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Buildsmart HR Modules

**Performance &
Succession Overview**

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1. Appraisals Introduction

The Appraisals function within Buildsmart HR allows users to capture and maintain information related to appraisals conducted for an employee.

The facility is located in Buildsmart HR > Performance & Succession > Appraisals.

2. Appraisal Screens and Functionality

The Appraisals facility has been divided into eight screens to facilitate the following functions:

- Appraisal Details;
- KPA Rating;
- Behaviour Rating;
- Other Rating;
- Outcomes;
- Rewards;
- Promotability; and
- Summary

These are further explained as follows:

2.1. Appraisal Details

The “Details” screen allows for the capture and maintenance of the following information about each appraisal:

- Appraisal Type (performance assessment, job assessment, general assessment etc);
- Appraisal Review Type (formal or informal);
- Appraisal Date;
- Information about the Appraiser;
- Review Period;
- Reason for Appraisal;
- Appraisal Completed (Yes/No); and
- Printed & Signed-off By.

Details	KPA Rating	Behaviour Rating
Other Rating	Outcomes	Rewards
Promotability	Summary	

Performance Appraisal

[Use Appraisal Template](#)

Appraisal Type

Appraisal Name

Appraisal Review Type

Appraisal Date dd month yyyy [Calendar](#)

Appraiser Internal External

Payroll

Employee / Name

Review Period From dd month yyyy [Calendar](#)

Review Period To dd month yyyy [Calendar](#)

Reason For Appraisal

KPA, Behavioural & Other Criteria Summary			
	Actual	Expected	Difference
Number of KPA's	0.0		
Rating Achieved	0.0	0.0	0.0
Score Achieved	0.0	0.0	0.0
Number of Behavioural Attributes	0.0		
Rating Achieved	0.0	0.0	0.0
Score Achieved	0.0	0.0	0.0
Number of Other Criteria	0.0		
Rating Achieved	0.0	0.0	0.0
Score Achieved	0.0	0.0	0.0

[Help](#)

Appraisal Summary

Appraisal Type	Appraisal Name	Appraisal Date	Actual Score	Completed
Performance Asse...	Annual	02/02/2009	50	No

Sign-Off Details

Appraisal Completed

Printed and Signed-Off By Employee Appraiser Manager

The Details screen also allows the user to quickly view information related to any Key Performance Areas (KPA) and / or behavioural Attributes that have been defined for previously captured appraisals.

2.2. KPA Rating

The “KPA Rating” screen allows users to setup the Key Performance Areas (KPA for each appraisal to be used to appraise the employee. The following information can be captured and maintained:

- Key Performance Area;
- Key Performance Indicator – the evidence that must be provided to show that a KPA has been achieved;
- Measurable Output - describes how the KPI is to be measured;
- Importance Level;

And for each KPA the...

- Weighting (out of 100);
- Actual Rating;
- Expected Rating; and
- Comments regarding the rating

The system will automatically calculate a score based on the defined weight and selected rating of each KPA. The weightings, ratings and scores are tallied up to present an overall score for the employee.

Appraisals must first be defined in the Details screen before KPAs and be defined and rated. Appraisals are selected using the “Select Appraisal” section.

Pick Lists:

Pick Lists are pre-determined lists of information that are made available for use to users in the system. Key Performance Areas, Key Performance Indicators (KPI) and Measurable Output are selected using these pick lists. The reason for this is because most KPAs, KPIs and Measurable Outputs are regularly used throughout an organisation for multiple jobs e.g. the KPA “Communication” may be used for both the “Receptionist” job title and the “HR Manager” job title. By using pick lists the risk of inconsistent spelling is minimised and data integrity is maximised. Also, because these descriptions are predefined the time spent creating appraisals will be minimised.

Theses pick lists can be added to, deleted from and edited using the Pick List Maintenance facility in system Administration & Utilities.

Key Performance Area Setup

Key Performance Area

Key Performance Indicator

Measurable Output

Importance Level

Weighting <input type="text"/> (Out of 100)	Actual Rating (1 - 7)	<input type="text"/>	Actual Score
	Expected Rating (1 - 7)	<input type="text"/>	Expected Score

Comments

Key Performance Area Rating Summary

Key Performance Area	Weight	Actual		Expected	
		Rating	Score	Rating	Score
Total Score	0	0	0	0	0

Please note that Buildsmart HR will be using a predefined rating scale which can be viewed by clicking the “Help” button located on the screen. This “Help” provides you with guidance on rating measurements and the interpretation thereof. For more information please refer to section [3. Interpretation of the Rating Scale](#)

2.2.1. Multi-Raters

Multi-Rater Feedback can also be captured for each KPA. This can be done on an individual basis (eg: Line Manager) or as an aggregate (eg: Suppliers). The following information can be captured and maintained:

