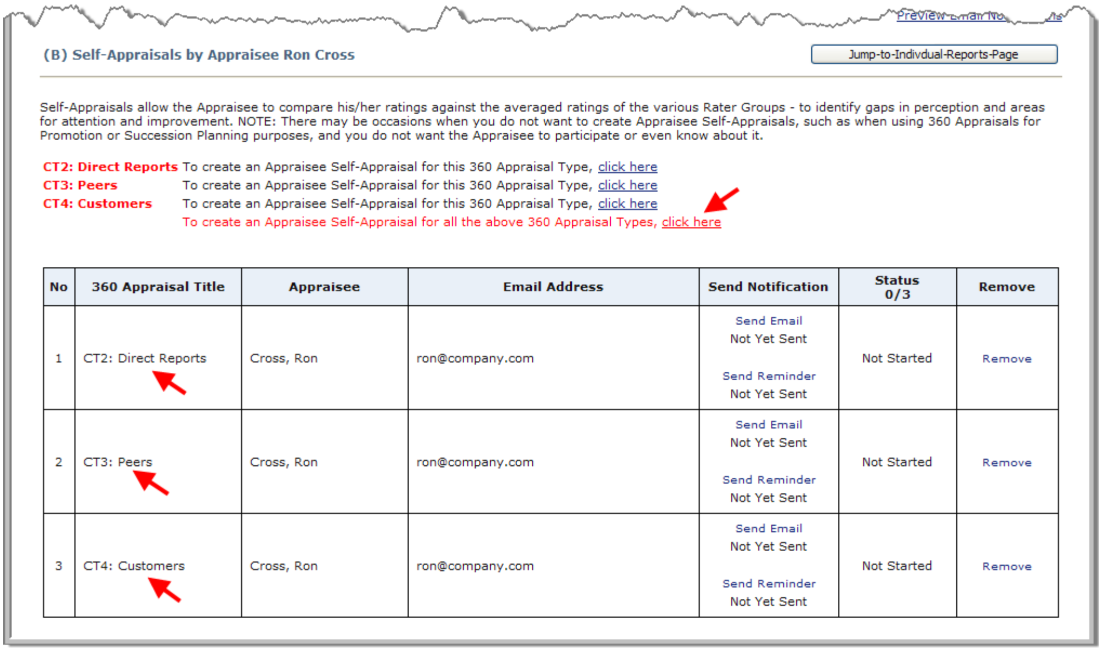


The different questionnaires used can be seen in the table:



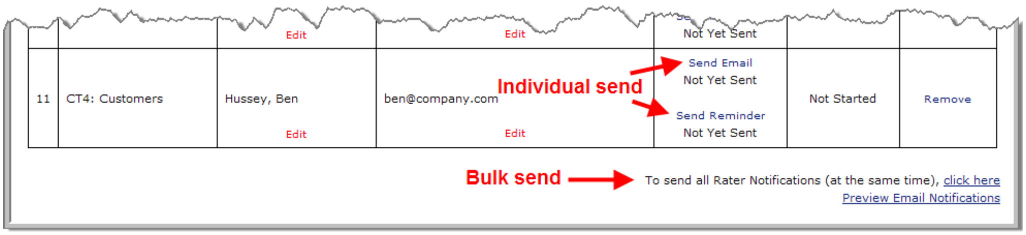
2	CT2: Direct Reports	Warrick, Kristy	kristy@company.com.au	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove
3	CT2: Direct Reports	White, Wayne	wayne@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove
4	CT3: Peers	Beaumont, John	john@company.com	Send Email Not Yet Sent Send Reminder Not Yet Sent	Not Started	Remove

The appraisee need to complete all the questionnaires:

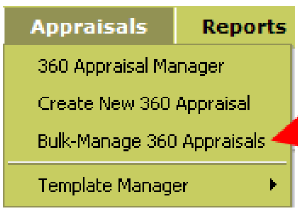


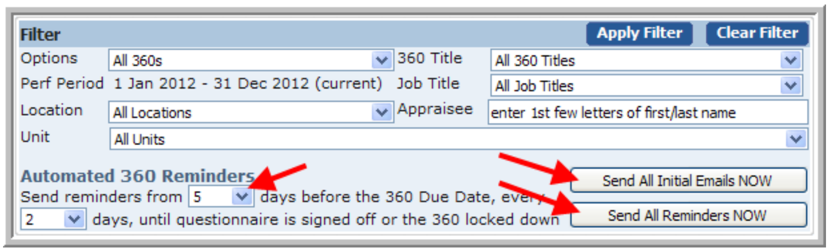
Email Notifications

Next, click the links as indicated to send the initial email notifications (or reminders) – individually, or in bulk at the same time.



