

User Guide

Performance Evaluation v3.0.0



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Performance Evaluation

1. Setup

Set Performance Type, Ranking type, Rating method, Factor Template and Criteria Template

1.1 Performance Type

Performance Type Information

PE Type * : 1

PE Type Cycle * : 2

PE Type Description : 3

Save 4 Clear 5

Records 6

Performance Type	Description	Frequency	Delete
Once 7		Once	<input type="checkbox"/>
Weekly		Weekly	<input type="checkbox"/>
Monthly		Monthly	<input type="checkbox"/>

Delete 8

1. Name the types of PE.
2. Select Type Cycle (*Annually, Quarterly, Monthly, Weekly, Once*)
3. Write a description for the Type of PE. This is optional field.
4. Click Save when all information required are in place
5. Click Cancel for cancellation of edit.
6. Record saved will be shown.
7. Click on the PE type (Name), link to view or edit the setting of PE type
8. Check on the box and click on the (8) Delete button to delete.

1.2 Performance Ranking

Ranking Information

Rank Name * : PE Ranking 1

Rank Description : Rank Guidelines 2

Save 4 Cancel

Ranking * 3

Rank	Score(%)	Description	Action
PIR	0 To < 20	Employee must demonstrate imp	<input type="checkbox"/>
Rank D	20 To < 40	Performance standards are not f	<input type="checkbox"/>
Rank C	40 To < 60	Work is fully satisfactory; emplo	<input type="checkbox"/>
Rank B	60 To < 80	Work is fully satisfactory and oft	<input type="checkbox"/>
Rank A	80 To <= 100	Work performance consistently e	<input type="checkbox"/>

5

Rank Name	Description	Delete
Appraisal Rating And Criteria 6	Rank Guidelines	<input type="checkbox"/>
Confirmation		<input type="checkbox"/>
Demo Ranking		<input type="checkbox"/>
PE Ranking 7	Rank Guidelines	<input checked="" type="checkbox"/> Used

Delete 8

1. Give a name to the Rank. The name must be unique from existed Rank
2. Write a description for the Rank. This is optional

3. Click on the [+] to add new rank band, [-] to remove the band. Ranking name is mandatory and the score must be in ascending order
4. Click Save when all information required are in place
5. Record saved will be shown on below
6. Click on the Rank Name link to view or edit the Rank setting
7. Check on the box and click on the (8) Delete button to delete. If the Rank has been used in any Performance Form, it will be shown as "Used" and cannot be removed.

1.3 Performance Rating

Performance Type Performance Ranking **Performance Rating** Performance Factor Template Performance Criteria Template

Rating Information

Score Name : ScoreRating 1

Score Description : 2

Score Method : ☒ User Define ☐ Range 0 To 0 Decimal 3

5 Save Cancel

Display Name	Value	Description	Action
1	1	Poor	+ -
2	2	Below Average	+ -
3	3	Good	+ -
4	4	Excellence	+ -

4

Records

6

Score Name	Score Description	Score Setting	Delete
Appraisal Rating And Criteria 7	Score Guidelines	User Defined	Used
Appraiser's Feedback		User Defined	Used
ScoreRating		User Defined	Used
Textbox		Range	Used
User Define 0-4		User Defined	Used

8 9 Delete

1. Give a name to the Score. The name must be unique from existed Score
2. Write a description for the Score. This is optional
3. Choose user define to set up a set of radio button for performance review rating purpose. Choose Range to have a textbox for performance review rating. Range must begin with 0 or 1 and maximum decimal point allowed is 3.
4. Click [+] to add rating option, click [-] to remove the option
5. Click Save when all required information are in place
6. Record saved will be shown on below
7. Click on the Score Name link to view or edit the Score setting
8. Check on the box and click on the (9) Delete button to delete. If the Score has been used in any Performance Form, it will be shown as "Used" and cannot be removed.

1.4 Performance Factor Template

Performance Type Performance Ranking Performance Rating **Performance Factor Template** Performance Criteria Template

Factor Template Information

Factor * : 1

Save Clear 2

Records

3 5 Delete

Factor	Edit	Delete
Absent Rate	Edit 4	<input type="checkbox"/>
% Correct Orders	Edit	<input type="checkbox"/>
Delivery to Promise Date	Edit	<input type="checkbox"/>
Disciplinary Non-Compliance	Edit	<input type="checkbox"/>
Improve Mean-Time-Between-Failure (MTBF)	Edit	<input type="checkbox"/>
% Improvement Projects Completed	Edit	<input type="checkbox"/>
Improve Parts Rejects (Current Rate 35%)	Edit	<input type="checkbox"/>
Improve Procurement Cycle Time	Edit	<input type="checkbox"/>
Production Yield Improvement	Edit	<input type="checkbox"/>
Punctuality	Edit	<input type="checkbox"/>
Reduce Downtime (Current Rate 35%)	Edit	<input type="checkbox"/>
Reduce Production Cycle Time	Edit	<input type="checkbox"/>
Total Cost Saving	Edit	<input type="checkbox"/>
% Vendor Defect	Edit	<input type="checkbox"/>

1. Fill in the Factor/ Objective template
2. Click Save to add to the system
3. Record saved will be shown on below
4. Click on the Edit link to view or edit the Factor Template
5. Check on the box and click on the (6) Delete button to remove the template from the list.