- Internal / External Rater;
- Rater Type ();
- Individual / Aggregate Rater;
- Anonymous;
- Importance Level;
- Weighting; and
- Expected and Actual Rating

Multi Rater Feedback Yes No

Multiple Rater Details

Key Performance Area: Communication

Key Performance Indicator: Foster open communication between supervisors

Measurable Output: Conduct weekly department head & bi-monthly co

Internal / External: Internal External

Rater Type:

Individual / Aggregate: Individual Aggregate

Rater Name:

Anonymous

Importance Level:

Weighting <input type="text"/> (Out of 100)	Actual Rating (1 - 7) <input type="text"/>	Actual Score
	Expected Rating (1 - 7) <input type="text"/>	Expected Score

Comments:

Add Update Remove Remove All

Multi-Raters Summary

View... All Raters Internal Only External Only

Category	Type	Individual /Aggregate	Name	Weight	Actual Rating	Score
Internal	Subordin...	Individual	Veroncia Ja...	25	6	150
Internal	Peer	Individual	Ian Downie	20	5	100
Internal	Line man...	Individual	James Norries	25	5	125

Comparison

2.2.2. Import Setup (from Buildsmart HR Advanced)

KPA's that have been setup in Buildsmart HR Advanced can be imported to use in Buildsmart HR Basic for an employee appraisal. These are KPA's that are setup for job descriptions defined in the Job Description module in Buildsmart HR Advanced.

Import HRM Key Performance Area's

Import Key Performance Area Setup

Selection Options

Employee's Current Job Title

Select Position / Job Title

Select(ed) Position / Job

Position Number & Description 0000001 - Director of Human Resources

Job Number & Title 0000001 - Director of Human Resources

Key Performance Area	Include
Manage Staff	<input type="checkbox"/>
Communication	<input checked="" type="checkbox"/>
Strategy formulation and implementation	<input type="checkbox"/>

Cancel Import

2.3. Behaviour Rating

The “Behaviour Rating” screen allows users to setup any Behavioural Attributes to be used to appraise the employee’s behaviour such as leadership, teamwork ability etc. The following information can be captured and maintained:

- Behavioural Attribute;
- Importance Level;

And for each behavioural attribute the...

- Weighting (out of 100)
- Actual Rating
- Expected Rating;
- Comments regarding the rating

Behavioural Rating Setup

Behavioural Attribute

Importance Level

Weighting <input style="width: 30px;" type="text"/> (Out of 100)	Actual Rating (1 - 7)	Actual Score
	Expected Rating (1 - 7)	Expected Score

Comments

Behavioural Rating Summary

Behavioural Attribute	Weight	Actual		Expected	
	Rating	Rating	Score	Rating	Score

Total Score

0	0	0	0	0
---	---	---	---	---

Multi Rater Feedback

 Yes
 No

The system will automatically calculate a score based on the defined weight and rating selected for each behavioural attribute. The weightings, ratings and scores are tallied up to present an overall score for the employee.

Multi-Rater Feedback can also be captured for each Behavioural Attribute. (For more information on Multi-Raters please refer to section 2.2.1 of this overview).

Behavioural attributes may be imported from Buildsmart HR Advanced using the "Import Setup" facility. (For more information on importing setups please refer to section 2.2.2 of this overview).

2.4. Other Rating

This screen allows you to add criteria for rating the employee other than the KPA's and Behavioural criteria. The following information can be captured and maintained:

- Other Criteria;
- Key Performance Indicator;
- Measurable Output; and
- Importance Level

And for each criteria the...

- Weighting (out of 100)
- Actual Rating
- Expected Rating;
- Comments regarding the rating

Other Criteria Setup

Other Criteria

Key Performance Indicator

Measurable Output

Importance Level

Weighting <input type="text"/> (Out of 100)	Actual Rating (1 - 7)	Actual Score
	Expected Rating (1 - 7)	Expected Score

Comments

Other Criteria Rating Summary

Other Criteria	Weight	Actual		Expected	
		Rating	Score	Rating	Score
Confidence : Exudes Self Co	50	7	350	7	350

Total Score	50	7	350	7	350
--------------------	----	---	-----	---	-----

Multi Rater Feedback Yes No

The system will automatically calculate a score based on the defined weight and rating selected for each behavioural attribute. The weightings, ratings and scores are tallied up to present an overall score for the employee.

Multi-Rater Feedback can also be captured for each criteria. (For more information on Multi-Raters please refer to section 2.2.1 of this overview).

Other criteria may be imported from Buildsmart HR Advanced using the "Import Setup" facility. (For more information on importing setups please refer to section 2.2.2 of this overview).