Via the **Bulk-Manage 360 Appraisals** page, the initial email notifications and reminders can also be sent for ALL 360s at the same time, and also set as automated reminders as per your frequency settings. (Automated email reminders stop once a questionnaire has been completed. The CorpAdmin is also sent an email report as to how many automated reminders were sent out by the system overnight.)





Both internal and external raters receive an email notification containing a hyperlink which, if clicked, takes them directly to their 360 Questionnaire (without the need to log into the system).

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

Example Email notification:

From: Performance Appraisal System [mailto:dontreply@appraisalsystem.info]
Sent: Thursday, August 23, 2012 10:23 AM
To: mike@talent-peak.com
Subject: 360 Feedback: Rita Hayward

Dear Mike Mathews

You are invited to provide anonymous feedback about Rita Hayward in respect of his/her working relationship with you.

Please click on the hyperlink below to access the 360 Appraisal Questionnaire for completion at your earliest convenience (but not later than the due date indicated):

https://www.talentpeak.net/email.aspx?Guid=2f64f458-a64b-43ff-bc24-dbf33d0b6083
(If you are unable to open the web page by clicking on this link, you can copy and paste the URL into your web browser)

If you do not have time to complete the entire questionnaire in one sitting, just click 'Save Progress' or ' Save and Complete Later', log out, and return later to complete it in full.

Please be assured that your feedback will remain anonymous, and will be collected securely via the vendor's website.

We appreciate your cooperation in completing this 360 feedback questionnaire!

NOTE: This is a system-generated email, so please do not reply to it> Please contact the person who asked you to participate if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).

Internal Rater Completion of Assigned 360 Questionnaires

Although **Internal raters** also have a hyperlink in the email they receive (to open the questionnaire directly) they can also access their assigned questionnaires by going to their **Appraisee** Role (this may be the only role they have)…

…and selecting **Appraisals >> 360 Appraisals TO DO.**

There are two categories (follow the detailed instructions):
- Colleague Appraisals
- Self-Appraisals

Colleague Appraisals
- The following of your colleagues have been assigned to you for 360-degree feedback.
- Please click 'Appraise' to proceed with the 360 feedback appraisal for this person.
- If you were unable to observe this person in respect of a specific measure, select the rating option 'Unable to rate; N/A'.
- If you do not have time to complete an entire questionnaire in one sitting, just click 'Save Progress' or 'Save and Complete Later', log out, and return later to complete it in full.
- Once you have signed off an appraisal questionnaire, you will not be able to make changes to it afterwards, but you can ask your System Administrator to undo your sign off if you wish to do so.
- Please complete the appraisals by the due dates indicated.