1.5 Performance Criteria Template

Performance Type Performance Ranking Performance Rating Performance Factor Template **Performance Criteria Template**

Criteria Template Information

Criteria Name * : 1

Description : 2

Assign Factor Save Clear 3 4

Records

7 Delete

Criteria Name	Criteria Description	Delete
BEHAVIOR		<input type="checkbox"/>
PROCESS (Engineering)	5	6 <input type="checkbox"/>
PROCESS (Procurement)		<input type="checkbox"/>
STRATEGIC (Engineering)		<input type="checkbox"/>
STRATEGIC (Procurement)		<input type="checkbox"/>

1. Fill in the Criteria/ Category name
2. Write the description. This is optional

Records

Retrieve
Add

Factor	Add
Absent Rate	<input checked="" type="checkbox"/>
% Correct Orders	<input checked="" type="checkbox"/>
Delivery to Promise Date	<input type="checkbox"/>
Disciplinary Non-Compliance	<input type="checkbox"/>
Improve Mean-Time-Between-Failure (MTBF)	<input type="checkbox"/>
% Improvement Projects Completed	<input type="checkbox"/>
Improve Parts Rejects (Current Rate 35%)	<input type="checkbox"/>
Improve Procurement Cycle Time	<input type="checkbox"/>
Production Yield Improvement	<input type="checkbox"/>
Punctuality	<input type="checkbox"/>

⏪ ⏴ Page (1 of 2) ⏵ ⏩

Close

3. Click Assign Factor to add the Factor set in Template to the Criteria. A list of Factor Template will be available to be added when the button is clicked. Choose the necessary Factor and click on Add to link the Factor to the Criteria.
4. Click Save to add to the system
5. Record saved will be shown on below
6. Click on the Edit link to view or edit the Criteria Template
7. Check on the box and click on the (6) Delete button to remove the template from the list.

2. Performance Evaluation Form (Admin)

Set PE time period, Form Objective and Employee Review Status checking

2.1 Form Setup (Admin)

Form Setup Form Setup History Employee Review Status Calibration Employee Objective Report

Admin Form

Form Name 1 : (2019-01-01 To 2019-12-31) - Performance Evaluation for 2019-Q4

Template Name 2 : No template created

Admin Form Setup

PE Type 3 : Quarterly - (Quarterly) Draft

PE Period 4 : Year 2019 Quarter 4

Form Name 5 : Performance Evaluation for 2019-Q4

Display Name 6 : HR Performance Evaluation Form 2019

Description 7 : This performance appraisal process is designed to evaluate an employee's performance for 2019 which is stated in the PE Period below.

PE Evaluation Period 8 : 2019-01-01 To 2019-12-31 [Clear All] Period Control 9

Setup Weight 9 : 100 Administrator 0 Supervisor

Supervisor Setup Period 10 : [Clear All]

Review Period 11 : 2019-12-01 To 2019-12-31 [Clear All]

Employee Self Assessment 12 : Yes After Supervisor Complete Review No

Calibration Process 13 : Calibration 1 Calibration 2

Skip Approval 14 : Skip Manager Approval Skip Review Acknowledgement

Employee Objective Acknowledgement 15 : Disable

Rank Setup 16 : PE Ranking

Save as draft Save as template Cancel

17 18

1. Choose existing Admin Form from drop down to view or edit
2. Or choose an existing template from drop down to view or edit
3. Select PE Type and it is mandatory field.
4. Select Year and Quarter/Month/Week in PE Cycle Period (* This not applicable for "Once" in PE Type)
5. Form Name is mandatory and it must be unique from existed Form
6. Display Name is the title to be displayed in Review Form
7. Description of the form is optional
8. PE Time Period is to indicate the date range of whole Performance Evaluation Cycle from Objective setup to completion of the review. Start Date is mandatory. If Time Period Control is turned on, PE will follow the timeline given. Setup and Review Time Period can be carried out only when the date is effective. PE Time Period End Date, Setup Time Period (If required supervisor to set the objective), Review Time Period is mandatory.
9. Setup Weight determines the Organizational and Functionality objective weightage. If All Objective is setup by HR, put 100 on Admin and Supervisor will not require to set the objective
10. If Supervisor Objective Setup is required, Setup Time Period is mandatory field if the Time Period Control is ON
11. Review Time Period is required if the Time Period Control is ON
12. Employee Self-Assessment is an option to control
 - a. Yes
 - i. After Employee Complete Review – Employee is able to do self-assessment. It is depend on supervisor request. However, Supervisor can view employee self-assessment result only after

- Supervisor complete and submit the form to higher supervisor for approval
- ii. Once Employee Complete Review - Employee is able to do self-assessment. It is depend on supervisor request. Supervisor can view employee self-assessment result once employee submit.
- b. No - No Employee Self-Assessment can be carried out
- 13. Calibration – Turn on or Turn off HR Calibration Process. HR will step in Performance Review approval before open to employee for Acceptance
 - a. Calibration I – PE will route to Admin after supervisor submits subordinate’s performance review for approval, before 2nd level supervisor get to do approval. Admin reject will request supervisor for resubmission. Admin approve will route to 2nd level supervisor for approval.
 - i. Mark “Activate Email Notification” to enable email notification to HR when calibration 1 is active.
 - b. Calibration II – PE will route to HR before employee’s acknowledgement.
 - i. Mark “Activate Email Notification” to enable email notification to HR when calibration 2 is active.
- 14. Skip Approval – Enable the form to skip certain flow of the form
 - a. Skip Manager Approval – Form will skip manager’s approval after supervisor submits the form. The form status will be at employee’s final acknowledgement after the supervisor submits the form with scores.
 - b. Skip Review Acknowledgement – Form will skip employee’s final acknowledgement after the manager approves the evaluation submitted by the supervisor.
 - c. Skip Manager Approval will be disabled if Calibration 1 is checked because calibration 1 requires the manager’s approval
- 15. Enables or disables the flow employee acknowledgement.
- 16. Ranking option set in Ranking setup which to determine the band employee is fallen to by their review result
- 17. Click save as template to add new PE template into the system
- 18. Click save to add the new PE cycle to system
- 19. The form (Picture below) not necessary needs to be completed when saving the PE cycle. But, it has to be completed when admin submit/ activate the form to supervisor.