2.5. Outcomes

The “Outcomes” screen allows users to capture information related to the outcome of an employee’s appraisal. This information includes:

- Employee’s and appraiser’s agreement with score;
- Employee’s and appraiser’s comment on performance;
- Discussions pertaining to the employee’s performance;
- Development needs and plans;
- Required training; and
- General concerns and issues raised during the performance review.
- Follow-up Requirements;
- Follow-up By When;
- Who is to Follow-up; and
- Next Appraisal Date.

Discussions & Follow-up

Employee Agrees with Score? Yes No Not Applicable

Employee's Reason for Disagreeing

Appraiser Agrees with Score? Yes No Not Applicable

Appraiser's Reason for Disagreeing

Employee's Comments on Performance

Appraiser's / Manager's Comments on Performance

Development Needs Discussed

Development Plan Discussed

Training Requirements Discussed

General Issues & Concerns Discussed

Follow-up Requirements Discussed

Follow-up by

Who is to follow-up Appraiser Internal External

Payroll

Employee / Name

Next Appraisal

Next Appraisal Date

Next Appraisal Type

Appraiser Internal External

Payroll

Employee / Name

2.6. Rewards

The “Rewards” screen allows for the capture of information related to any salary increases to be given or not given based on the employee’s performance. Information includes:

- Increase / Reward Type;
- Proposed Amount / Value OR Percentage;
- Proposed and Effective Increase Date;
- Employee’s and Employer’s Comments on Increase; and
- Payroll Notification Details.

Please note:

The employee’s Pay Information at the time of the appraisal will be displayed. This information will only be available to users that have permission to view employee pay information.

Increase Details

Increase? Yes No Not Applicable

Increase / Rewards

Increase / Reward Type

Proposed Amount / Value

OR Percent

Comments

Add Update Remove Remove All

Type	Amount	Percentage
CPI increase	0.00	10.00

Proposed Increase Date

Effective Increase Date

Pay Information at time of Appraisal

Hourly Rate	16.89	Daily Rate	135.14
Weekly Rate	675.68	Monthly Rate	2,928.40
Package Total	2,928.00	Retirement Funding Income	2,686.00
Gross Cash	2,769.00	Taxable Earnings	2,568.00
Date of Last Package Change	01/03/2009		

Employee's Comments on Increase	<input type="text"/>
Employer's Comments on Increase	<input type="text"/>
Payroll Notification	
Payroll Notified	<input checked="" type="radio"/> Yes <input type="radio"/> No
Date Notified	dd month yyyy <input type="button" value="Calendar"/>
Person Notified	<input checked="" type="radio"/> Internal <input type="radio"/> External
Payroll	<input type="text"/>
Employee / Name	<input type="text"/>
Confirmation	<input checked="" type="radio"/> Yes <input type="radio"/> No
Confirmation Date	dd month yyyy <input type="button" value="Calendar"/>
Confirmed By	<input type="radio"/> Internal <input checked="" type="radio"/> External
Payroll	<input type="text"/>
Employee / Name	<input type="text"/>
Comments	<input type="text"/>
<input type="button" value="Payroll Notification"/>	

2.7. Promotability

The “Promotability” screen allows for the capture of information related to any promotions to be considered or not based on the employee’s performance. Information includes:

- Promotability details including the:
 - Reason for Promotion;
 - Position or Job Title to which the employee is promotable;
 - Priority to be given to the employee;
 - Date Identified; and
 - Time Period in which the employee could be promoted.

Promotability

Promotable? Yes No Not Applicable

Reason for Promotion

Position / Job Title Details

Promotable To... Position Job

Select from PSiberHRM? Yes No

Position / Job Title

Reason

Priority

Date Identified dd month yyyy

Time Period 0

Position / Job Title	Priority	Time Period
Account Collector	Medium Priority	Year(s) -

Promotability Summary

Included at the bottom of this screen is the Promotability Summary. This summary allows you to view all promotions that the employee has been identified for from an appraisal, from the Buildsmart HR Advanced module and from the Performance & Succession facility. (Refer to section 5.3 of this overview for more information on Performance & Succession Promotability.)

Position / Job Title	Priority	Source	Date
Account Collector	Medium Pri...	Appraisal	11/02/2009
A & P Mechanic	Medium Pri...	Performance & Successi...	11/02/2009
Human Resource Specia...	Medium Pri...	Appraisal	11/02/2009

Appraisal Promotability Details	
Appraisal Date	01/02/2009
Appraisal Name	DET2
Appraisal Type	Climate Assessment
Promotable To	Position
Position / Job Title	Human Resource Specialist
Reason	Experience
Priority	Medium Priority
Date Identified	11/02/2009
Time Period	6 Months

2.8. Summary

The “Summary” screen gives you an overall view of appraisals conducted in a specified time frame. Information includes the highest, lowest and average scores for KPA Ratings, Behavioural Ratings and Other Criteria.