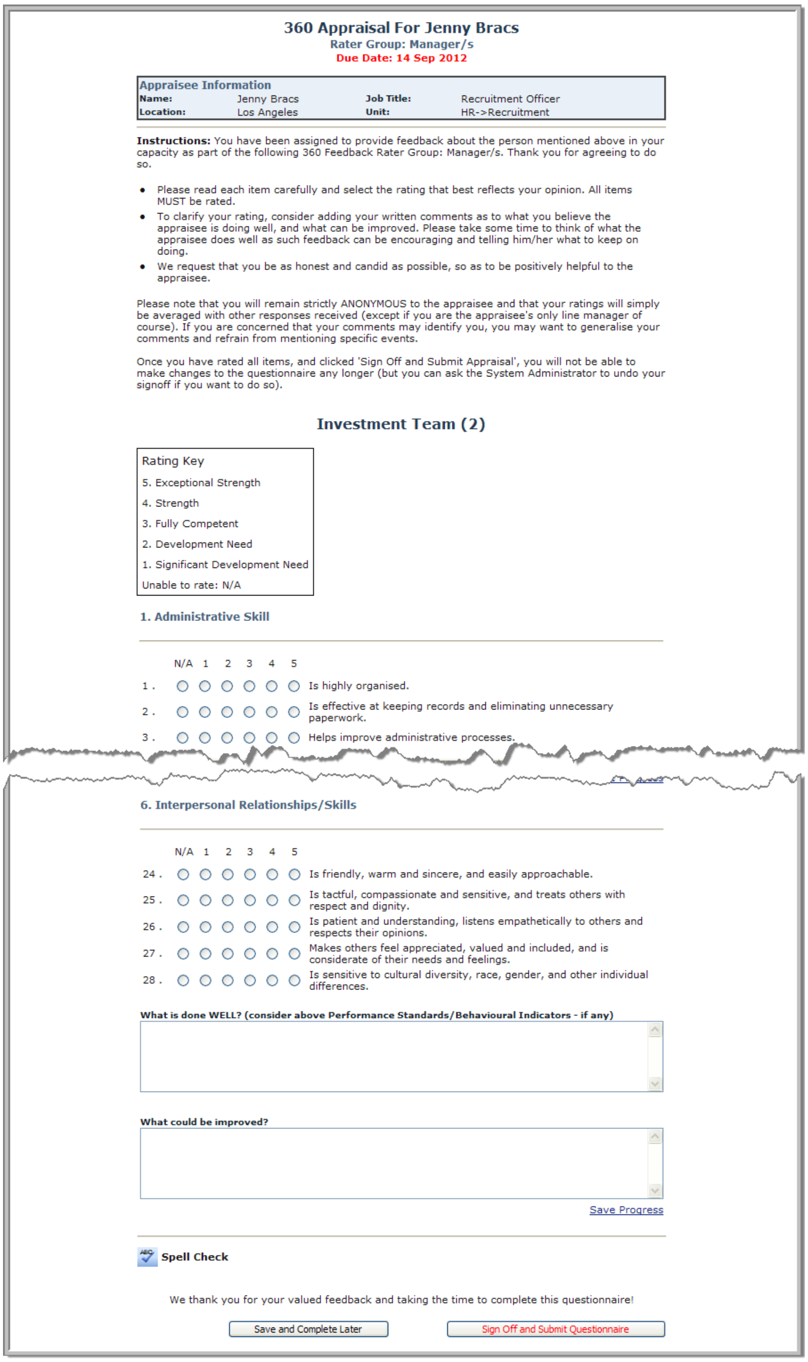
Person to Appraise	Job Title	360 Title	Due Date	Status	
Beaumont, John	Recruitment Officer	G1: Leadership	18 May 2012	Not Started	Appraise
Small, Bob	HR Manager	Investment Team	20 Jun 2012	Completed: 3 May 2012	Appraise
Hanko, Tom	CEO	G1: Leadership	21 Aug 2012	In Progress	Appraise

Self-Appraisals
- You have been assigned to do the 360 self-appraisal/s listed below.
- Some of your colleagues and/or customers were asked to complete the same 360 questionnaire/s in respect of how they perceive your working relationship with them.
- Your self-appraisal/s will be compared with their appraisals of you, so that the differences in perception can be identified with a view to increased awareness of how you are perceived by them, building on your strengths, and identifying areas in which you may want to improve.
- If you do not have time to complete an entire self-appraisal in one sitting, just click 'Save Progress' or 'Save and Complete Later', log out, and return later to complete it in full.
- Once you have signed off an appraisal questionnaire, you will not be able to make changes to it afterwards, but you can ask your System Administrator to undo your sign off if you wish to do so.
- Please complete your self-appraisal/s by the due date/s indicated.

Person to Appraise	Job Title	360 Title	Due Date	Status	
Warrick, Kristy	Consultant	Personal Effectiveness (2)	21 Sep 2012	Not Started	Self-Appraise

360 Appraisal Questionnaires

Following is an example of a 360 Questionnaire, with rating set at the behaviour indicator level:



360 Appraisal For Jenny Bracs
Rater Group: Manager/s
Due Date: 14 Sep 2012

Appraisee Information			
Name:	Jenny Bracs	**Job Title:**	Recruitment Officer
Location:	Los Angeles	**Unit:**	HR->Recruitment

Instructions: You have been assigned to provide feedback about the person mentioned above in your capacity as part of the following 360 Feedback Rater Group: Manager/s. Thank you for agreeing to do so.