2.1.1 Form Setup

Form

10 Clear All Preview 11

Tick the checkbox if mandatory	Criteria/ Factor	Rate	Factor Weight	Criteria Weight
<input checked="" type="checkbox"/>	PROCESS (Engineering)	Appraisal Rating And Criteria - Score Guidelines		10
<input checked="" type="checkbox"/>	% Improvement Projects Completed		25	
<input checked="" type="checkbox"/>	Improve Parts Rejects (Current Rate 35%)		25	
<input checked="" type="checkbox"/>	Reduce Downtime (Current Rate 35%)		25	
<input checked="" type="checkbox"/>	Reduce Production Cycle Time		25	
Total Factor Weight (100%):			100	
<input checked="" type="checkbox"/>	Criteria...	-		
<input checked="" type="checkbox"/>	Factor...			
Total Factor Weight (100%):			0	
Total Criteria Weight (30%):			9	10

- Click [+] to add new Criteria/ Category, [-] to remove the Criteria, including the criteria tied to it. Click Template to choose available Criteria which has been added in the Criteria Template
- You can also define new Criteria or edit the chosen template
- Choose the rating method of the Factor set
- Put a weight of the Criteria. It must be an integer.
- Click [+] to add new Factor/ Objective, [-] to remove the criteria. Click Template to choose available Factor which has been added in the Factor Template
- You can also define new Factor or edit on the template chosen
- If there is a weight value of the Factor. It must be an integer, total weight for criteria in a factor must be 100%
- If the value of weight is 0, total weight for criteria in a factor must be 0%
 - "0" weight value indicates comment box only without any measurements which will exclude from the form's total score calculation as shown below.
- Total weight for criteria in a factor must be 100%. Total weight of the factor determine by the admin percentage set in Setup Weight (%)
- Click Clear All to discharge all changes made and start with a blank form
- Click Preview to view the layout of performance evaluation form
- Enables or disables the Non-Applicable function of the criteria.
 - When disabled, users will have the option to not answer the criteria and the evaluation scores will be adjusted accordingly.
 - When enabled, users will have to answer the criteria.

Form

10 Clear All Preview 11

Tick the checkbox if mandatory	Criteria/ Factor	Rate	Factor Weight	Criteria Weight
<input checked="" type="checkbox"/>	PROCESS (Engineering)	Appraisal Rating And Criteria - Score Guidelines		10
<input checked="" type="checkbox"/>	% Improvement Projects Completed		25	
<input checked="" type="checkbox"/>	Improve Parts Rejects (Current Rate 35%)		25	
<input checked="" type="checkbox"/>	Reduce Downtime (Current Rate 35%)		25	
<input checked="" type="checkbox"/>	Reduce Production Cycle Time		25	
Total Factor Weight (100%):			100	
<input checked="" type="checkbox"/>	Criteria...	-		
<input checked="" type="checkbox"/>	Factor...			
Total Factor Weight (100%):			0	
Total Criteria Weight (30%):			9	10

13. When the form is ready to be activated, click on the Submit button. Supervisor will be able to view and assign the form to their subordinate.

14. If the form has been used by supervisor for **assign** for employees, no. of employee assigned to the form will be shown. Deletion of the form is not allowed at this time.
15. Click Edit Control to edit Time Period Control, PE Period, PE Setup Time Period, PE Review Time Period, and Self-Assessment Method. Other amendment is not allowed.

2.2 Form Setup History (Admin)

Form Setup **Form Setup History** Employee Review Status Calibration Employee Objective Report

PE Type:

PE Period:

PE Evaluation Period:

Form Name:

PE Status:

Retrieve

Records

PE Type	PE Period	PE Evaluation Period	Form Name	Period Control	Supervisor Setup Period	Review Period	Administrator Portion	Ranking	Status	Employee
Annually(Annually)	2019	2019-01-01 To 2019-12-31	Performance Evaluation for 2019	-- To --		2019-12-01 To 2019-12-31	100%	PE Ranking	Completed & Activated	Hide (2) Export

No.	Supervisor	Employee	Department	Job Title	Status	Acknowledgement
1	EMP010 - KHOO SIEW LING	EMP008 - ELIZABETH TEOH	Engineering	SENIOR ENGINEER	Setup Completed	-
2	EMP010 - KHOO SIEW LING	EMP009 - JOYCE WONG	Engineering	SENIOR ENGINEER	Setup Completed	-

1. The page shows all form which setup by admin. PE Type, PE Type Cycle, PE Time Period, Form Name and Status can be filtered
2. Click on the Form Name link to view/edit the Form Detail
3. Click on the link under Employee to view all employees who have been assigned with the PE Form by their supervisor.
4. Total No. of employee assigned to the form will be shown in the link

2.3 Employee Review Status (Admin)

Form Setup Form Setup History **Employee Review Status** Calibration Employee Objective Report

PE Type:
PE Evaluation Period:
Form Name:
PE Status:

PE Period:
Supervisor:
Department:
Employee:

Retrieve Export

Records

PE Type	PE Period	Form Name	PE Evaluation Period	Employee	Supervisor	Department	Review Status	Score(%)	Rank	Action
Annually(Annually)	2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	EMP008 - ELIZABETH TEOH	EMP010 - KHOO SIEW LING	Engineering	Completed	61.6	Rank B	View
Annually(Annually)	2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	EMP009 - JOYCE WONG	EMP010 - KHOO SIEW LING	Engineering	Supervisor Review	-	-	View
Annually(Annually)	2018	Performance Evaluation for 2018	2018-01-01 To 2018-12-31	EMP001 - ABDUL RAHMAN	EMP009 - JOYCE WONG	Quality Systems	Completed	43.64	Rank C	View