Performance Summary

Filter By

Appraisal Type <All ▾

Review Type <All ▾

Date Selection

To Current Date

Selected Period

Year ▾

From Date dd month ▾ yyyy Calendar

To Date dd month ▾ yyyy Calendar

Appraisals Conducted	2.00	
Completed	1.00	
Uncompleted	1.00	
Formal Appraisals Conducted	1.00	
Informal Appraisals Conducted	1.00	
Key Performance Area Ratings	Actual	Expected
Highest Overall Score Achieved	250.00	250.00
Lowest Overall Score Achieved	200.00	200.00
Average Overall Score Achieved	225.00	225.00
Highest Overall Rating Achieved	5.00	5.00
Lowest Overall Rating Achieved	4.00	4.00
Average Overall Rating Achieved	4.50	4.50
Average Key Performance Area's	1.00	
Behavioural Ratings	Actual	Expected
Highest Overall Score Achieved	300.00	350.00
Lowest Overall Score Achieved	150.00	200.00
Average Overall Score Achieved	225.00	275.00
Highest Overall Rating Achieved	6.00	7.00
Lowest Overall Rating Achieved	3.00	4.00
Average Overall Rating Achieved	4.50	5.50
Average Behavioural Attributes	1.00	

3. Interpretation of the Rating Scale

The Buildsmart HR Appraisal facility uses a predefined rating scale from 1 to 7. This rating scale is fixed and cannot be modified. Customisation of rating scales will be addressed in future releases. The ratings, their descriptions, and their interpretations are as follows:

Performance Rating	Rating Description	Performance Description	Guidelines
7	Superior Performer	Individual performance consistently exceeds customer / goal requirements	Individual performance consistently exceeds customer, job and goal requirements on both the what and the how: <ul style="list-style-type: none"> Employee is an exceptional performer Always / consistently exceeds expectations No / little guidance and supervision required Exceptional self-management practices
6	Excellent Performer	Individual performance generally exceeds customer / goal requirements on most occasions	Individual performance fully meets expectations and frequently exceeds customer, job and goal requirements on both the what and the how: <ul style="list-style-type: none"> Employee is a superior performer Often / frequently exceeds expectations Little guidance and supervision required Great self-management practices
5	Above Average Performer	Individual performance achieved, exceeding customer / goal requirements on few occasions	Individual performance fully meets expectations and occasionally exceeds customer, job and goal requirements on both the what and the how: <ul style="list-style-type: none"> Employee is a reliable performer Sometimes exceeds expectations Less guidance and supervision required Strong self-management practices
4	Good Performer	Individual performance achieved , meeting customer / goal requirements on all occasions	Individual performance fully meets expectations. Both the what and the how is achieved in the delivery against customer, job and goal requirements: <ul style="list-style-type: none"> Employee is a reliable performer Always meets expectations Good self-management practices
3	Good Performer	Individual performance generally achieved, with some extend meeting customer / goal requirements	Individual performance does not fully meet expectations. Improvement is required in the what and/or the how of the delivery against customer, job and goal requirements: <ul style="list-style-type: none"> Employee does not always perform to expected standard regarding the what and the how Improvement is required on both Extensive guidance or supervision is required to ensure performance against goals Inadequate self-management

			practices
2	Under Performer	Individual performance achieved on limited occasions, partially meeting customer / goal requirements	Individual performance does not fully meet expectations. Improvement is required in the what and/or the how of the delivery against customer, job and goal requirements: <ul style="list-style-type: none"> ▪ Employee does not always perform to expected standard regarding the what and the how ▪ Improvement is required on both ▪ Extensive guidance or supervision is required to ensure performance against goals ▪ Self-management practices require urgent attention
1	Very Poor Performer	Individual performance does not achieved customer / goal requirements	Individual performance consistently does not meet expectations on the what and the how of delivery against customer, job and goal requirements: <ul style="list-style-type: none"> ▪ Employee never performs to the expected standard ▪ Improvement is required on both ▪ An excessive amount of guidance or supervision is needed ▪ Very low self-management practices

These interpretations can be viewed by clicking the **“Help”** button located in the **“KPA Rating”** and **“Behaviour Rating”** screens.

4. Performance & Succession Introduction

The performance and Succession facility allows you to capture details relating to the employee's potential with the company, his overall performance, the risk of the employee leaving the company as well as retention information and promotability details. These details can be captured according to appraisals that have been conducted, or can just be a brief overview of the employee's performance in general.