- Please read each item carefully and select the rating that best reflects your opinion. All items MUST be rated.
- To clarify your rating, consider adding your written comments as to what you believe the appraisee is doing well, and what can be improved. Please take some time to think of what the appraisee does well as such feedback can be encouraging and telling him/her what to keep on doing.
- We request that you be as honest and candid as possible, so as to be positively helpful to the appraisee.

Please note that you will remain strictly ANONYMOUS to the appraisee and that your ratings will simply be averaged with other responses received (except if you are the appraisee's only line manager of course). If you are concerned that your comments may identify you, you may want to generalise your comments and refrain from mentioning specific events.

Once you have rated all items, and clicked 'Sign Off and Submit Appraisal', you will not be able to make changes to the questionnaire any longer (but you can ask the System Administrator to undo your signoff if you want to do so).

Investment Team (2)

Rating Key
5. Exceptional Strength
4. Strength
3. Fully Competent
2. Development Need
1. Significant Development Need
Unable to rate: N/A

1. Administrative Skill

	N/A	1	2	3	4	5	
1 .	○	○	○	○	○	○	Is highly organised.
2 .	○	○	○	○	○	○	Is effective at keeping records and eliminating unnecessary paperwork.
3 .	○	○	○	○	○	○	Helps improve administrative processes.

6. Interpersonal Relationships/Skills

	N/A	1	2	3	4	5	
24 .	○	○	○	○	○	○	Is friendly, warm and sincere, and easily approachable.
25 .	○	○	○	○	○	○	Is tactful, compassionate and sensitive, and treats others with respect and dignity.
26 .	○	○	○	○	○	○	Is patient and understanding, listens empathetically to others and respects their opinions.
27 .	○	○	○	○	○	○	Makes others feel appreciated, valued and included, and is considerate of their needs and feelings.
28 .	○	○	○	○	○	○	Is sensitive to cultural diversity, race, gender, and other individual differences.

What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)

What could be improved?

Save Progress

Spell Check

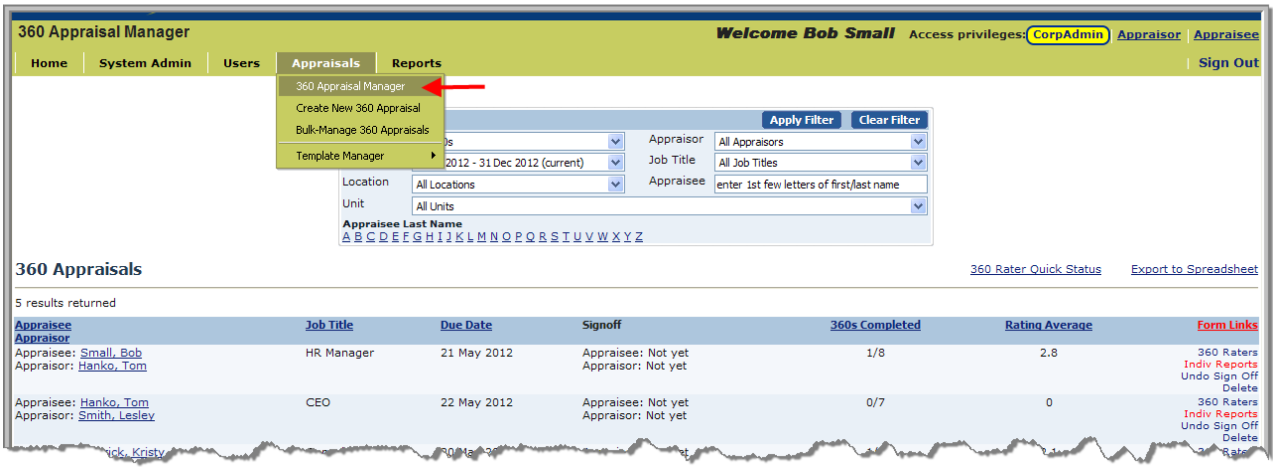
We thank you for your valued feedback and taking the time to complete this questionnaire!