1. The page shows all employee review form. Retrieve can be done with filter on PE Type, PE Type Cycle, PE Time Period, Form Name and Status, Employee, Supervisor and Department
2. Click the Print link to view / Print the form objective and the result (if it has been reviewed completely)

2.4 Calibration (Admin)

Form Setup Form Setup History Employee Review Status **Calibration** Employee Objective Report

PE Type:
PE Evaluation Period:
Form Name:
PE Status:

PE Period:
Supervisor:
Department:
Employee:

Retrieve Export

Records

Expand All Collapse All

Approve Reject

PE Type	PE Period	Form Name	Supervisor	Department	Employee	Status	Score	Rank
-	-	Department Manager Competencies Library (2018 copy)	EMP010 - KHOO SIEW LING	Engineering	EMP008 - ELIZABETH TEOH	Supervisor Review	-	-
-	-	Department Manager Competencies Library (2018 copy)	EMP010 - KHOO SIEW LING	Engineering	EMP009 - JOYCE WONG	Supervisor Review	-	-
Annually(Annually)	-	Performance Evaluation for 2019	EMP010 - KHOO SIEW LING	Engineering	EMP008 - ELIZABETH TEOH	Completed	61.6	Rank B

1. The page will show only if Calibration is turned on.
2. It shows employee's performance evaluation status. When the status is Pending Calibration, mark the corresponding employee performance record and click Approve or Reject to perform action.

3. Performance Evaluation Form (Supervisor)

Supervisor assigns Form Objective to employee and assesses employee performance

3.1 Form Setup (Supervisor)

The screenshot shows the 'Form Setup' interface. The top navigation bar includes 'Form Setup', 'Form Setup History', 'Form Review', 'Form Review History', 'Evaluator Assignment', 'Employee Objective', and 'Report'. The 'Form Setup' section is active. It contains two main sections: 'Retrieve Supervisor Form' and 'Supervisor Form Setup'. The 'Retrieve Supervisor Form' section has two dropdown menus: 'Form Name' and 'Form Group'. The 'Supervisor Form Setup' section has a 'Form Name' dropdown, a list of fields (PE Type, PE Type Cycle, PE Evaluation Period, Setup Period, Review Period) with their respective values, and an 'Add' button.

1. Select Form Group to retrieve existing form. You may filter The Form Group by Form Name.
2. Click **Add** to create a new Form Group

The screenshot shows the 'Supervisor Form Setup' interface. It includes a 'Form Name' dropdown with the selected value '(2019-01-01 To 2019-12-31) - Performance Evaluation for 2019'. Below it, there are fields for 'PE Type' (Annually(Annually)), 'PE Type Cycle' (2019), 'PE Evaluation Period' (2019-01-01 To 2019-12-31), 'Setup Period' (2019-12-01 To 2019-12-31), and 'Review Period' (2019-12-01 To 2019-12-31). The 'Form Group' dropdown is selected, showing 'Performance Evaluation for 2019'. The 'Description' field is empty. The 'Assign Employees' section has a checkbox for 'Employee Self Setup' and a 'Due Date' field. The 'Available Employees' section lists four employees: EMP001 | ABDUL RAHMAN, EMP002 | BEN TAN, EMP003 | CHANDRA GUPAL, and EMP004 | DENNIS CHAN. The 'Assigned Employees' section is empty.

3. Select Form Name (Form activated by Admin). The form cannot be used to assign for employees if it is not activated (follow set effective date)
4. Give a Form Group name to the form.
5. Description is optional
6. If request employee to setup their own objective, check on the Employee Self Setup box and give a valid due date
7. If the form is created for a group of employee, whereas all employees sharing the same objectives, select employees, click Add >> to assign

Supervisor Form Setup

Form Name : (2019-01-01 To 2019-12-31) - Performance Evaluation for 2019-Q4 Draft

PE Type : Quarterly(Quarterly)
 PE Type Cycle : 2019 - Quarter 4
 PE Evaluation Period : 2019-01-01 To 2019-12-31
 Setup Period : - To -
 Review Period : 2019-12-01 To 2019-12-31

Form Group : Performance Evaluation for 2019-Q4

Description :

Assign Employees : ☒ Employee Self Setup Due Date : 2019-12-11
 EMP001 | ABDUL RAHMAN

Buttons: Add, Edit, Release To Employee, Delete

- If Employee Self Setup is required, click **Release to Employee** to send notification request to employee. Form objective set will be visible to employee

Supervisor Form Setup

Form Name : (2019-01-01 To 2019-12-31) - Performance Evaluation for 2019-Q4 Released to Employee

PE Type : Quarterly(Quarterly)
 PE Type Cycle : 2019 - Quarter 4
 PE Evaluation Period : 2019-01-01 To 2019-12-31
 Setup Period : - To -
 Review Period : 2019-12-01 To 2019-12-31

Form Group : Performance Evaluation for 2019-Q4

Description :

Assign Employees : ☒ Employee Self Setup Due Date : 2019-12-11
 EMP001 | ABDUL RAHMAN

Buttons: Add, Withdraw

- The Status will change to **Release to Employee**.
 User may click **Withdraw** button to cancel employee self-objective setup. By doing this, all employee objective previously set by subordinates will be erased
- When the subordinate complete and submit the form objective setup, the objective will be visible to supervisor. Supervisor can make changes on the objective and submit when it is completed