5. Performance & Succession Screens and Functionality

The following screens are included in the Performance & Succession facility:

- Performance & Potential Analysis;
- Risk and Retention Analysis;
- Promotability Analysis; and
- Summary

5.1. Performance and Potential Analysis

This section will allow to evaluate the employee in terms of how well they are performing and what their potential is within the company. The following information can be maintained in this screen:

- Date Conducted;
- Performance Appraisal Details (if based on appraisal);
- Performance Rating (eg: Superior Performer);
- Performance Description; and
- Potential Rating (eg: Good Potential).

Performance and Potential Analysis

Date Conducted dd month yyyy

Conducted By Internal External

Payroll

Employee / Name

Performance Appraisal Details

Based on Appraisal(s) No Yes

Appraisal Date

Appraisal Name

Appraisal Date	Appraisal Name	Appraisal Type

Performance Rating

Performance Description

Potential Rating

Performance / Potential Definitions

Definition

Comments

5.2. Risk & Retention Analysis

The Risk and Retention facility will enable to determine how critical an employee is to your company and the risk of that employee leaving the company in a certain time frame. The following information can be maintained in this screen:

- Date Conducted;
- Performance Appraisal Details (if based on appraisal);
- Risk Rating (eg: Medium);
- Criticality to Company (eg: Extremely Critical);
- Reasons for Criticality;
- Propensity to Leave (eg: High);
- Propensity to Leave Time Period; and
- Recommended Retention Actions.

Risk and Retention Analysis

Date Conducted dd month yyyy Calendar

Conducted By Internal External

Payroll [Dropdown]

Employee / Name [Dropdown]

Performance Appraisal Details

Based on Appraisal(s) No Yes

Appraisal Date [Dropdown]

Appraisal Name [Dropdown]

 Add Remove Remove All

Appraisal Date	Appraisal Name	Appraisal Type

Risk Rating [Dropdown]

Criticality to Company [Dropdown]

Reasons for Criticality

Reason [Dropdown]

 Add Remove Remove All

--	--	--

Propensity to Leave

Time Period / Description

Reason

Recommended Retention Actions

Retention Action

Comments

Risk and Retention Summary

Date Conducted	Risk Rating	Criticality	Propensity to Leave
2009/02/21	High	Extremely critical	Low
2009/02/19	Low	Extremely critical	Low

5.3. Promotability Analysis

This facility allows you to manage the promotability of your employees. The following information can be maintained in this screen:

- Date Conducted;
- Performance Appraisal Details (if based on appraisal);
- Promotability Rating;
- Promotable Reason;
- Promotable To (Position / Job Title); and
- Position / Job Title Details.

Promotability Analysis

Date Conducted dd month yyyy

Conducted By Internal External

Payroll

Employee / Name

Performance Appraisal Details

Based on Appraisal(s) No Yes

Appraisal Date

Appraisal Name

Appraisal Date	Appraisal Name	Appraisal Type

Promotable Rating

Promotable Reason

Position / Job Title Details

Promotable To... Position Job

Select from PSiberHRM? Yes No

Position / Job Title

Reason

Priority

Date Identified dd month yyyy

Time Period 0

Position / Job Title	Priority	Time Period

Promotability Analysis Summary

Date Conducted	Promotable Rating
2009/02/11	Low
2009/02/13	Low

Promotability Summary

Position / Job Title	Priority	Source	Date
Analyst	Low Priority	Performance & Successi...	25/02/2009
Human Resource Specia...	Medium Pri...	Appraisal	11/02/2009
Account Collector	Medium Pri...	Appraisal	11/02/2009
A & P Mechanic	Medium Pri...	Performance & Successi...	11/02/2009

Promotability Summary

Included at the bottom of this screen is the Promotability Summary. This summary allows you to view all promotions that the employee has been identified for from an appraisal, from the Buildsmart HR Advanced module and from the Performance & Succession facility. (Refer to section 5.3 of this overview for more information on Performance & Succession Promotability.)

5.4. Performance Summary

The Summary screen will display the basic information of the latest performance and potential analysis, risk and retention analysis and promotability analysis.

Latest Performance and Potential Analysis		
Date Conducted: 03/02/2009		
Performance Rating	Performance Description	Potential Rating
Superior Performer	Major leaguer	Above average potential

Latest Risk and Retention Analysis		
Date Conducted: 21/02/2009		
Risk Rating	Criticality To Company	Propensity To Leave
High	Extremely critical	Low

Latest Promotability Analysis		
Date Conducted: 13/02/2009		
Promotability Rating	-	-
Low	-	-

6. Reports

The following Appraisal reports are available:

- **Basic Appraisal Details**

Displays all information captured per employee appraisal and can be selected according to appraisal dates, appraisal type, review type and appraiser. The report also has a signatory section allowing employees, managers and appraisers to formally sign-off employee appraisals. The report is located in the Employee Report category.