Save and Complete Later | Sign Off and Submit Questionnaire

360 Appraisal Manager Page

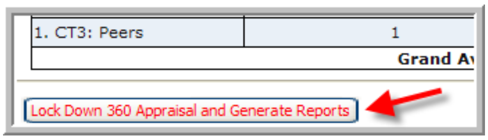
In your **CorpAdmin Role**, select **Appraisals >> 360 Appraisal Manager.**

On this page you can view all the 360 appraisals you have created, the Rater Groups' **Rating Average** (Appraisee self-appraisal/s excluded), as well as the number of **360 Questionnaires per 360 completed** (self-appraisal/s included).



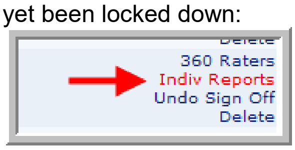
Individual Reports Page

Once you are satisfied that all the raters have completed their questionnaires, you need to lock down the 360 Appraisal by clicking the "Lock Down 360 Appraisal and Generate Reports" button, bottom left of the **Individual Reports** page. Your organisation will then be debited with one 360 Appraisal Unit, if you have any units still available in credit (balance viewable on the system home page) failing which the system will warn you accordingly.

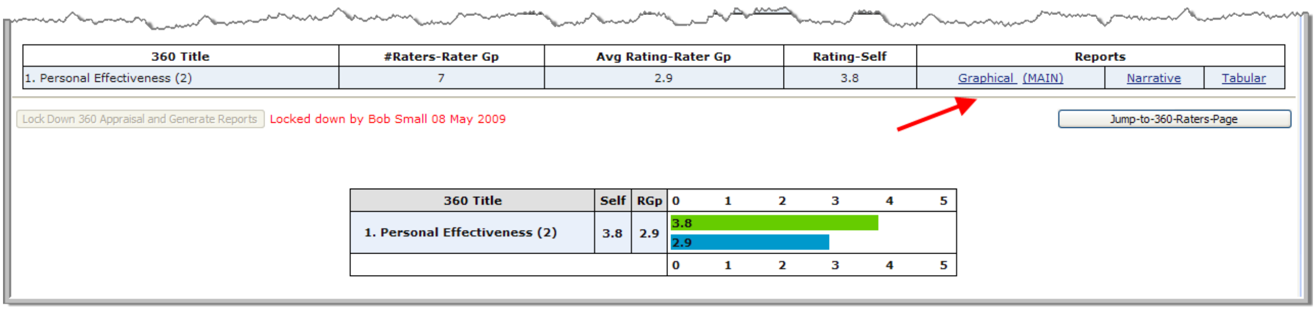


NOTE: You can lock down a 360 without having to wait for delinquent raters to complete their questionnaires. Remove them from the rater table if you like, but leaving them in the table (even with partially completed questionnaires) will not cause any problems or calculation issues, as they will be fully excluded from the results.

NOTE that a RED **Indiv Reports** link on the **360 Appraisal Manager** page is a visual clue that this 360 Appraisal has not yet been locked down:



Locking down a 360 generates FOUR reports (Graphical, Graphical MAIN, Narrative, Tabular), accessible through the links as indicated below:



Please note that such a lockdown cannot be reversed -- as you will be alerted about (via a system pop-up) when clicking the lockdown button.

Once a 360 Appraisal has been locked down, no further changes can be made to it, i.e. you cannot add any further raters, and any uncompleted questionnaires can no longer be completed.

The "Lock Down 360 Appraisal and Generate Reports" button can be clicked by System Administrators as well as Appraisors, if the latter are allowed to do so as per your System Settings and your HR policy in this regard. The name of the person who did the locking down, as well as the date, will show next to the lock-down button (see screenshot above).