Form Setup | Form Setup History | Form Review | Form Review History | Evaluator Assignment | Employee Objective | Report

Retrieve Supervisor Form

Form Name : -
 Form Group : Performance Evaluation for 2019-Q4 - (ABDUL RAHMAN)

Supervisor Form Setup

Form Name : (2019-01-01 To 2019-12-31) - Performance Evaluation for 2019-Q4 Employee Setup Complete

PE Type : Quarterly(Quarterly)
 PE Type Cycle : 2019 - Quarter 4
 PE Evaluation Period : 2019-01-01 To 2019-12-31
 Setup Period : - To -
 Review Period : 2019-12-01 To 2019-12-31

Buttons: Add, Edit, Submit, Delete

- When form is submitted, it will send an acknowledgement request to employee

3.2 Form Setup History (Supervisor)

Form Setup **Form Setup History** Form Review Form Review History Evaluator Assignment Employee Objective Report

Retrieve

PE Type: PE Period:

PE Evaluation Period: Form Name:

PE Status: Form Group:

Records

PE Type	PE Period	Form Group	Form Name	PE Evaluation Period	Period Control	Supervisor Setup Period	Review Period	Supervisor Portion	Status	Action
Quarterly(Quarterly)	2019 - Quarter 4	Performance Evaluation for 2019-Q4	Performance Evaluation for 2019-Q4	2019-01-01 To 2019-12-31	-- To --	2019-12-01 To 2019-12-31	70%	Employee Setup Complete	Hide (1)	

No	Employee	Department	Job Title	Acknowledgement Date	Acknowledgement	Remarks	Action
1	EMP001 - ABDUL RAHMAN	Quality Systems	TECHNICIAN	-	-		<input type="button" value="Withdraw"/> <input type="button" value="Transfer"/> <input type="button" value="Delete"/>

1. The form shows the history setup by the supervisor
2. Click View to show all related employee of the PE Form in Group
3. Click on the Name of Form Group to view/ edit

3.3 Form Review (Supervisor)

Form Setup Form Setup History **Form Review** Form Review History Evaluator Assignment Employee Objective Report

Select Form : (2019-01-01 To 2019-12-31) - Performance Evaluation for 2019 1

Employee : EMP009 | JOYCE WONG

Form

2 Edit Submit

PE Type : Annually(Annually)

PE Type Cycle : 2019

Review Status : Supervisor Review

Review Period : 2019-12-01 - 2019-12-31

☐ Employee Self Review Due Date

1. Select Form Name and Employee Name to start review.
2. Click Edit to rate

Clear All

Form Attachment(s) Score

Interpersonal Communication [Weight:20%] 14%

	1	2	3	4	5	
1. Relates well to all people - up,down and across - internally and externally to the company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	25%
2. Establishes rapport; builds and maintains effective working relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	25%
3. Practices attentive and active listening	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	25%
4. Uses diplomacy and tact; can diffuse high-tension situations comfortably	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	25%

5

3. Rate the objective/ criteria
4. Give comment to the objective/ criteria. It is optional
5. Give comment to the category/ factor. It is optional

Interpersonal Communication [Weight:20%] 0 7 14%

		1	2	3	4	5			
1.	Relates well to all people - up, down and across - internally and externally to the company	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	25%	6	10% 7
2.	Establishes rapport; builds and maintains effective working relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	25%		20% 6

- Mark to apply **Non-Applicable function** to this factor or select check all to apply **Non-Applicable function** to the criteria
- Click on the attachment button to attach document/ pictures (*File support: pdf, jpg, png*) for form, individually category/ factor or objective/ criteria.

Choose the files to upload 9 Upload

Attachment File Name	Description
sample pic 2.png	Description

Choose File No file chosen 8
Maximum file size per attachment is 3MB. Only .jpg, .gif, .png, .pdf formats are allowed.

11 Delete

No.	Attachment File Name	Description	Modified Date
1	sample pic.png	remarks....	2019-12-03 18:59:21

10

Close

- Click on **Choose File / Browse** and choose the document/ pictures
- Click **Upload** button to upload the attachment
- Tick checkbox to select the attachments delete.
- Click **Delete** button to delete the selected attachment.
- Click **submit** when review is done.

Future Development Plan

Criteria/ Factor	Rate	Factor Weight	Criteria Weight
Criteria...	-		
Factor...			

Total Factor Weight (100%): 0

Total Criteria Weight (100%): 0

- Future Development plan will be available at the bottom of the form review. Saved future development plan will appear in the printable form when the form is completed. This part is only readable.

3.3.1 Employee Self-Assessment

Form

1 [Edit](#) [Release To Employee](#) 3

PE Type : Annually(Annually)
 PE Type Cycle : 2019
 Review Status : **Supervisor Review**
 Review Period : 2019-12-01 - 2019-12-31
 Ranking? : **Rank B (63.8%)**

2 ☒ Employee Self Review Due Date 2019-12-18

1. To have employee self-assessment, click on the **Edit** button
2. Check on the Employee Self Review, give a due date and **Save**
3. Click on **Release to Employee**. A self-assessment request will send to employee mailbox

Form

[Edit](#) [Withdraw](#) 4

PE Type : Annually(Annually)
 PE Type Cycle : 2019
 Review Status : **Employee Review**
 Review Period : 2019-12-01 - 2019-12-31
☒ Employee Self Review Due Date 2019-12-18

4. Supervisor can click **Withdraw** to cancel the self-assessment request
5. Supervisor can still evaluate employee while the employee is doing self-evaluation.
6. After the subordinate had submitted their self-assessment, their rate and comment will be shown on the form. (Depending on the Employee Self-Assessment method set by Admin on earlier stage)