Appraisal Details section (Sample)

Tax Year: (March 2006 - February 2007)		PSiber Holdings PSiberSTAFF Employee Basic Appraisals		Printed: Tue Jan 15 11:33:24		
Basic Appraisal Details			Employee Details			
Appraisal Name:	Annual Performance Assessment		Number:	17		
Appraisal Date:	23/10/2007		Name:	ALCALA, D M		
Appraisal Type:	Performance Assessment		Payroll:	PSiberSTAFF		
Appraisal Review Type:	Formal		Department:	Admin, Dcp3 (Admin)	Cost Centre:	Admin
Appraisal Review Period From:	02/11/2006		Division:			
Appraisal Review Period To:	09/10/2007		Appraiser Details			
Reason for Appraisal:	General assessment for promotability and salary increase.		Internal:	<input checked="" type="checkbox"/>	External:	<input type="checkbox"/>
			Number:	16		
			Name:	MAHLANGU		
			Payroll:	PSiberSTAFF		
			Department:	Admin, Dcp3 (Admin)	Cost Centre:	Admin
			Division:			

KPA Rating section (Sample)

Tax Year: (March 2006 - February 2007)		PSiber Holdings PSiberSTAFF Employee Basic Appraisals		Printed: Tue Jan 15 11:33:24					
Key Performance Area Rating									
Key Performance Areas	Key Performance Indicators	Measurable Outputs	Weighting	Actual		Expected		Comments	
				Rating	Score	Rating	Score		
1	Manage Budget and Expenses	Identify expenditures and receivables	Process payments and receipts within 60 days	20	6	120	5	100	Maintain department budget within 10% variance
2	Communication	Foster open communication between supervisors, peers and subordinates	Conduct weekly department head & bi-monthly co-worker meetings	20	3	60	5	100	
3	Manage Manpower Planning	Utilise labour scheduling tools	Manpower plan follow demand pattern	20	6	120	6	120	
4	Manage Staff	Provide training, direction, supervision, evaluation and corrective action when required	Acts as role model for all employees by demonstrating behaviour and work ethic expected of all PSiber employees	20	4	80	6	120	
5	Management Reporting	Submit approved status reports to top management	Submit on a monthly basis	20	7	140	6	120	
Total				100	28	520	28	560	

Signatory section (Sample)

Tax Year: (March, 2005 - February, 2007) Printed: Tue Jan 15 11:33:25

**PSiber Holdings
PSiberSTAFF
Employee Basic Appraisals**

Acknowledgement

I hereby acknowledge that I have read, understand and accept the

- 1) Performance rating;
- 2) Behavioural rating;
- 3) Outcomes;
- 4) Discussions; and
- 5) Rewards

stated in this Appraisal

Employee Signature: _____ Date: _____

Appraiser Signature: _____ Date: _____

Manager Signature: _____ Date: _____

- **Employee Appraisal Template**

This template can be used to manually capture the details of an employee's appraisal. Once filled in it can be used to capture the appraisal information into the Buildsmart HR system. This report is located in the 'Forms and Templates' category

- **Appraisals Conducted Summary**

This report will display a summary of employees with details of the appraisals that have been conducted. This can be viewed for completed appraisals or appraisals that are still in the process of being conducted. This report can be run by a specific date period, appraisal type or appraisal review type.

Print Date: 2007/06/11 03:37:22

Company / Group Name
Payroll Name
Conducted Appraisals Summary

For Period : _____

-----Overall Scores-----

--Review Period-- -----KPA----- -----Behavioural----- -----Other-----

Employee	Appraisal Date	Appraisal Name	Appraisal Type	Review Type	From	To	Actual	Expected	Actual	Expected	Actual	Expected	Reward / Increase?	Promotable?	Completed
Cost Centre / Department / Job Title / Job Grade															
Appraisal Type															
Appraisal Review Type															
190 - Smith, J	02/05/2008	Quarterly Review	Performance	Formal	02/02/2008	02/05/2008	6	6	-	-	-	-	Yes	Yes	No
xxxx	xxxx	xxxx	xxx	xxx	xx	xxx	x	x	x	x	x	x	x	x	x
Number of Appraisals Conducted															
Number of Employees															
Total Number of Appraisals Conducted															
Total Number of Employees that have had appraisals															

- **Appraisals Not Conducted Summary**

This report will display all employees that have no appraisals captured within a specified period of time.