Individual Report Views

Report 1: Tabular

Competency-level Tabular Reports show the ratings per Competency only:

No	Measure / Competency / Item	Manager/s	Peers	Dir Reports	Averages	Appraisee
1	Strategic Thinking / Visioning	4	2	2.5	2.8	4
2	Business Thinking/Acumen	3	2.5	3	2.8	3
3	Team Building and Motivation	4	3.5	2	3.2	5
4	Coaching / Mentoring	4	2.5	3	3.2	2
5	Communication (Oral and Written)	5	3.5	2.5	3.7	4
6	Conflict Management	3	2.5	2.5	2.7	4
7	Creativity / Innovation	4	4	3	3.7	4
8	Decisiv[illegible]ness	3	3.5	3	3.2	5

Indicator-level Tabular Reports show the ratings per Behavioural Indicator as well (see red text below):

No	Measure / Competency / Item	Manager/s	Peers	Dir Reports	Averages	Appraisee
1	Commitment / Dedication	3.7	4.1	4.8	4.2	5
	1. Actively strives to achieve objectives, and ensures desired outcomes are achieved.	3	4	5	4	5
	2. Is willing to "go the extra mile" to achieve results.	4	4	4.7	4.2	5
	3. Has a strong sense of personal obligation.	4	4.3	4.7	4.3	5
	Communication (Oral and Written)	2	2.1	1.9	2	4
	1. Expresses views in a fluent, clear, [illegible] manner, with enthusiasm [illegible]dence.	[illegible]	2.3	[illegible]	[illegible]	[illegible]

Report 2: Narrative

This report has as primary focus the provision of **narrative (qualitative) feedback** to Appraisees.

4. Flexibility / Adaptability

Self: 4

4

2.3

Rater Gp: 2.3

Performance Standards / Behavioural Indicators

- Is open to new ways of working, ideas and processes.
- Adapts quickly and effectively to new environments, people, and responsibilities.
- Readily adapts to stressful situations and factors outside of his/her control.

What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)

Self

I adapt quickly to new situations and responsibilities

Rater Group

Handles stressful situations well

He readily adapts to factors outside of his control.

What could be improved?

Self

Comments by different raters

Rater Group

Deon is frequently dismissive of ideas offered by others - thinking he has all the answers.

Ideas from others not always appreciated

Deon thinks others' ideas are not worthy of consideration, which can be very demotivating.

Can be temperamental at times

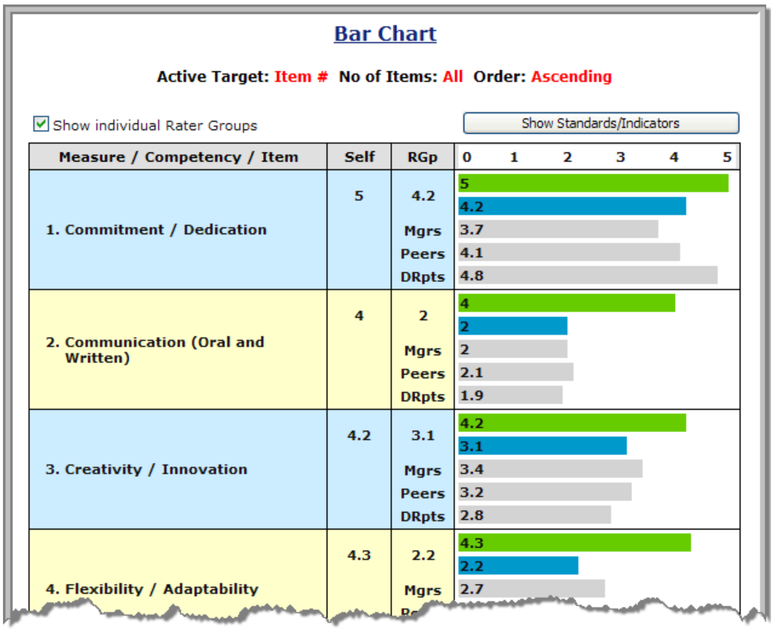
Can have a bit of a confrontational style in team meetings when he gets some opposition to his ideas.

NOTE: Quantitative ratings serve a certain purpose (i.e. pointing out rating gaps), but without telling Appraisees in text/narrative form (as above) more specifically what they are doing **well**, and what **should be improved**, ratings (and graphs) alone will have limited value; and may even cause Appraisee anxiety -- not knowing what to keep on doing, or what to change.