3.4 Form Review History (Supervisor)

Form Setup Form Setup History Form Review **Form Review History** Evaluator Assignment Employee Objective Report

[Retrieve](#) [Export](#)

PE Type: - PE Period: - -
 PE Evaluation Period: - Form Name: -
 PE Status: - Form Group: -
 Subordinate Level: Level 1 Employee: -

Records

PE Type	PE Period	Form Name	PE Evaluation Period	Form Group	Review Period	Employee	Review Status	Score(%)	Rank	Emp Feedback	Action
Annually(Annually)	2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	Performance Evaluation for 2019	2019-12-01 To 2019-12-31	EMP008 - ELIZABETH TEOH	Completed	61.6	Rank B	-	Edit View
Annually(Annually)	2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	Performance Evaluation for 2019	2019-12-01 To 2019-12-31	EMP009 - JOYCE WONG	Employee Review	63.8	Rank B	-	Edit View

1. The form shows the subordinate review
2. Click Edit to assess the employee review. The form can only be Edit when it is yet to submit or being rejected by level 2 manager
3. Click on the View to preview and print the employee review result. The form will be available to view after supervisor submit the form

3.5 Evaluator Assignment (Supervisor)

The screenshot shows the 'Evaluator Assignment' tab in a software interface. The 'Assignment Form' section has two dropdown menus: 'Form Name' set to 'Performance Evaluation for 2019' (marked with a red '1') and 'Employee' set to 'EMP009 - JOYCE WONG' (marked with a red '2'). The 'Details' section shows 'Review Due Date' as '2019-12-03' (marked with a red '3') and 'Assign Evaluators' as 'Internal Evaluators'. Below this, there are two lists: 'Available Evaluators' (containing EMP001 to EMP005) and 'Assigned Evaluators' (empty). Between the lists are buttons for 'Add >>', 'Remove <<', and 'Edit' (marked with a red '3').

1. Select Form Name to show assigned employees for the form.
2. Select employee that will be evaluated by other evaluators.
3. Click Edit.

This screenshot shows the 'Details' section of the form. The 'Review Due Date' is '2019-12-03' (marked with a red '4'). The 'Assign Evaluators' section is set to 'Internal Evaluators'. Below this, there are two lists: 'Available Evaluators' (containing EMP001 to EMP008) (marked with a red '5') and 'Assigned Evaluators' (empty). Between the lists are buttons for 'Add >>', 'Remove <<', 'Add All >>', and 'Remove All <<'. Below the 'Available Evaluators' list, there is a section for 'External Evaluators' with a checkbox for 'External Evaluator Profile' (marked with a red '6'). At the bottom right, there are buttons for 'Save as draft' (marked with a red '7') and 'Cancel'.

4. Select due date for the evaluators to submit their reviews.
5. Select internal evaluators (internal of company)
6. Select external evaluators (external of company)
7. **Save** form.

Note: Invitation to evaluator will only be available when the form is submitted by the supervisor in the form setup (refer 3.1).

3.5.1 External Evaluator's Profile

☒ **External Evaluator Profile**

Create **Edit** **Delete** - ▼ **1**

Name* : **2**

Company* : **3**

E-mail Address* : **4**

Contact Number : **5**

Save

1. Selects existing profile for edit or deletion or create new profile
2. Key in name of the evaluator
3. Key in company of evaluator
4. E-mail Address should be unique
5. Contact Number are optional

4. Performance Evaluation Form (User)

- Employee set the performance objective (if requested from supervisor)
- Send acknowledgement of the set objective form
- Self-Assessment (if requested from supervisor)
- Send acknowledgement/ feedback of their performance review result
- View their current and historical Performance Evaluation

4.1 Appraisal

4.1.1 Objective Definition

Appraisal History Objective Setup Self Assessment Employee Objective Report							
Objective Definition							
PE Type	PE Period	Form Name	Form Group	PE Evaluation Period	Supervisor	Due Date	Action
Quarterly(Quarterly)	2019 - Quarter 4	Performance Evaluation for 2019-Q4	Performance Evaluation for 2019-Q4	2019-01-01 To 2019-12-31	EMP009 - JOYCE WONG	2019-12-11	Edit

If the employee is requested to set own performance objective, the record of request will be shown under Objective Definition

1. Click **Edit** to go to Form Objective Setup Page.

Appraisal History Objective Setup Self Assessment Employee Objective Report				
Employee Form				
Form Name	:	Performance Evaluation for 2019-Q4		
Form				
Setup Due Date	:	2019-12-11	Draft	Edit Submit
Preview				
<input checked="" type="checkbox"/> Show Admin Form				
Criteria/ Factor	Rate	Factor Weight	Criteria Weight	
Interpersonal Communication	Appraisal Rating And Criteria - Score Guidelines		30	
Relates well to all people - up,down and across - internally and externally to the company		25		
Establishes rapport; builds and maintains effective working relationships		25		
Practices attentive and active listening		25		
Uses diplomacy and tact; can diffuse high-tension situations comfortably		25		
Total Weight (100%):		100		
		Total Weight (30%):	30	

2. Click **Edit** to set objective.
3. Save objective
4. Click **Submit** once complete

4.1.2 Objective Acknowledgement

Appraisal History Objective Setup Self Assessment Employee Objective Report

Objective Definition

PE Type	PE Period	Form Name	Form Group	PE Evaluation Period	Supervisor	Due Date	Action
No Record							