Company / Group Name								Print Date: 2007/05/11 03:37:22
Payroll Name								
Appraisals Not Conducted Summary								
Employee	Employee Date	Job Grade	Job Title	Occupational Category	Occupational Level	Cost Centre	Department	Person Reporting to
Data Range								
Cost Centre / Department / Division / Job Grade / Job Title								
Appraisal Type								
Employee Number, Name	01/01/2007	BL	Service Bartender	Service and Sales Worker	Unskilled and Defined Decision Makers	Bar-CC	Services	Mary Saunders
Employee Number, Name	01/01/2007	BL	Service Bartender	Service and Sales Worker	Unskilled and Defined Decision Makers	Bar-CC	Services	Mary Saunders
Total Employees not yet appraised for appraisal type: 2								
Appraisal Type								
Employee Number, Name	01/01/2007	BL	Service Bartender	Service and Sales Worker	Unskilled and Defined Decision Makers	Bar-CC	Services	Gary Holt
Employee Number, Name	01/01/2007	BL	Service Bartender	Service and Sales Worker	Unskilled and Defined Decision Makers	Bar-CC	Services	Mary
Employee Number, Name	01/01/2007	BL	Service Bartender	Service and Sales Worker	Unskilled and Defined Decision Makers	Bar-CC	Services	Gary Holt
Total Employees not yet appraised for appraisal type: 2								

7. Appraisal Templates

Buildsmart HR offers an Appraisal Template facility in the Company Maintenance section providing you with an easy-to-use and convenient tool for managing appraisals across employees.

7.1. Appraisal Template Screen

This facility allows you to setup a template that can be used in multiple appraisals. The following information can be entered:

- Appraisal Template Description (eg: Senior managers or Secretarial);
- Appraisal Type;
- Date Created;
- Date Changed;
- Reason for Change;
- KPA, Behavioural Attributes and Other Criteria Details including:
 - Description / Attribute;
 - Key Performance Indicator;
 - Measurable Output;
 - Importance Level;
 - Weighting; and
 - Expected Rating

Appraisal Templates
Template Statistics

Appraisal Template Details

Template Code / Description

Appraisal Type

Date First Created dd month yyyy

Date Last Changed dd month yyyy

Changed By

Reason for Change

KPA, Behavioural & Other Setup

KPA
Behavioural
Other

Key Performance Area Details

Key Performance Area

Key Performance Indicator

Measurable Output

Importance Level

Weighting (out of 100)

Expected Rating (1-7)

Expected Score

Key Performance Area Rating Summary

Key Performance Area	Weight	Expected Rating	Expected Score
Total Score		0	0

Export All
Copy
Add
Update
Remove
Remove All

Appraisal Template Summary

Code / Description	Appraisal Type	Date Created	KPA	Behaviour	Other
Middle managers	General Assessment	11/02/2009	Yes	Yes	Yes

7.2. Functionality

The following functionality is available in the Appraisal Template facility:

- Copy Appraisal Template;
- Export Template; and
- Template Statistics.

7.2.1. Copy Appraisal Template

When copying an appraisal template you have the option of copying it within the same payroll or copying it to another payroll. When copying to the same payroll the template will be “cloned” to be reused and modified in that payroll. Copying to another payroll will “clone” the template as it is in payroll1 to be used in payroll2. A template may be copied to multiple payrolls at the same time.

The screenshot shows a 'Copy Template' dialog box with the following sections:

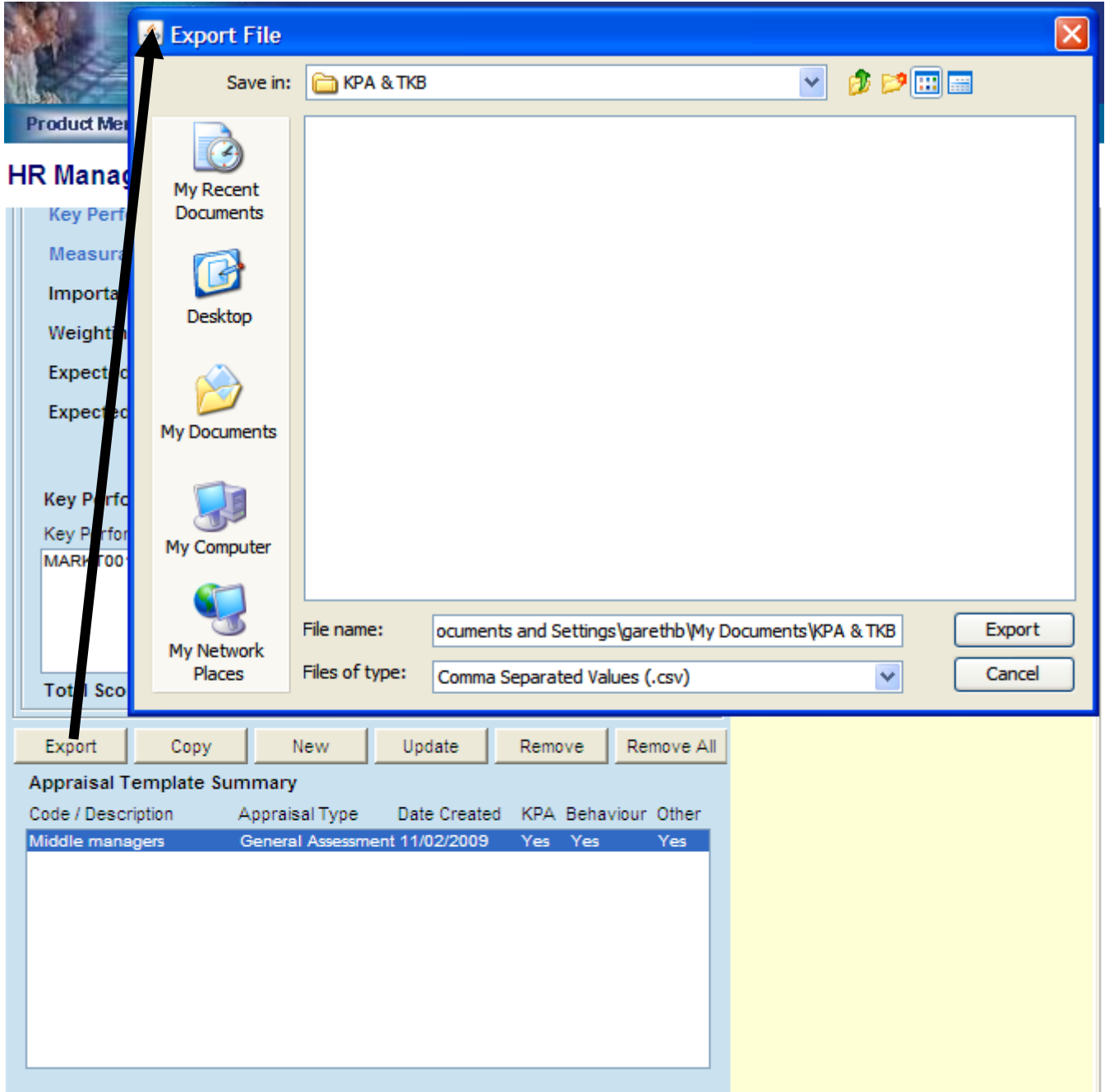
- Copy Options:** Two radio buttons: 'Copy to same Payroll' (selected) and 'Copy to other Payroll'. 'Cancel' and 'Accept' buttons are at the bottom right.
- Template Details:**
 - Appraisal Template Code / Name: [Dropdown]
 - Appraisal Type: General Assessment [Dropdown]
 - Date First Created: 9 March 2009 [Calendar]
 - Date Last Changed: 19 February 2009 [Calendar]
 - Changed By: [Text Field]
 - Reason For Change: [Text Area]
- Key Performance Area Setup:**

Key Perform... Area	Key Perfor... Indicator	Measurable Output	Importance Level	Weight	Expected		Include
					Rating	Score	
MARKT001 ...	Key Perform...	Measurable ...	Important	50	4 : Aver...	200	<input checked="" type="checkbox"/>
- Behavioural Attributes Setup:**

Behavioural Attributes	Importance Level	Weight	Expected		Include
			Rating	Score	
Alone : Can work alone	Somewhat important	60	2 : Und...	120	<input checked="" type="checkbox"/>
- Other Criteria Setup:** (partially visible)

7.2.2. Export Template

Exporting will allow you to save the appraisal template as a text or excel file.



7.2.3. Template Statistics

These statistics will display the number of templates and template types in each payroll (this will depend on user permissions).

The screenshot shows a window titled "Appraisal Template Statistics" with a close button in the top right corner. Below the title bar, the text "Appraisal Template Statistics" is centered. Underneath, it says "Number of appraisal templates created per payroll:". A table follows with three columns: "Payroll", "Appraisal Type", and "Number". The table lists various payroll codes and their corresponding appraisal types and counts.

Payroll	Appraisal Type	Number
P SilberSTAFF		4
	Future Potential Assessment	1
	General Assessment	1
	Performance Assessment	2
EmploymentEquity		1
	Performance Assessment	1
M & E Motors		0
MEIBC		0
P SilberBonus		0
P SilberHRM		0
P SilberPAY		1
	Future Potential Assessment	1
P SilberTAX		0
P SilberYEAREND		0
RFINBC		0

A "Close" button is located at the bottom right of the window.

END OF DOCUMENT

Buildsmart HR Modules Performance & Succession Overview

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