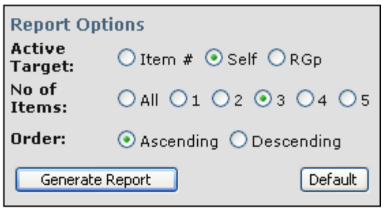
Report 3: Graphical

This report has two Bar Charts

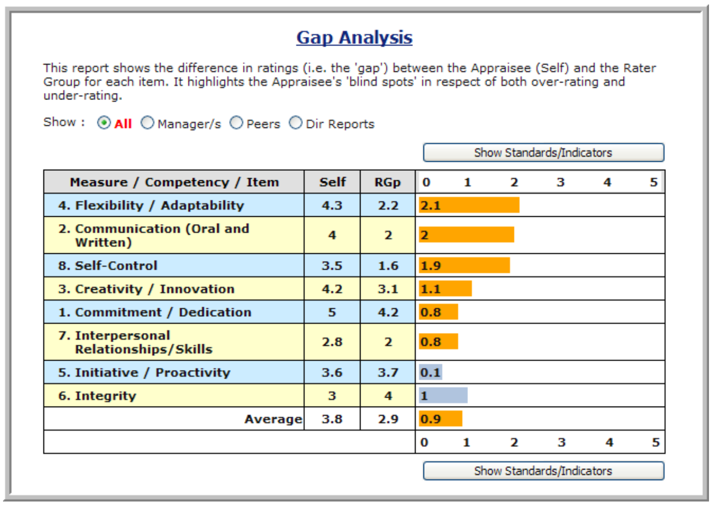
Bar Chart 1 example:



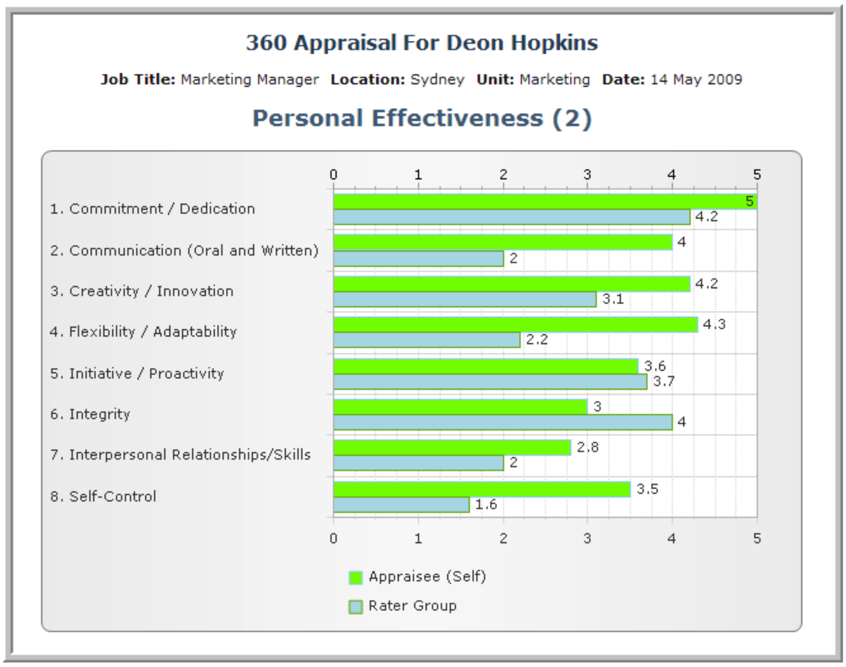
This bar chart has a filter (see below) to create dynamic “sub-reports” of any combination you wish (Active Target, No of Items, Order). This is extremely useful in analysing Appraisee Strengths and Development Needs – and to use during feedback/coaching sessions with employees.



Bar Chart 2 (Gap Analysis) example:



Report 4: Graphical MAIN



360 Appraisal Signoff

The purpose of this signoff is to enable Appraisees to view their 360 reports online as well (if that is company policy/practice), which will not be accessible by them from their system login until this signoff link is clicked. System Administrators can do this as well as the direct line managers of Appraisees (if so enabled as per your System Settings).

The Appraisee signs off last (this is not obligatory), also done on the **Indiv Reports** page, which can be opened by them only once the signoff as per the screenshot above had been done (which itself is not obligatory).

END OF CORPADMIN USER GUIDE
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