Obj. Acknowledged

PE Type	PE Period	Form Name	PE Evaluation Period	Supervisor	Review Period	Request Date	Action
Quarterly(Quarterly)	Quarterly - Quarter 4	Performance Evaluation for 2019-Q4	2019-01-01 To 2019-12-31	EMP009 - JOYCE WONG	2019-12-01 To 2019-12-31	2019-12-03	Acknowledge

Once supervisor complete and submit Objective form objective, an acknowledgement request will be sent to employee (which shown above)

1. Click Link of Form Name to view the objective and its weightage
2. Click Acknowledge Link to view the objective form and its weightage, send acknowledgement to their respective supervisor

4.1.3 Self Assessment

Self Assessment

PE Type	PE Period	Form Name	Form Group	PE Evaluation Period	Supervisor	Due Date	Action
Annually(Annually)	2019	Performance Evaluation for 2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	EMP009 - JOYCE WONG	2019-12-17	Edit

If the employee is requested to do self-assessment, the record of request will be shown under Self-Assessment

1. Click Edit to review form of self-assessment

Appraisal History Objective Setup Self Assessment Employee Objective Report

Form Name : Performance Evaluation for 2019 - (2019-01-01 To 2019-12-31)

Form

PE Type : Annually(Annually)
 PE Type Cycle : 2019
 Form Status : Employee Review
 Review Period : 2019-12-01 To 2019-12-31
 Employee submission due date : 2019-12-17

Edit Submit

							Score		
Interpersonal Communication [Weight:20%]							0%		
1.	Relates well to all people - up,down and across - internally and externally to the company		1	2	3	4	5	25%	0%
2.	Establishes rapport; builds and maintains effective working relationships		1	2	3	4	5	25%	0%
3.	Practices attentive and active listening		1	2	3	4	5	25%	0%

2. Click **Edit** to rate performance objective.
3. Save the ratings
4. **Submit** once complete

4.1.4 Evaluator Assessment

If evaluators are requested to do assessment, the record of request record will be shown via email notification.

Evaluator Assessment

Invited Evaluator Review

Form Name : Performance Evaluation for 2019 - (2019-01-01 To 2019-12-31) ▼

Form

PE Type : Annually(Annually) Edit Submit Review

PE Type Cycle : 2019

Evaluatee : ABDUL RAHMAN

Review Status : Pending Review

Review Period : 2019-12-03 To 2019-12-04

Form Attachment(s) 📎

								Score
Interpersonal Communication	[Weight:20%]							0%
1. Relates well to all people - up,down and across - internally and externally to the company								
		1	2	3	4	5	25%	0%

1. Click **Edit** to rate the performance objective.
2. Save the ratings
3. **Submit** once complete.

4.1.5 Appraisal Acknowledgement

Appraisal Acknowledgement							
PE Type	PE Period	Form Name	PE Evaluation Period	Supervisor	Review Period	Request Date	Action
Annually(Annually)	2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	EMP009 - JOYCE WONG	2019-12-01 To 2019-12-31	2019-12-04	Feedback

When supervisor submit the review form and got approval from manager, an acknowledgement request of the Appraisal result will be sent to employee

1. Click the link of Form Name to view the appraisal result
2. Click on the link of Feedback to view the appraisal result, acknowledge/ give feedback to it

4.2 History

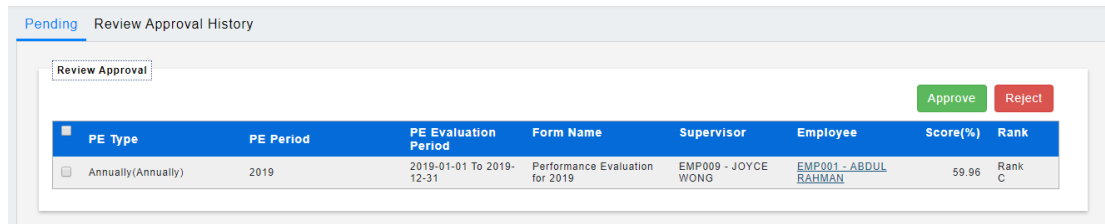
Appraisal History Objective Setup Self Assessment Employee Objective Report										
Records										
PE Type	PE Period	Form Name	Form Group	PE Evaluation Period	Supervisor	Obj. Acknowledged. Request Sent	Score	Rank	Aprsl Ack. Request Sent	Action
-	2019 - Quarter	Performance Evaluation for 2019-Q4	Performance Evaluation for 2019-Q4	2019-01-01 To 2019-12-31	EMP009 - JOYCE WONG	R: 2019-12-03 S: 2019-12-03	-	-	R: - S: -	View
-	2019	Performance Evaluation for 2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	EMP009 - JOYCE WONG	R: - S: -	-	-	R: - S: -	View
-	2018	Performance Evaluation for 2018	Performance Evaluation for 2018	2018-01-01 To 2018-12-31	EMP009 - JOYCE WONG	R: - S: -	43.64	Rank C	R: - S: -	View
-	2015 - Quarter	Performance Evaluation for Q2 2015	Group A	2015-04-01 To 2015-07-31	EMP009 - JOYCE WONG	R: - S: -	67.16	Rank B	R: - S: -	View
-	2015 - Quarter	Performance Evaluation Year 2015	Recruitment Group	2014-12-01 To 2015-03-31	EMP009 - JOYCE WONG	R: - S: -	54.36	Rank C	R: 2015-04-07 S: 2015-04-07	View

1. The page shows the status of employee's performance appraisal.
2. Click View for the form objective and the appraisal result (the result will be shown if only the appraisal is approved by manager)

5. Performance Evaluation Approval (Supervisor)

Level 2 Supervisor/ manager approve the Review Form which submitted by level 1 supervisor, on level 1 supervisor/ subordinate's performance evaluation form

5.1 Pending Approval



The screenshot displays a web interface for reviewing performance evaluations. At the top, there is a tab labeled 'Pending' and a header 'Review Approval History'. Below this is a 'Review Approval' section with two buttons: 'Approve' (green) and 'Reject' (red). A table lists the pending evaluations with columns for PE Type, PE Period, PE Evaluation Period, Form Name, Supervisor, Employee, Score(%), and Rank. One entry is shown for an annual evaluation for 2019, submitted by Joyce Wong to Abdul Rahman, with a score of 59.96 and a rank of C. The employee's name is a clickable link.

PE Type	PE Period	PE Evaluation Period	Form Name	Supervisor	Employee	Score(%)	Rank
<input type="checkbox"/> Annually(Annually)	2019	2019-01-01 To 2019-12-31	Performance Evaluation for 2019	EMP009 - JOYCE WONG	EMP001 - ABDUL RAHMAN	59.96	Rank C

Click on the link of employee to view the performance evaluation and approve or reject

If reject, remarks is mandatory. Level 1 supervisor will need to re-assess and resubmit the PE for approval.

5.2 Review Approval History

Pending [Review Approval History](#)

PE Type:

PE Evaluation Period:

Supervisor:

PE Period:

Form Name:

Employee:

Retrieve

Review Approval

PE Type	PE Period	Form Name	PE Evaluation Period	Review Period	Supervisor	Status	Employee
Quarterly(Quarterly)	2015 - Quarter 1	Performance Evaluation Year 2015	2014-12-01 To 2015-03-31	2015-01-01 To 2015-03-31	EMP009 - JOYCE WONG	Approved	EMP001 - ABDUL RAHMAN
Quarterly(Quarterly)	2015 - Quarter 2	Performance Evaluation for Q2 2015	2015-04-01 To 2015-07-31	2015-07-01 To 2015-07-15	EMP009 - JOYCE WONG	Approved	EMP001 - ABDUL RAHMAN

1. The page shows all review approval status
2. Mouse over on the comment box to view the approval remarks
3. Click on the link of employee to view the Performance Evaluation form of each employee.

6. Performance Objective Acknowledgement on Behalf (Supervisor)

Level 2 Supervisor/ manager acknowledge on behalf of level 1 supervisor's subordinate on the Performance Objective Setup

6.1 Acknowledge On Behalf

PE Type	PE Period	Form Name	PE Evaluation Period	Review Period	Request Date	Supervisor	Employee	Action
Quarterly(Quarterly)	2019 - Quarter 4	Performance Evaluation for 2019-Q4	2019-01-01 To 2019-12-31	2019-12-01 To 2019-12-31	2019-12-03	EMP009 - JOYCE WONG	EMP001 - ABDUL RAHMAN	Response

1. Click on the Response link to view the performance evaluation of the employee and to acknowledge on behalf or reject it
2. If reject the Performance Objective (PO), remarks is mandatory. Level 1 supervisor will need to resubmit the PO for acknowledgement.

7. Performance Evaluation Acknowledgement on Behalf (Admin)

Admin acknowledge on behalf of employee on the Performance Evaluation

7.1 Acknowledge On Behalf

PE Type	PE Period	Form Name	PE Evaluation Period	Employee	Supervisor	Department	Score(%)	Rank	Action
Annually(Annually)	2019	Performance Evaluation for 2019	2019-01-01 To 2019-12-31	EMP001 - ABDUL RAHMAN	EMP009 - JOYCE WONG	Quality Systems	59.96	Rank C	Feedback

1. Click on the link of Feedback to view the performance evaluation of each employee and to acknowledge on behalf.

8. Performance Evaluation Delegation

Delegated employee can act as the supervisor in creating and releasing an evaluation form.

Delegation

Form Setup History

Supervisor

Supervisor Name * : -

Retrieve Supervisor Form

Form Name : -

Form Group : -

Supervisor Form Setup

Form Name * : PE Type : -
PE Type Cycle : -
PE Evaluation Period : - To -
Setup Period : - To -
Review Period : - To -

Form Group * :

Description :

Assign Employees * : ☐ Employee Self Setup Due Date

Available Employees : Add >> Remove <<

Assigned Employees :

Form

Preview

☐ Show Admin Form

Criteria/ Factor

Rate

Factor Weight

Criteria Weight

Criteria...

-

Factor...

Total Factor Weight (100%): 0

Total Criteria Weight (0%): 0

1. If the employee is delegated by a supervisor to setup an evaluation form, employee selects the supervisor and continue to form setup as explain in [3.1 Form Setup \(Supervisor\)](#)

9. Performance Evaluation Report

Form Setup
Form Setup History
Employee Review Status
Calibration
Employee Objective
Report

Reports & Graphs

- Performance Evaluation Statistic By Average Score
- Performance Evaluation Statistic By Ranking (Annually)
- Performance Evaluation Statistic By Ranking (Biannually)
- Performance Evaluation Statistic By Ranking (Quarterly)
- Performance Evaluation Statistic By Ranking (Monthly)
- Performance Evaluation Statistic By Ranking (Weekly)
- Performance Evaluation Statistic By Ranking (Once)

Reference

- Performance Evaluation Report
- Performance Evaluation Average Score
- Performance Evaluation Statistic By Ranking(Annually)
- Performance Evaluation Statistic By Ranking (Biannually)
- Performance Evaluation Statistic By Ranking(Quarterly)
- Performance Evaluation Statistic By Ranking(Monthly)
- Performance Evaluation Statistic By Ranking(Weekly)
- Performance Evaluation Statistic By Ranking(Once)

1. Admin, supervisor and employee able to view report and graph based on the Ranking and PE Type.

